

COORDINATED INTAKE & REFERRAL (CIR) FOR CIVIL LEGAL AID IN THE DISTRICT OF COLUMBIA

Evaluation of the Pilot Launch of the DC Resource Bridge

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- Amara Legal Center (pilot launch)
- Asian Pacific American Legal Resource Center (pilot launch)
- Children’s Law Center (protocols workgroup)
- DC Affordable Law Firm (protocols workgroup, pilot launch)
- DC Bar Pro Bono Center (protocols workgroup, pilot launch)
- DC Volunteer Lawyer Project (pilot launch)
- Legal Aid DC (protocols workgroup, pilot launch)
- Mothers’ Outreach Network (pilot launch)
- Neighborhood Legal Services Program of the District of Columbia (protocols workgroup, pilot launch)
- Network for Victim Recovery DC (protocols workgroup, pilot launch)
- Whitman Walker (protocols workgroup)

We extend our gratitude to these individuals for their time and assistance with the DC Resource Bridge pilot launch and for the important work they do for District residents. It is our hope that the information compiled in this report supports the refinement of the DCRB to ensure that, when it is fully launched, it succeeds in its mission.

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EXECUTIVE SUMMARY

The District of Columbia has more than 50 organizations that provide free and low-cost civil legal services, but these providers offer different levels of assistance, address different legal areas, use different eligibility criteria, and operate with different capacities. This complexity creates often-insurmountable barriers for District residents to find an attorney to help them with critical civil legal needs, like those related to housing, health, employment, and family relationships. In response, the DC Bar Foundation (DCBF) has spearheaded an effort to develop a coordinated intake and referral system—*DC Resource Bridge* (DCRB)—to offer a single point of access for District residents to connect with a legal services provider. DCBF has employed a collaborative approach to system development, gathering input from District residents and members of the civil legal aid community to ensure that the DCRB design and operational workflows are both *user-centered* and *community-driven*.

Pilot Launch of the DC Resource Bridge

In June 2024, DCBF and key project partners initiated a limited-scope pilot launch of the DCRB, staffed by 2 non-attorney navigators who managed the intake and referral process. The pilot focused on one area of law (family law), involved 10 legal services providers (LSP), and was hosted by Neighborhood Legal Services Program of the District of Columbia (NLSP). The goal of the pilot was to test the DCRB’s workflows and technology platform in a small-scale, real-world environment. An evaluation study was conducted during the pilot period to assess implementation successes and challenges and to summarize this data to inform the full-scale launch of the DCRB.

Results: Referrals and Case Placements

In the 5-month pilot period, the DCRB navigators **closed cases for 122 applicants**. Of these:

- **70% were eligible for a referral to a legal services provider,**
- 13% were not eligible, often because their issue was not handled by the partnering providers,
- 9% stopped responding or withdrew their request for services.

Of the **85 eligible applicants** who were referred for legal services:



On average, the DCRB process, from intake screening to case placement, took **approximately 2 weeks**.

Main Takeaways:

The technology platform was user-friendly and effective at identifying accurate referrals.

- ✓ DCRB staff and legal services partners extolled the platform as easy to use and well built.
- ✓ Providers deemed 80% of the referrals they received to be appropriate for their organization.
 - Enhancements will be necessary to ensure that the platform maintains its accuracy and efficiency, and supports communication between the navigators and the providers, as the DCRB expands.

Referral protocols and staff workflows supported smooth operations.

- ✓ Navigators engaged a user-centered approach, emphasizing empathy, respect, and clear communication as necessary complements to the information gathering tasks of the intake process.
- ✓ Providers folded DCRB referrals into their existing intake processes without adjustment.
- ✓ DCRB staff and providers thought that the protocols and response timelines were appropriate, even though the case placement decision timeline was sometimes challenging.
- ✓ Most referrals followed the anticipated process, but a sizeable minority were non-linear and required attention and facilitation by navigators to complete.
 - Additional protocols will be necessary to address repeat clients, information sharing across providers, and augmentations to the intake screening interview as the DCRB expands to include new areas of law. Navigator FTE must keep pace with call volume to maintain a high level of service.

Communication and information sharing was key for successful collaboration.

- ✓ DCRB staff hosted regular meetings with partnering providers to discuss implementation success and challenges, give updates, and ask for system improvement requests.
- ✓ Providers appreciated these meetings and the availability of the DCRB staff to answer questions, underscoring how this communication set the tone for effective and trusting collaboration.
 - As the DCRB grows to include more providers, intentional efforts to cultivate and nurture a healthy collaboration will be necessary. Clear channels of communication will also be important.

Considerations for Full Launch of the DC Resource Bridge

The pilot launch provided proof of concept for the coordinated intake and referral process employed by the DCRB, but its limited scope also limited what could be tested. Some key aspects of operations under full-launch conditions remain unexamined, such as how navigators will include live calls into their workflow, how the platform will handle routing cases in multiple areas of law across dozens of providers, how the referral process will accommodate repeat clients, how the collaboration will be managed, and how the DCRB, aiming to stay community-driven, will be governed. These questions, and others named in this report, merit concerted attention and thoughtful discussion among DCRB partners to facilitate the system's potential to improve access to civil justice for all District residents.

INTRODUCTION

Civil legal problems are pervasive in the United States, especially among low-income households.¹ These problems are often entwined with critical livelihood issues, like housing stability, employment, and family relationships, and they have the potential to seriously impact people’s lives. While many people experience civil legal problems, few receive legal help to address them. One reason for this discrepancy is the often insurmountable challenge of finding an organization that provides appropriate, free civil legal services. Establishing a single point of entry for civil legal services—a coordinated intake and referral system in which multiple providers participate to address a wide range of civil legal needs—can streamline people’s access to legal help.

CONTEXT AND PURPOSE OF THE DC RESOURCE BRIDGE

In the District of Columbia (DC), finding free or low-cost civil legal help can be a daunting task. The District has more than 50 organizations that provide legal services, but they offer different levels of assistance, address different legal areas, use different eligibility criteria, and operate with different capacities. This complexity makes it difficult for District residents to find their way to a legal services provider who can help them, and many people never succeed in accessing the services they need. Even lawyers and other professionals can experience challenges referring clients to another provider who can offer appropriate legal assistance. Legal services providers’ intake staff also feel the strain, as they field many calls from people whom they cannot assist, either because the caller is not eligible for their services, the legal problem is not in an area they serve, or the problem is not legal in nature.

To address this dilemma, the DC Bar Foundation (DCBF) has led a collaborative effort to design and develop a coordinated intake and referral system—*DC Resource Bridge*—for people with civil legal needs in DC. The DCRB aims to provide a single point of access to connect District residents with a legal services provider (LSP) that can offer appropriate assistance. The DCRB will entail a dedicated phone line and website that can be used by people seeking legal help (“applicants”) or by organizations looking to refer a client for legal services. A customized technology platform handles the collection and storage of intake information, routing referrals to appropriate legal services providers via an algorithm, sending automated notifications that a referral has been initiated, and confirming the placement of cases with appropriate providers for services. The DCRB is staffed by trained, non-attorney navigators who conduct intake screenings with applicants, monitor the technology-enabled process, and ensure applicants are connected with an appropriate service provider. The DCRB *coordinates* intake among legal services providers to streamline the process for applicants—it does not *centralize* intake, nor will it replace existing intake processes at legal services organizations.

¹ Legal Services Corporation 2022 Justice Gap Report: <https://justicegap.lsc.gov/the-report/>

In the LSC report, households were considered “low income” if they had an income at or below 125% of the Federal Poverty Guidelines. In 2024, for a family of four, this threshold was \$39,000 per year.

PROCESS TO BUILD THE DC RESOURCE BRIDGE

At the start, DCBF convened a multidisciplinary team to manage the design and development of the DCRB, including local experts in civil legal aid, a technology partner to build the customized platform, and a research partner to integrate evaluation throughout the process. Building the DCRB involves 4 general phases:²

- 1) **Design**—Determine the system’s parameters and functionality, including staff roles, workflows and protocols, user-centered approaches, and specifications of technology components;
- 2) **Development**—Establish key infrastructure and partnerships, build the automated systems and technology components as per the design decisions, and hire staff (e.g., DCRB navigators);
- 3) **Pilot launch**—Conduct a limited-scope rollout of the system (e.g., small number of providers in one area of law) to test the workflow and the technology and to adjust and refine as necessary;
- 4) **Full launch**—Roll out the DCRB across all areas of law and all participating organizations within the District’s civil legal aid community and build the foundation to incorporate legal-adjacent and social service organizations in the future.

This report presents learnings from the pilot launch (phase 3).

USER-CENTERED SYSTEM DESIGN: INPUT FROM DISTRICT RESIDENTS

The foremost goal of the DCRB is to create a *user-centered system* that meets the needs of District residents in need of civil legal help. To center users’ voice in the process, DCBF allocated resources to gather input from residents—those who had connected with legal services on their own and those who had not—and use this input to inform DCRB design. This effort prioritized input from members of historically marginalized groups and individuals from populations considered to be vulnerable with respect to navigating the legal system. For example, focus group discussions were held with older adults, survivors of domestic violence and sexual assault, people with limited English proficiency, pregnant women, single mothers of young children, and people who are homebound due to serious illness. In total, 107 residents participated across 20 groups (in person and virtual) conducted in 2022 and 2023. Results were summarized in two reports³ and incorporated into the DCRB system design.

During focus groups, residents offered general guidance for DCRB administration and functionality, as well as specific recommendations to ensure its effectiveness for people in need of help. When asked about their prior experience seeking legal services, participants described challenging intake processes and unsuccessful attempts to connect with an attorney, or that they did not know free legal services were available or where to look for them. Overall, there was a sense of being unsupported and left to navigate a stressful legal case and the confusing court system on their own. (Notably, the few people






² A project timeline can be found at <https://www.dcbfoundation.org/coordinated-intake>

³ https://www.dcbfoundation.org/_files/ugd/3ddb49_858eab6d51e5444da63e2ee91a375c34.pdf and https://www.dcbfoundation.org/_files/ugd/3ddb49_88edd363a0b3443d9f988d63a85ace5b.pdf

who had successfully found an attorney extolled the virtues of legal services providers.) These reports confirmed DCBF’s original hypothesis about how the complexity of DC’s civil legal aid system impedes residents’ service access.

When asked about the DCRB concept, all focus group participants agreed enthusiastically that having a single phone number and website as an access point for legal services would benefit them and their neighbors. However, they acknowledged that the DCRB would be only as beneficial as it is functional and reliable. Throughout the discussions, feedback revolved around 5 main themes. Specifically, for the DCRB to succeed, it must be (1) easy to reach and easy to use; (2) effective, efficient, and communicative; (3) staffed with caring and compassionate navigators; (4) accountable to the people it serves; and (5) integrated into the broader social service ecosystem. See Exhibit 1.

Exhibit 1. Summary Recommendations from DC Resident Focus Groups

				
Accessible	Effective	Caring	Accountable	Integrated
The DCRB must be reachable and easy for applicants to use, regardless of language or literacy abilities.	The DCRB must operate effectively, place timely referrals, and be communicative and helpful.	The DCRB must staff navigators who are knowledgeable, compassionate, and committed to helping.	The DCRB must track its progress, be transparent, and offer applicants the means to redress any issues.	The DCRB must be well integrated within the broader service system in the District and the community.

COMMUNITY-DRIVEN SYSTEM DESIGN: INPUT FROM LEGAL SERVICES PROVIDERS AND CIVIL JUSTICE PARTNERS

Collaborating on General Design

Knowing that the idea of coordinated intake and referral had been circling in DC’s legal aid community for years, and also knowing that the success of the DCRB relied on the provider community’s buy-in and participation, DCBF sought to leverage the power of collaboration to bring the DCRB to life. Throughout the project, DCBF established ways for the legal services community and other local justice partners to offer input into the DCRB’s design. A few key activities are described below.

Request for Design Feedback and Input (RDFI) process. During the design phase, DCBF solicited early input from legal services providers and other civil justice system partners by publicly releasing a “Request for Design Feedback and Input” (RDFI) document in fall 2021. The RDFI outlined the purpose, scope, and then-current core design elements of the coordinated intake and referral process within the

DCRB, and gave interested parties an opportunity to provide feedback on the proposal and to offer suggestions for the system’s design, functionality, and implementation. The RDFI requested input on several elements of the DCRB design and operations, including the structure of the coordinated intake process, logistics of referral and information transfer between participating organizations, integration with existing issue-specific intake networks, user experience, and promoting the DCRB in the community. A total of 21 responses were submitted to the RDFI, including 15 responses from 13 legal services providers, 3 responses from existing collaborative bodies related to access to justice,⁴ and 3 responses from other interested parties who operate within the DC civil legal services community.

Overall, respondents were optimistic about the potential impact of the DCRB. They thought that the system could **ease the burden of finding legal help** by providing a streamlined service to connect residents to attorneys quickly, **deepen community relationships** by offering a trusted service that helps residents find legal help when they need it, and **expand access to justice** in civil legal cases by broadening the reach of legal services partners. While their suggested approaches varied, respondents were overall encouraged by the positive impact that a well-designed, citywide coordinated intake system could have and offered thoughtful suggestions on how to maximize its potential as a beneficial service to the community. All responses were summarized in a published report⁵ and incorporated into subsequent System design activities. Selected recommendations are shown in Exhibit 2.

Exhibit 2. Example Recommendations from RDFI Responses



DCRB Accessibility and Efficiency: Offer multiple avenues to access the DCRB; accommodate the unique needs of vulnerable populations; incorporate organizations providing social and legal-adjacent services; ensure adequate staffing to meet demand; minimize wait times; flag urgent cases for fast-tracked referral.



DCRB Navigator Position: Employ non-attorney navigators with an attorney supervisor; hire skilled staff and support high retention; train navigators on legal topics, confidentiality, ethics, best practices for intake work, trauma-informed principles, implicit bias, racial equity, crisis management, and domestic violence.



Efficient Case Routing: Standardize protocols that outline duties of DCRB staff and LSP staff; ensure DCRB intake screening is compatible with LSP intake interviews; create protocols for rerouting rejected referrals; work with partners to collectively determine timelines for reviewing referrals and communicating status; audit DCRB System data regularly.



DCRB Service Approach: Consider whether and how to integrate legal advice into the DCRB in the future; embed links to reliable legal information sources into the DCRB website; work with partners to explore opportunities to connect applicants with a range of legal services, including brief services and limited scope assistance.

⁴ For example, the DC Access to Justice Commission and the DC Legal Services Provider Consortium.

⁵ https://www.dcbfoundation.org/_files/ugd/3ddb49_70032eef071b40948bd677557817b7ce.pdf

Conversations with existing intake networks. With so many legal services organizations in the District, providers have long understood that a streamlined referral system would ease the burden on residents trying to find legal help. As a result, some targeted collaborations have emerged over time, involving a smaller number of providers addressing a single area of law or specific client population. Three currently operational intake and referral networks include: the Family Law Assistance Network (FLAN), the Landlord Tenant Legal Assistance Network (LTLAN), and the Victim Legal Network of DC (VLNDC).

To leverage the knowledge inherent in the District’s legal services community, focus group discussions were held with representatives from these intake networks to learn about their experiences. Staff discussed their network’s approach to coordination, protocols for intake and referral of cases, tools for cross-organization information sharing and confidentiality protection, and strategies for maximizing efficiency and effectiveness. They also shared their network’s strengths, challenges they encountered, lessons they have learned, and advice for the DCRB. Exhibit 3 shows the main feedback themes, and a full summary of results and recommendations was detailed in a published report.⁶

Exhibit 3. Areas of Input and Recommendations from Existing Intake & Referral Networks



The initial intake process, including how to balance the information gathered with the interview length, how to incorporate trauma-informed approaches, and how to share information among partner organizations and handle informed consent.



The referral process, including when and how to initiate referrals to legal services partners, monitor referrals to ensure case placement, orient applicants to the referral process, and assist applicants whom the network providers cannot serve.



The overall collaboration, including how to administer the network and support engagement, what data to gather to track progress, how to measure the network’s strengths and the impacts of network participation on the partner organizations.

Monthly CIR Chats. Throughout the project period, DCBF hosted monthly “CIR Chats” during which DCBF and partners discussed project progress and upcoming milestones, answered questions about the DCRB, and sought input from the legal services and justice community on key topics related to system development. These chats were held virtually, publicized through various channels, and open to anyone who registered. Registrants could submit questions in advance of the session.

Meetings with DC’s Access to Justice Commission. During the project period, DCBF and key project partners attended regular meetings with members of the DC Access to Justice (ATJ) Commission, a key voice on civil justice issues in the District. These meetings established a consistent point of contact to ensure information sharing and coordination between the DCRB and the Commission’s work to assess and develop updated self-help and legal information materials.

⁶ https://www.dcbfoundation.org/_files/ugd/3ddb49_89d93ecd908d4903a823fd9bdf32f091.pdf

Collaborating on the Pilot Launch

The DC Resource Bridge is not solely a technological solution—it is a user-centered, technology-supported process conducted by trained staff. As such, launching the DCRB required not only a customized technology platform, but a set of structured protocols to guide the workflow implemented by DCRB staff and legal services provider intake staff. DCBF invited members of the legal services community to actively participate in the development of these protocols to be used in the pilot launch, thus leveraging the expertise of providers and ensuring that the DCRB system is constructed by the people (legal services intake staff) who will be using it.

Pilot Protocols Workgroup. For 9 months before the start of the pilot launch, staff from 7 legal services providers met weekly to collectively consider and jointly develop protocols to structure an effective workflow for a coordinated intake and referral hub in their community. They established a foundational workflow, including protocols to guide DCRB navigators' work and response timelines for participating legal services providers (e.g., the number of days an LSP has to accept or reject a referral). The workgroup also forecasted issues that could impact implementation—such as applicant confidentiality and consent to release information, providers' changing capacity for new cases, and clients receiving brief services and calling again—and identified potential ways to address them. The protocols they established served as the basis for the pilot launch.

This workgroup collaborated with DCBF, the technology consultant, and Neighborhood Legal Services Program of DC (NLSP; the organization that hosted the pilot launch) to determine the scope of the pilot launch. Agreeing to start in a single area of law, partners chose family law cases (that did not solely focus on domestic violence) because the number of organizations handling these cases was large enough to offer variation in referrals, the case volume was high enough to offer a sufficient test of the DCRB system, and the cases did not typically involve quick procedural timelines.⁷

Pilot Participants Meeting. When family law was determined as the pilot launch area, all DCBF-funded legal services providers that handled family law cases were invited to participate (16 in total). Ten initially expressed interest, and 9 ultimately participated, although the level of participation varied, typically due to capacity (e.g., one provider had very limited family law attorney time, so they referred cases into the DCRB but did not accept any referrals from the DCRB). Staff from these 9 organizations attended weekly meetings for the first 3 months of the pilot and bi-weekly meetings for the following 3 months. In each meeting, the DCRB pilot project director provided updates on system operations and facilitated an open discussion among partners about what was working well, what challenges were being encountered, and what improvements to the DCRB system or workflow were desired. This information was fed back to the technology consultant who refined and augmented system functionality and to the DCRB navigators who adjusted workflow or communication protocols.

⁷ Other areas of law more frequently involve quick timelines (e.g., eviction cases). The pilot launch accepted only family law cases that did not solely focus on domestic violence issues (e.g., the need for protective orders), because domestic violence cases often do include short procedural timeframes.

DC RESOURCE BRIDGE PILOT LAUNCH

For the pilot, DCBF and NLSP launched a coordinated intake and referral system that integrated input gathered through the activities described above and work done by the Pilot Protocols Workgroup. The pilot launch sought to test and assess two dimensions of the DCRB: (1) the technical platform, such as the webforms used, information collected, database structures, case routing algorithms, and automated reports and processes, and (2) the workflow, such as how and when navigators initiated referrals, how and when legal services intake staff reviewed/rejected referrals and accepted/rejected cases, and how navigators followed up with applicants and monitored referral progress.

The pilot launch focused solely on family law cases (that did not focus solely on a domestic violence issue). Conducting the pilot launch in one area of law held several benefits. First, this approach limited the number of participating organizations and the potential referral routes playing out in the system, enabling a more efficient test of the DCRB's case routing algorithms. Second, this approach streamlined pathways of case referrals into the DCRB without publicly publishing the DCRB number. (To avoid confusion in the community, and to support a strong full launch, it was decided that the DCRB contact information would not be publicly released until the system was fully tested, operational, and ready to fully launch.) Third, this approach allowed the DCRB navigators to focus their early work on refining the system, related workflows, and their internal processes, before having to learn multiple areas of law.

Staff and Partner Preparation

DCRB staff. Upon assuming the role of host organization for the pilot launch, NLSP assigned a pilot project director (.5 FTE), who was an attorney, to oversee and coordinate the pilot launch. The pilot project director was supported by NLSP's executive director and an internal project manager. In May 2024, 2 full-time DCRB navigators (non-attorneys) were hired and began training. Navigators received training in the substantive legal areas involved in the pilot launch (e.g., child custody, child support, divorce), the DCRB system functionality and workflow protocols, and a range of other important topics such as domestic violence, trauma-informed principles, racial equity, client sensitivity, and how to assist callers with mental health issues or suicidal ideation.

Pilot partner organizations. A total of 9 legal services providers that handle family law cases, and that are funded by DCBF, participated in the pilot launch. All partnering organizations received training on the technology platform. During the pilot period, half of these organizations encountered issues with low staffing and limited internal capacity for family law cases, which caused them to opt out of receiving any DCRB referrals. All but one of these low-capacity organizations continued to attend the pilot meetings and engage in discussions related to the DCRB (one provider dropped out of participation altogether). Throughout the pilot launch period, 4 providers received referrals from the DCRB (notably, a majority of referrals were fielded by 2 of these organizations).

Time Frame

The pilot launch began on June 24, 2024. For the first 2 weeks, the DCRB was tested using hypothetical cases. The pilot project director created 26 fake applicants with case information that would require different referrals. The DCRB navigators fielded these applications, running them through the DCRB platform to familiarize themselves with the system functionality and to identify any glitches, bugs, or necessary improvements before going live. On July 8, 2024, the DCRB pilot launch went live, and the navigators began accepting applications for real DC residents.

DC Resource Bridge Coordinated Intake and Referral Process

The coordinated intake and referral process implemented during the pilot launch involved 3 main steps: (1) DCRB navigators complete the intake screening, (2) eligible applicants are referred to an appropriate legal services provider, and (3) cases are placed with an organization that will provide services. Exhibit 4 (next page) illustrates this process.

The reader should note that, during the pilot launch, people seeking legal assistance (“applicants”) were routed to the DCRB from staff at legal services providers (people they could not assist), the DC Superior Court Family Law Self Help Center, and social service providers. In all cases, staff from the referring organization would fill out an online intake form and send it to the DCRB navigators, who would then follow up with the applicant to conduct an intake screening. The DCRB contact information was not published in the community during the pilot, so residents could not yet self-refer.⁸

1. DCRB Intake Screening

When the DCRB receives an application, a navigator contacts the applicant within 2 business days to conduct a brief *intake screening* (not a full legal intake) to determine eligibility for services and obtain the necessary information to refer the applicant to a provider that can help them. The screening process gathers contact information, basic facts about the legal issue, and demographic information to assess eligibility for services by different organizations (e.g., income, age, ethnicity).

If the applicant is eligible for services, a referral is initiated (see step 2). If the applicant is determined to be ineligible for services (e.g., not a legal issue, does not match income eligibility criteria of any provider), the navigator explains this to the applicant, provides information about other relevant community resources, and closes the case in the DCRB system.

2. Referral

If the applicant is eligible for services, the navigator initiates a referral to the legal services provider that best matches the applicant’s legal needs and circumstances and that has capacity to take the case. This organization is identified by the case routing algorithm in the DCRB system and then confirmed by the DCRB navigator.

⁸ When the DCRB is fully launched, applicants will be able to access the DCRB through one of three avenues: (1) calling the dedicated hotline, (2) completing an online application, or (3) being referred by an organization.

When the DCRB navigator initiates a referral to a legal services provider, that organization receives limited information about the applicant, only what is needed to conduct a conflict check. Upon receipt of the referral, that provider has 3 business days to conduct a conflict check to determine whether they will take the referral for further review.⁹ If there is a conflict, the case is sent back to the navigator for referral to another provider. If there is no conflict, then the provider takes the referral for further review. At this point, the provider receives the full set of information collected during the DCRB intake screening and the organization staff contacts the applicant to complete a full legal intake and make a service determination.

Importantly, when a provider “takes a referral for further review,” they are committing to assess the case—not committing to provide services. Therefore, the case stays open for the DCRB navigators, who continue to monitor the case until it is placed with an organization for services.

3. Case Placement

After the full legal intake is done, the legal services provider decides whether to accept the case. This decision is communicated to the DCRB navigator within 10 business days of taking the referral. If the case is accepted, the attorney will determine the level of legal service to provide to the applicant and services will begin. When the case acceptance is communicated, the navigator will close the case in the DCRB system. If the case is rejected by the legal services provider (e.g., full intake revealed ineligibility), then the case is sent back to the navigator for referral to another organization.

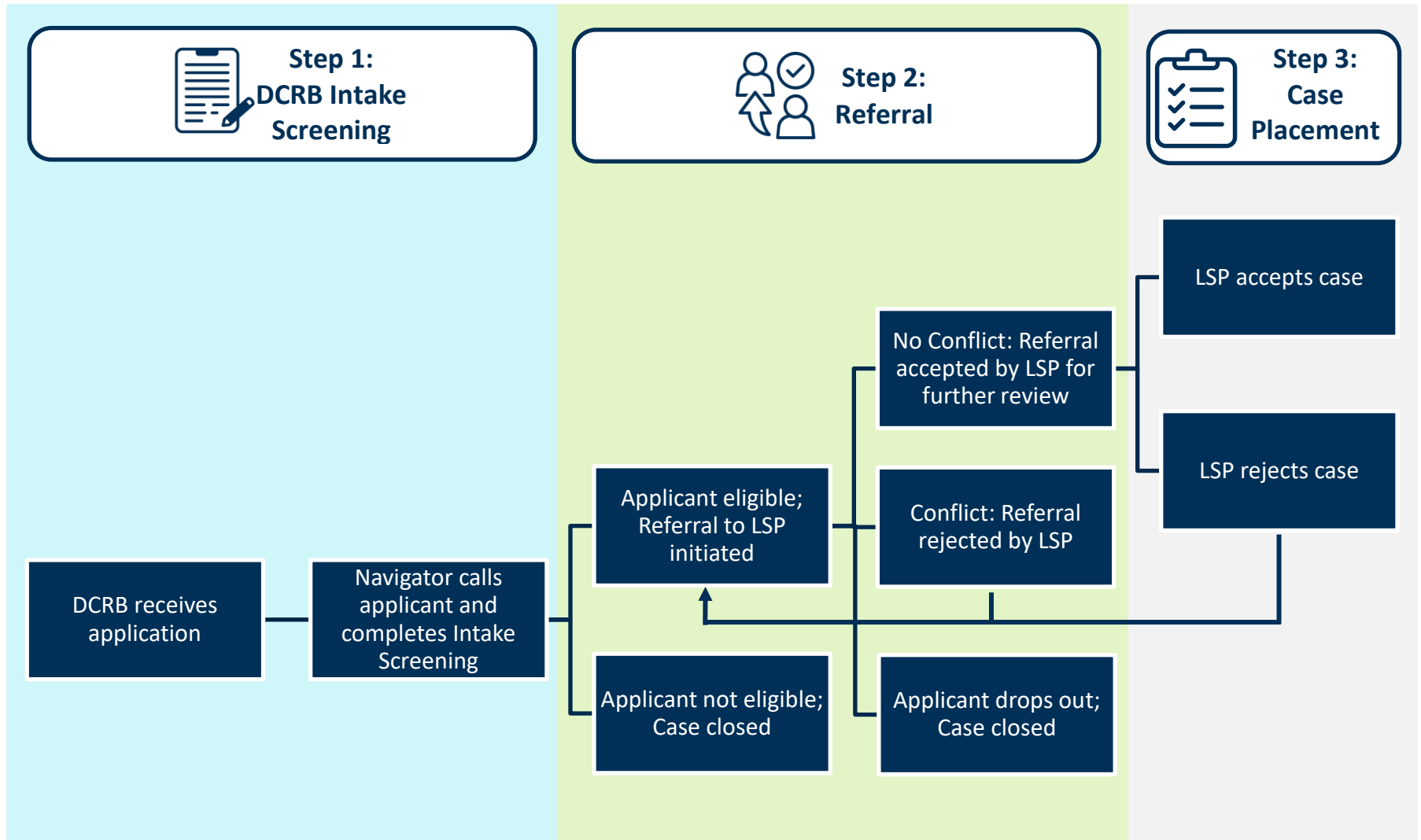
It is possible for an attorney to provide legal advice to the applicant during the process of conducting the full legal intake. If this occurs, and the attorney determines legal advice to be the full extent of services their organization can provide, the attorney will close the case and notify the DCRB navigator. If the applicant does not desire further assistance, the navigator will close the case in the DCRB system. If the applicant desires additional service, the navigator will refer the case to another provider.

Additional parameters:

Because multiple factors can impact a case rejection, the DCRB will refer an applicant twice for the same legal issue. That is, if an applicant’s case is rejected by one provider, the navigators will refer the case to another organization. (Referral rejections due to conflicts are not counted toward this total.) If the applicant’s case is rejected by the second organization, the navigators will refer the applicant to available legal information and self-help materials and will close the case in the DCRB system. If the applicant calls back to the DCRB at a later date for the same legal issue, the navigators will assess whether there has been substantive change in the case facts or applicant circumstances. If so, they will initiate another referral.

⁹ The legal services organization can also reject a referral for prima facie reasons within 5 days.

Exhibit 4. DCRB Coordinated Intake and Referral Process Steps



THIS STUDY

The goal of the pilot launch was to test the DC Resource Bridge’s workflows and technology platform in a limited-scope, real-world environment. The goal of the evaluation was to systematically collect data throughout the pilot launch to learn about the limited-scope implementation and use this information to support the full-scale launch of the DCRB.

Main Study Questions

The pilot evaluation assessed whether the DCRB operated as planned, what worked well, what challenges were encountered, and what, if any, modifications are needed to improve operations. This inquiry reviewed the utility of the technology platform, efficiency of the workflows, and effectiveness of the protocols that guided operations. Importantly, the study also sought to surface considerations for the DCRB’s full launch. Three study questions guided this analysis:

- 1) Is the DCRB (technology platform and workflow) operating as intended?
- 2) What is working well? What can be improved and how?
- 3) What potential challenges might the DCRB face as it expands to include other areas of law and more providers? What would support successful expansion?

Methods & Data Sources

To address these questions, the evaluation gathered data from multiple sources:

- 1) **DCRB system data:** Data from the DCRB system were de-identified, exported, and analyzed to assess who had been served by the DCRB, how they had been helped, and the extent to which the actual intake and referral processes aligned with the planned protocols.
- 2) **Focus groups with DCRB staff:** Focus group discussions were conducted with DCRB staff, including the navigators and the pilot project director.
- 3) **Focus groups with pilot partners:** Focus group discussions were conducted with staff from the legal services providers that participated in the pilot launch. Also, notes from the weekly meetings of pilot partners were reviewed and summarized.

This Report

This report presents the results of the pilot launch evaluation and offers key learnings to support the refinement of the DC Resource Bridge for full launch. The sections illustrate the DCRB operations as per an analysis of data from the system itself and summarize the feedback provided by DCRB staff and pilot partner organizations, ending with a list of suggestions for improvement and recommendations to support the full launch.

DC RESOURCE BRIDGE SYSTEM DATA

Data in this section reflect applicants who connected with the DC Resource Bridge from the start of the pilot on July 8, 2024, through December 10, 2024.

STEP 1: INTAKE SCREENING

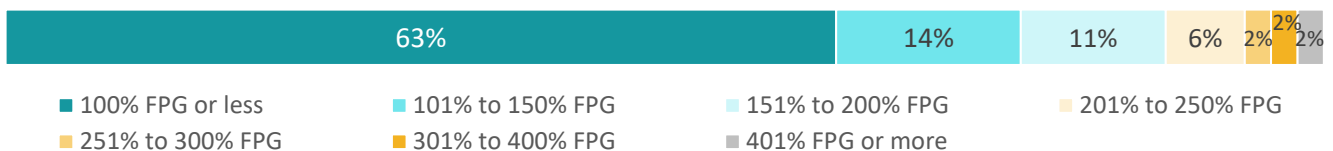
In the first 5 months of pilot operations, the DCRB received inquiries from a total of 127 applicants seeking a referral for legal services. These applications came from the DC Superior Court Family Law Self-Help Center, legal services providers, and social service organizations.

Applicant Characteristics

Demographic characteristics. Among the 127 applicants, roughly half (48%) were women, more than three-quarters (81%) identified as Black or African American, and most (59%) were between 31 and 59 years old. Exhibit A-1 in the appendix shows a full accounting of applicant demographic characteristics.

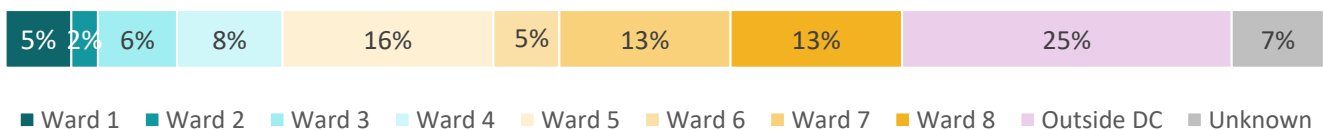
Household income. Household income reported by DCRB applicants was very low. As shown in Exhibit 5, 63% of applicants had a household income at or below the Federal Poverty Guidelines (FPG). Another quarter (25%) of applicants had a household income between 101% and 200% FPG.

Exhibit 5. Applicant Household Income



Ward of residence. As seen in Exhibit 6, applicants lived in all District Wards, though there were higher concentrations of applicants in Wards 5 (16%), 7 (13%), and 8 (13%). One quarter (25%) of applicants lived outside of the District (all but 2 were Maryland residents).¹⁰ In 7% of cases, the applicant was found to be ineligible from an earlier screening question and so Ward information was not asked.

Exhibit 6. Applicant Ward of Residence



¹⁰ Maryland residents can be eligible for legal services when they have a family law case filed in DC Superior Court. Court filing data for 2024 indicate that 29% family law cases (including dissolution, child custody and child support) involved one party residing in Maryland.

Presenting Legal Issues Among Applicants

The 127 applicants presented with a range of family law issues. Nearly half (46%) sought legal help for a parental custody matter and 40% sought assistance for a child support matter (29% were defensive and 11% were for the custodial parent). Smaller numbers of applicants were looking for legal services regarding other family law issues, including divorce (7%), establishment of parentage (3%), third party custody (3%), and appeal of a child custody order (2%). All percentages are displayed in Exhibit 7. It was possible for applicants to present with more than one legal issue during the intake screening, and this was true for 14 (11%) applicants.

Exhibit 7. Number of Applicants Presenting with Each Legal Issue

	# (%)
Parental custody	58 (46%)
Child support defense	37 (29%)
Child support custodial parent	14 (11%)
Divorce	9 (7%)
Paternity/parentage	4 (3%)
Third party custody	4 (3%)
Child custody appeal	2 (2%)
Custodial power of attorney	1 (1%)
Legal separation	1 (1%)
Missing	7 (6%)

Note. Percentages do not sum to 100% because applicants could have more than one issue. This information was missing for 7 applicants who were determined to be ineligible for services from their answer to an earlier screening question, so legal issue was not asked.

Four applicants, not shown above, sought assistance with a civil protection order (2 petitioners and 2 respondents). These applicants were referred to the DCRB in error, because the pilot launch did not address domestic violence cases. Navigators provided legal information and other resources, but did not initiate DCRB referrals for these cases.

STEP 2: REFERRAL

Number of Cases Closed by Navigators and Reason for Closure

At the time of this report, DCRB navigators had closed the cases for 122 (96%) of the 127 total applicants, indicating that the navigators had completed the intake and referral work for these cases. The other 5 applicants were still moving through the DCRB intake and referral process (i.e., their cases considered “open” by navigators). The remainder of this section focuses on the 122 closed cases because the data for these cases is complete.

Among the 122 applicants whose cases were closed by the DCRB, 85 (70%) were deemed eligible for a referral to a legal services provider (Exhibit 8, rows a, b, c). Fifteen (13%) applicants were ineligible for a referral, most often because they had a legal issue not covered by the partnering providers or were over-income for all partnering providers. An additional 12 (9%) applicants had their cases closed because they did not respond to the navigator or the legal services provider to which they had been referred, or because they withdrew their request for assistance.

Exhibit 8. Status of Cases with DCRB Navigators

DCRB Status of Case (at the time of this report)	# (%)
Closed (DCRB work complete)	122 (96%)
Open (DCRB work in process)	5 (4%)
If closed by DCRB navigator, reason:	
(a) Applicant placed with LSP for services	51 (42%)
(b) Applicant received legal advice during LSP intake interview and then case closed	8 (7%)
(c) Applicant eligible but not able to place with LSP	26 (21%)
(d) No referral initiated because applicant ineligible — over income	3 (3%)
(e) No referral initiated because applicant ineligible — issue not addressed by LSPs	9 (7%)
(f) No referral initiated because applicant ineligible — not a legal issue	0 (0%)
(g) No referral initiated because applicant ineligible — not in jurisdiction	1 (1%)
(h) No referral initiated because applicant ineligible — other reason	2 (2%)
(i) No referral initiated due to applicant non-response	5 (4%)
(j) No referral initiated due to applicant withdrawing request for assistance	4 (3%)
(k) Referral initiated, but applicant did not respond to LSP	3 (2%)
(l) Repeat applicant	8 (7%)
(m) Another reason	2 (2%)

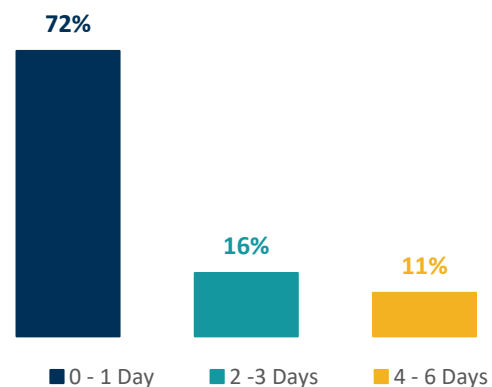
Also shown in Exhibit 8, the navigators closed the cases of 8 (7%) applicants because they had already contacted the DCRB for assistance with the same legal issue. These “repeat applicants” tended to reflect two general circumstances: (1) Some of them had referrals pending with the DCRB, but as they waited for response, they proactively reached out to another legal services provider which then rerouted them to the DCRB; and (2) Others had been denied legal assistance on their first DCRB contact (i.e., legal services providers had either rejected the case or provided brief services and closed it), and during the second intake screening, the navigators determined that there had not been substantive changes to the case to warrant a new referral.

Referral Response Time

DCRB protocols outline that, once a legal services provider receives a referral from a navigator, they will run a conflict check and accept/reject the referral within 3 business days. Data indicate that providers are generally able to meet this timeline. As shown in Exhibit 9, across all 140 referrals initiated by navigators, providers responded to 88% of them within the 3-day time period. In fact, 72% of referrals had a response within a day (see Exhibit A-2 in the appendix for full counts).

The evaluation team calculated the time between the day on which the navigator initiated the referral and the day on which the legal services provider responded to the referral request. On average, providers responded to a referral request in 1.1 days (range = 0-6 days, median= 0¹¹). The time to respond did not vary by referral outcome. Specifically, when the legal services provider accepted the referral for further review, it took an average of 1.2 days (range = 0-6). When the provider rejected a referral due to a conflict, it took an average of 1 day (range = 0-4).

Exhibit 9. Days between Referral Initiation and Referral Response



Note. Calculated across all 140 referrals initiated.

Referral Appropriateness

The DCRB is designed to route cases to the specific legal services providers that can handle them, and data suggest that the system was accomplishing this goal during the pilot. When responding to a referral request, legal services providers were asked whether the referred case was appropriate for their organization. Across the 140 referrals that were initiated (regardless of their outcome), providers indicated that 110 (79%) of them were appropriate and only 9 (6%) were not. (The remaining 21 referrals were missing this information.)

¹¹ “0” days means that the provider responded to the referral request on the same day it was initiated by the navigator.

Referral Response Rates

Across the 85 closed cases with eligible applicants, navigators initiated a total of 140 referrals. Some of these applicants had their case referred to more than one legal services provider: 37 (44%) cases closed after 1 referral, 41 (48%) cases closed after 2 referrals, and 7 (8%) cases closed after 3 referrals. (A third referral was permitted when applicants were conflicted out of one or both of the standard 2 referrals.)

Exhibit 10 shows the number of referrals initiated and their response rates. Overall, roughly 1 in 7 referrals was conflicted out. Of the 85 initial referrals, 14% were rejected by the legal services provider because of a conflict and the other 86% were taken for further review. Rates were similar on second referrals, where 15% were rejected due to conflict and 85% were taken for further review. *Importantly, taking a referral for a further review does not mean that the provider accepts the case.* When a referral is “taken for further review,” it means that the legal services provider will contact the applicant to conduct a full legal intake to confirm service eligibility and determine whether they can provide services (and what type).

Exhibit 10. Referral Responses Among Closed Cases

	Referral #1 # (%)	Referral #2 # (%)	Referral #3 # (%)	All Referrals
<i>Total number of cases</i>	85	48	7	85
Total referrals initiated	85 (100%)	48 (100%)	7 (100%)	140 (100%)
Referrals rejected by LSP due to a conflict	12 (14%)	7 (15%)	2 (29%)	21 (15%)
Referrals taken by LSP for further review	73 (86%)	41 (85%)	5 (71%)	119 (85%)

STEP 3: CASE PLACEMENT

This section shows data for the applicants whose cases, after being referred by the navigators, were “taken for further review” by legal services providers (see Exhibit 10 above). As shown in Exhibit 11 (next page), of the 85 applicants who were referred for services, 51 (60%) ultimately had their case accepted by a legal services provider: 32 cases were accepted on the first referral, 15 on the second, and 4 on the third. Exhibit 13 further illustrates the varying paths a referral can take.

Of the 85 applicants who were referred for services, 51 (60%) ultimately had their case accepted by a legal services provider.

Legal Services Provider Decisions

When legal services providers took a referral for further review, they ended up accepting the case for services a little less than half the time (44% of first referrals, 37% of second referrals) and rejecting it about half the time (44% of first referrals, 56% of second referrals). In a small number of instances, the attorney provided legal advice to the applicant during the legal intake interview and then closed the case, either because the applicant did not require further assistance or because the organization was unable to provide more. Exhibit 11 on the next page shows the number of cases accepted and rejected (and the reason for rejection) for first, second, and third referrals.

When cases were rejected, it was most often because the applicant had already contacted the legal services provider not through the DCRB. This issue was more likely to occur during the pilot launch, because applicants did not know about or directly contact the DCRB; they were referred to the DCRB by legal services providers (or court staff) who could not serve them. Because of this, the applicants may not have understood the role of the DCRB in the provider community or that the DCRB was not just another legal services provider, and therefore they would call additional organizations. Once the DCRB is fully launched and well-advertised in the community, and District residents become familiar with its role as a coordinated intake hub, the number of applicants who call individual providers after calling the DCRB is expected to decrease.

Legal services providers also rejected cases when, during their full intake, they discovered a conflict or that the applicant was ineligible for their services. It is important to note that these rates are relatively low (12 cases total), suggesting that the DCRB’s case routing logic is effective.

Providers also rejected cases that they determined to be outside of their organization’s priorities or for which they did not have sufficient resources to achieve the applicant’s goals (9 cases in total). The latter reasoning tended to apply to cases in which the attorney felt that the applicant had unrealistic or unreasonable expectations for case outcomes or level of services and consultation did not result in adjusted goals. Lastly, cases were rejected when applicants declined services or did not respond to communications, which applied to few applicants (7 in total).

Exhibit 11 shows that 10 cases were rejected by legal services providers due to capacity. While some of these entries reflect the quickly changing capacity of legal services providers, most were entered errantly. The DCRB system has a toggle button that allows providers to turn on/off their ability to accept new referrals. When they have no capacity for new cases, providers can toggle this button to “off” and the DCRB will not route referrals to them. One pilot partner was unaware of this functionality for a short period of time and therefore received referrals when there was no capacity to take them.

Exhibit 11. Case Placement Decisions by Legal Services Providers

	Referral #1 # (%)	Referral #2 # (%)	Referral #3 # (%)
<i>Total number of cases</i>	85	48	7
Number of referrals taken for further review	73	41	5
Number of cases accepted for services	32 (44%)	15 (37%)	4 (80%)
Number of cases given advice during intake interview and closed by provider ^a	9 (12%)	3 (7%)	0 (0%)
Number of cases rejected (no services provided)	32 (44%)	23 (56%)	1 (20%)
If case was rejected, reason:			
Client has already contacted provider through other channels	7 (22%)	5 (22%)	0 (0%)
Client ineligible	2 (6%)	5 (22%)	0 (0%)
Conflict	4 (13%)	1 (4%)	0 (0%)
Outside of provider organization’s priorities	4 (13%)	1 (4%)	0 (0%)
Insufficient organizational resources to achieve client’s goals	2 (6%)	2 (9%)	0 (0%)
Client declined services	1 (3%)	3 (13%)	0 (0%)
Client did not respond to communication; intake not complete	1 (3%)	2 (9%)	0 (0%)
No capacity	6 (19%)	3 (13%)	1 (100%)
Another reason	5 (16%)	1 (4%)	0 (0%)

Note. Each case is only accepted for services once, so the reader can add across that row for a total of unique cases placed (a total of 51 cases were accepted for services). However, a case can be rejected or given advice more than once, so adding across these rows will result in duplicated counts.

The number of cases with a second (and third) referral includes a combination of applicants who were conflicted out of their first referral (not shown in table), applicants who were rejected for services on their first referral, and applicants who received advice on their first referral but wanted more assistance.

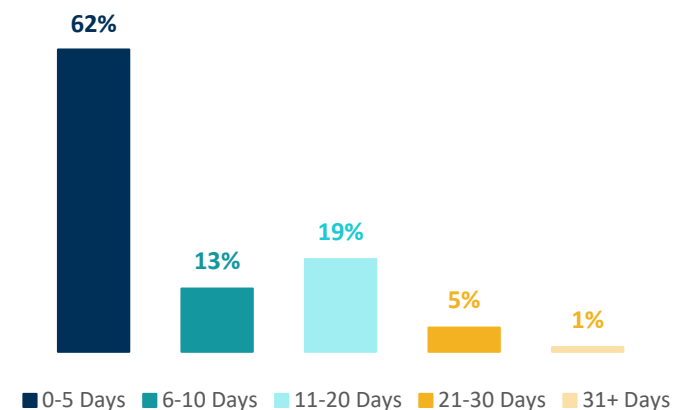
^aSome of these cases were closed by the navigator after the first referral (i.e., the advice was sufficient for the applicant) and some of these cases were referred again (i.e., the applicant wanted further assistance).

Case Placement Response Time

DCRB protocols dictate that, once a legal services provider takes a referral for further review, they will make a case placement decision within 10 business days. Analysis of DCRB system data indicate that providers are generally able to meet this turnaround time. Across the 119 referrals that were taken for further review, the evaluation team calculated the time between the day on which the organization took the referral and the day on which they responded with a decision to accept or reject the case. On average, legal services providers responded with a case placement decision 5.6 calendar days after taking the referral for further review (range = 0-44 days, median = 1 day). For the 51 referrals that ended in case acceptance, providers took an average of 5.7 days to decide (range = 0-26, median = 2). For the 56 referrals that ended in case rejection, providers took an average of 3.3 days to decide (range = 0-44, median = 0). For the 12 referrals that ended with the organization providing advice during the intake and then closing the case, providers took an average of 15.6 days to communicate their decision to the navigators (range = 4-28, median = 15).

Exhibit 12 shows a breakdown of the number of days taken by legal services providers to make a case placement decision about an active referral. Notably, for 75% of referrals, providers met the 10-day turnaround timeline—in fact, for 62% of referrals, providers responded with a case placement decision within 5 calendar days (more than 50% responded within 1 day). In 25% of referrals, providers required more than 10 days to determine case acceptance. An additional 19% of case placement decisions were made between 11 and 20 days after taking the referral, 5% were decided between 21 and 30 days after taking the referral, and 1% took more than 31 days.

Exhibit 12. Days between Referral Acceptance and Case Placement Decision



Note. Calculated across all 119 referrals taken for further review.

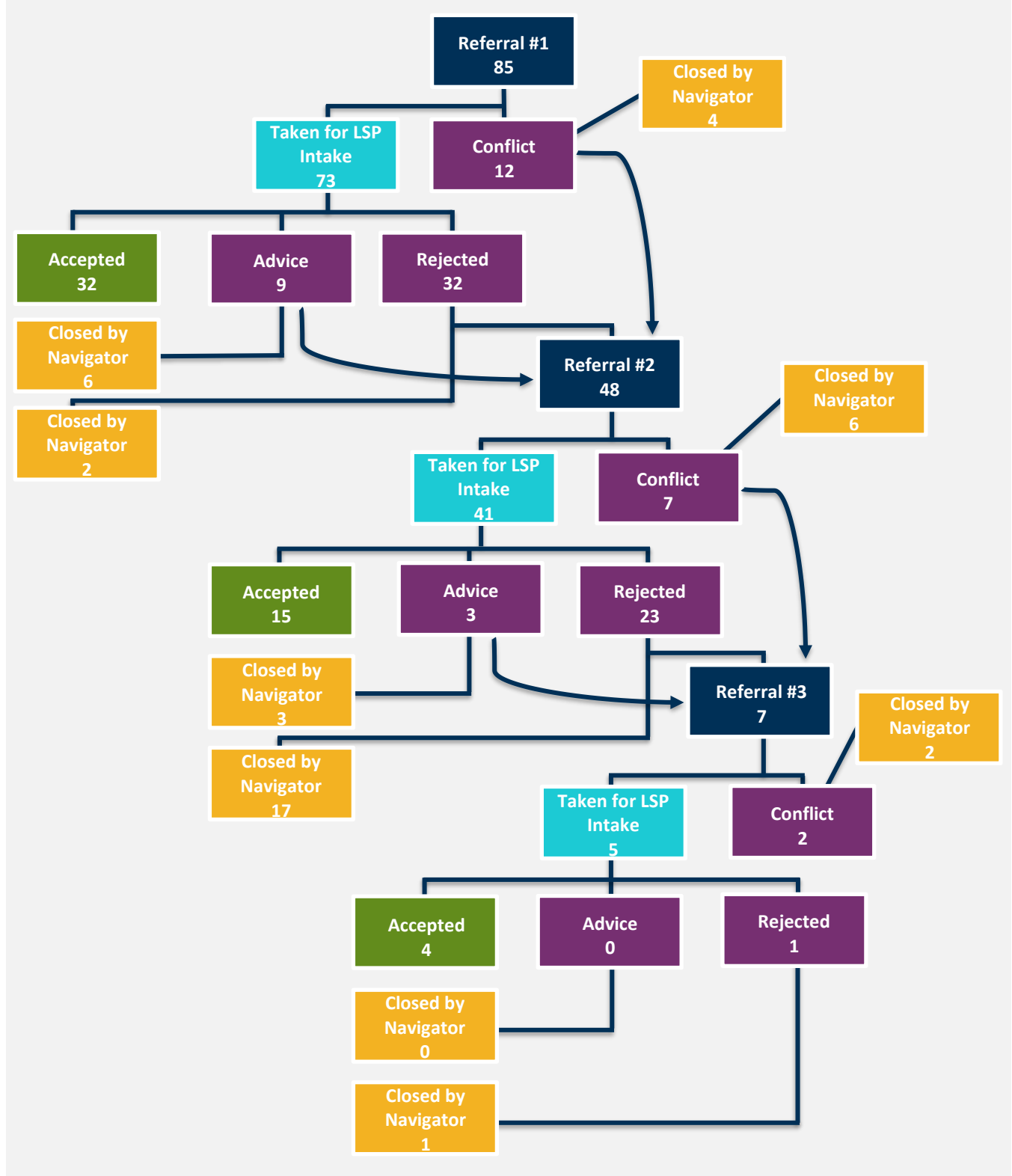
REFERRAL AND CASE PLACEMENT CAN BE NON-LINEAR

The linear process outlined in the DCRB protocols (see Exhibit 4) was well-founded, as the majority of DCRB referrals followed this expected pattern. However, as with most theoretical designs, DCRB referral activity was often more complicated in practice. This complexity is the reason why the DCRB cannot be a fully automated, technological system—it needs the human touch of the navigators not only to ensure that services are trauma-informed, but also to facilitate referrals that do not conform to pre-ordained or linear models. Exhibit 13, on the following page, illustrates the various pathways that the 85 applicants with closed cases took through the DCRB system. The following section describes these pathways and outcomes.

Among the first referrals of the 85 applicants, 73 (86%) were taken by the legal services provider for further review and 12 (14%) were rejected due to a conflict. Of the 73 referrals that were taken for further review, 32 (44%) cases were accepted for services, 32 (44%) cases were rejected, and 9 (12%) cases involved advice given by the attorney during the full intake interview and then closed by the provider. The navigators formally closed 4 of the cases with conflicts, 6 of the cases that had received advice, and 2 of the cases that were rejected for services. (Note that navigators can close cases when, for example, applicants stop responding to calls or withdraw their request for assistance.) A total of 48 applicants (including some whose first referral involved a conflict, some who received advice on their first referral but wanted more assistance, and some whose first referral resulted in a rejection) were referred to a second legal services provider.

Among the second referrals of these 48 applicants, 41 (85%) were taken by the legal services provider for further review and 7 (15%) were rejected due to a conflict. Of the 41 referrals taken for further review, 15 (37%) cases were accepted for services, 23 (56%) cases were rejected, and 3 (7%) cases were given advice and closed by the providers. The navigators closed 6 of the cases with conflicts, 3 of the cases that had received advice, and 17 of the cases that were rejected for services a second time. A total of 7 applicants were given a third referral because they had been conflicted out of one or both of their previous referrals. Of these, 5 referrals were taken for further review and 2 were rejected due to conflicts. Of the 5 referrals taken for further review, 4 cases were accepted for services and 1 was rejected.

Exhibit 13. DC Resource Bridge Referral and Case Placement Activity



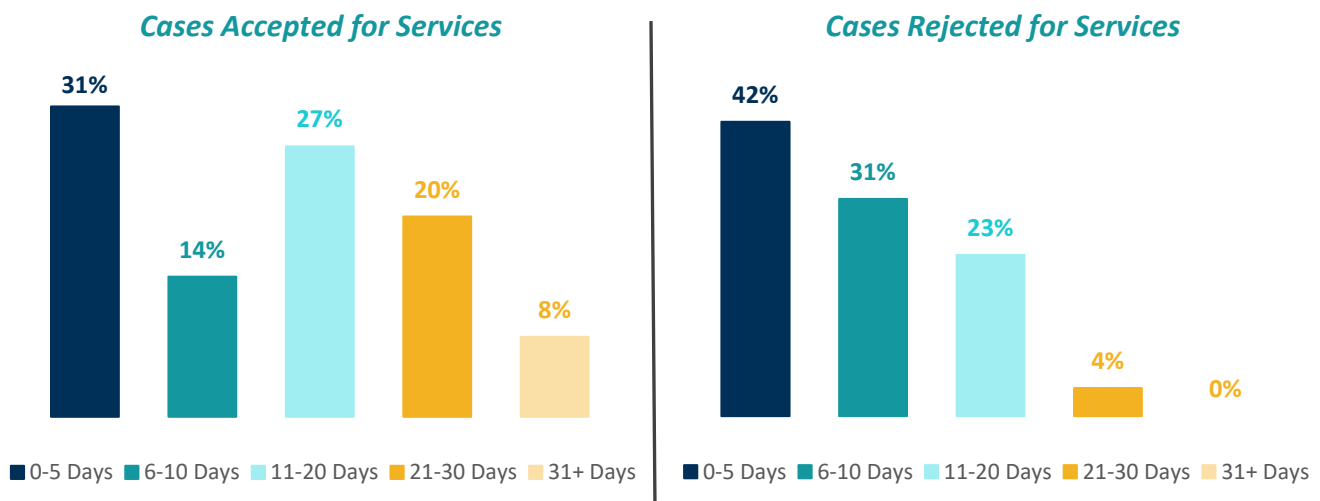
OVERALL DC RESOURCE BRIDGE PROCESS

Time from Intake Screening to Case Placement Decision

To assess the time that elapses for applicants going through the DCRB process, the evaluation team calculated the time between the day on which the navigator completed the intake screening and the day on which the navigator closed the case. **On average, across the 85 cases that had a referral initiated, the DCRB took 12.7 days (range = 0-57, median = 10) to screen, refer, and place (or deny) a case.** The time to complete the process varied across applicants, depending on the outcomes of their referrals. In particular:

- **Among the applicants whose cases were ultimately accepted for services, the DCRB process took an average of 14.8 days** (range = 0-57, median = 14).
 - For the applicants whose case was accepted on the first referral, it took an average of 10.5 days (range = 0-28, median = 7).
 - For applicants whose case was accepted after multiple referrals, it took an average of 19.7 days (range = 0-57, median = 15).
- **Among the applicants who were eligible, but whose case was not able to be placed for services, the DCRB process took an average of 7.7 days** (range = 0-26, median = 6). Across these 26 applicants, 6 had one referral, 18 had two referrals and 2 had three referrals.

Exhibit 14. Time between DCRB Intake Screening and DCRB Case Closure



DC RESOURCE BRIDGE STAFF & PILOT PARTNER PERSPECTIVES

This section summarizes what was learned during focus groups with DCRB staff, including the 2 navigators and the pilot project director, and with staff from 7 of the legal services providers that participated in the pilot launch (“partners”). Among the pilot partners, 3 organizations received the majority of referrals, so staff from these organizations answered additional questions about specific aspects of the referral and case acceptance process.

DCRB STAFF PERSPECTIVES

Navigators and the pilot project director (collectively “DCRB staff”) were asked about aspects of the DCRB workflow and technological platform, what worked well, any challenges that they encountered during the pilot or forecasted for full launch, and any suggestions for system improvement.

Technology Platform

All DCRB staff agreed that the **technology platform was well-built, user-friendly, and easy to use**. They reported encountering very few issues during the pilot period. When they did, functionality issues were addressed quickly by the technology consultant and content-related issues (e.g., adding fields or revising drop-down menus) were logged and tracked for ongoing system enhancement. One navigator specifically touted the platform’s ability to generate appropriate referrals (i.e., that the case routing logic was effective), noting that this capability was helpful during the pilot project and will be even more critical as the DCRB expands to include multiple areas of law.

Intake Screening

Strengths

Staff felt that the DCRB intake screening process was effective. They reported that the **screening interview was easy** to conduct with applicants and generally proceeded smoothly. However, they noted that the interview process was shortened during the pilot launch (lasting 15-20 minutes on average) because the online referral form provided a substantial amount of information that the navigators otherwise would have had to ask applicants. (Recall that the pilot launch only accepted applications from the Court Family Law Self-Help Center, legal services providers, and social service providers who submitted applications to the DCRB system via an online form).

Navigators felt that the intake screening protocol was **sufficient to accurately assess the applicant’s legal issue**. They highlighted that this was aided by the pilot being limited in scope to certain family law cases, so the range of relevant information to collect was relatively narrow. They also noted that,

because the case volume during the pilot period remained low, they were able to connect with applicants quickly (often the same day as they were referred to the DCRB), which meant that the applicants had the relevant information for intake readily available. Easy accessibility of the related court documents (e.g., docket, filings) also helped. When asked about the intake screening protocol timelines (the protocol specifies that navigators will contact the applicant within 2 days), staff stated that this timeline was easy for the pilot launch because the case volume was very manageable.

Current and Potential Challenges

Though the intake screening interview generally proceeded smoothly, DCRB staff mentioned that **some applicants were apprehensive to share certain information**, such as their household income (needed for eligibility assessment) or who they live with (needed for conflict check). When this occurred, which was relatively rare, navigators would explain the reasons why the information is necessary and how it will be used (to connect them with a service provider that matches their needs). One staff said, “When they aren’t ready to give us the information that we need for a referral, I don’t push. I just tell them that they can call us back when they are ready because we can’t do a referral without it.”

Staff noted that the DCRB must be able to **accommodate applicants with urgent needs**. While they felt able to surface these needs during the screening interview, they were not convinced that these needs were sufficiently handled in the technological platform or DCRB protocols. Staff wanted a way to flag these cases in the system to fast-track their referral and case placement process, as well as a specified protocol to outline the review and response timelines for fast-tracked cases.

While staff felt that the intake screening protocol gave navigators sufficient information to identify the applicant’s legal issue during the pilot launch, they noted that this will become more difficult to do as the DCRB expands to include other areas of law. Navigators underscored that the **expanded screening protocols must be very clear** to support their ability to know exactly which questions to ask to get the information needed for different case types. They also saw a need for training on new areas of law as the DCRB expands. One navigator said that it would be helpful to have “more substantial training on what information I need to make the calculation on the specific legal issue.”

Suggestion:
Create a flag in the DCRB system to fast-track cases with urgent needs and a specific protocol to govern an expedited referral process

It is likely that **intake screenings will take longer as the DCRB grows**. As noted above, the screening interview during the pilot launch was artificially shortened due to the online referral form and the single area of law. When asked about the full launch of the DCRB, staff underscored that an intake screening interview that starts with a cold call will take more time to complete. Moreover, applicants may have intersecting legal issues in different areas of law, which will lengthen the number of questions that will need to be asked to accurately route the case. It is important to note that, while DCRB expansion will lengthen the time necessary for intake screening, it will also increase the navigators’ caseloads, raising questions about adequate navigator FTE.

When discussing the DCRB intake screening generally, staff expressed a need for consistency between the DCRB and participating legal services providers. Specifically, during the pilot, staff sensed a **lack of agreement among partners about the extent of information gathered by the DCRB intake screening process**. Some partners thought it should be a brief screening that gathered just basic information, whereas others had expectations for a fuller intake assessment. DCRB staff aimed to balance the details needed for an appropriate referral with applicant burden, and they understood that this balance was difficult to strike perfectly. Broader agreement among the partnering organizations would help align expectations and clarify the best protocol.

Ensuring Applicants Feel Heard

Strengths

When asked how they ensured that applicants felt heard and valued throughout the DCRB process, navigators highlighted the **importance of active listening**—in particular, allowing applicants to share their stories and their concerns and to have those experiences heard and affirmed by the navigator, even if doing so meant spending more time on the call. Navigators thought that this approach helped applicants feel more comfortable and more supported, and also set a collaborative tone for the remainder of the DCRB process. One said, “Even if we can’t [place the case], they are more understanding that I have done everything in my power to help them.”

Navigators also strive to **be accessible and helpful**, a genuine effort to be a reliable resource for residents. One navigator stated, “After the screening interview is done, we tell [applicants] that they can always reach out to us with any questions or concerns, and we check voicemails often to make sure that we don’t miss anyone.” They described that some applicants have taken them up on this offer. For instance, a couple applicants have called back after their case was closed and the navigators have responded and provided them with information about other community resources. As one navigator said, “Sometimes we have people text or call again after we can’t help them. We try to hear them out and validate their experience.”

Lastly, navigators mentioned the **importance of clear and consistent communication**. During the intake screening interview, they clearly explain the referral process and what the applicant can expect. Importantly, they also actively follow up with applicants at each juncture in the referral process to make sure they know what is happening and that their case is still being worked on—ensuring that applicants know they are not forgotten, even if the process is taking longer than anticipated. Navigators’ ability to maintain communicate clearly, consistently, and frequently with applicants was strongly supported by the DCRB system’s text messaging functionality.

Current and Potential Challenges

Staff did not mention any current challenges with helping applicants feel heard and valued. However, they noted that navigators have been able to attend so thoroughly to this aspect of their job because the intake volume during the pilot has been relatively low, which has given them enough time. As

described above, implementing a client-centered and trauma-informed approach takes more time—there are more calls with applicants and the calls generally last longer. Staff underscored that, as the DCRB grows, sustaining this level of applicant support will require increasing and maintaining sufficient navigator FTE. In short, for the DCRB to stay user-centered, it will be necessary to have adequate resources such that navigators never feel like they have to quickly rush off the phone with someone to help the next person in line.

Response Timelines and Related Communication

Strengths

DCRB staff agreed that the **response timelines in the protocols are appropriate** and that the providers are generally able to respond within the specified number of days. This is especially true for the referral step. Staff reported that, once they initiate a referral, the legal service staff nearly always complete a conflict check and accept/reject the referral within 3 business days. DCRB staff noted that the response timeline for case placement step (10 days) presents some challenges (see below).

DCRB staff also noted that, in general, **communication with the legal services partners is good**. The navigators strive to be available for and responsive to any inquiry from a partner, and the pilot project director felt that the regular meetings with the pilot partners provided a consistent space to address any relevant topics in a timely and collaborative manner. While overall communication has been good, the navigators reported that some types of communication—specifically about case placement decisions—presented some difficulty (see below).

Current and Potential Challenges

While response times for referrals (conflict checks) are quick, the **response times for case placement decisions are sometimes challenging**. DCRB staff estimated that legal services partners met the 10-day deadline a little more than half the time and required prompting (sometimes more than once) to communicate decisions for the other half. Navigators described the tension between, on one hand, feeling responsible to manage the full intake and referral process—importantly, tracking whether and how long an applicant waits for a response—and, on the other hand, having little to no authority to ensure that protocol timelines are enforced. They explained that not hearing back from a legal services provider about a case placement decision complicates their ability to provide clear and timely updates to an applicant about the status of their referral, which the protocol requires them to do.

When asked about their duties, navigators replied that following up with legal services organizations about pending cases was their most time-consuming task. They noted that the DCRB system generates automated reminder notifications of upcoming response deadlines, but they felt that these reminders were not always effective and that direct contact from a navigator was often necessary. One navigator said, “The automated notifications are too generic and easy to ignore because it is system generated. They can’t ignore us in the same way.” This dynamic caused concern for the navigators, who worried that their follow up efforts created stress for the legal aid staff. One navigator explained, “I worry that

it feels like we are badgering them, and that doesn't feel good. I don't want to create a wall or resentment between the DCRB and the legal aid providers. I want them to know we are an ally."

When asked about potential solutions, DCRB staff wondered what would support the legal services partners to meet the 10-day case placement decision timeline consistently. They stated that **providers need adequate resources**—including dedicated staff—to attend to these tasks as part of their existing operations. Staff also acknowledged that **the DCRB does not currently have an accountability mechanism** (i.e., a protocol for reviewing partners' compliance with the DCRB protocols and following up to ensure compliance) and wondered whether instituting such a mechanism would facilitate consistent implementation across partners and over time.

DCRB staff described **challenges discerning the status of a case between Step 2 (referral) and Step 3 (case placement)**.

In particular, once a legal services partner has taken a referral for further review, they have 10 days to conduct a full legal intake and decide whether they will accept or reject the case. During this time, it is difficult for the navigators to discern what, if any, progress has been made on the case (e.g., whether or not the provider has contacted the applicant, whether or not the full intake is done), because the DCRB

system does not have fields for the legal aid staff to indicate the completion of any of these in-between steps. This lack of information can cause confusion for the navigators, who are monitoring each applicant's referral process, and result in additional messages to legal services staff requesting updates. Moreover, the lack of intermediate fields caused some providers to use the "case accepted" field to indicate when they were actively assessing the case, causing different confusion for navigators who assumed the case was placed when it was not. DCRB staff agreed that having additional fields in the system for legal services partners to indicate "case under review" or "full intake completed" would facilitate better communication between navigators and legal aid staff and reduce the need for additional direct messaging.

Suggestion:
Add fields to the DCRB system that allow navigators to track the status of cases during the time between referral acceptance and case placement decision

Repeat Callers

Strengths

DCRB staff noted that, even within the short 5-month timeframe of the pilot launch, some applicants had connected with the DCRB or partner providers more than once. They saw this as an indication of the need for a coordinated intake platform to help streamline people's search for legal assistance and they were optimistic that, once the DCRB was fully launched and clearly advertised in the community, residents would understand the DCRB to be the sole point of contact needed.

Current and Potential Challenges

DCRB staff understood that repeat callers are a common occurrence for legal service providers. Navigators wondered **how the DCRB, with its network of multiple organizations, could best handle repeat applicants and those wanting additional services.** In particular, they wondered how the DCRB should handle applicants who have gone through the DCRB referral process and received advice or brief services from a provider, and then contact the DCRB again because they want full representation. Navigators underscored that the legal services partners have sole discretion regarding the level of service they provide to a DCRB-referred case, so the DCRB staff have no way to ensure that applicants will receive the level of service they desire. Further, given resource constraints and merit assessments, it is not possible for all applicants to receive full representation. Staff were unsure about how the DCRB could best manage this challenge. In the short-term, navigators want to be able to flag a repeat caller in the system and to be able to filter cases by applicant name to identify duplicative records.

Confidentiality

Strengths

When asked if they felt that the DCRB workflow **adequately protected applicant confidentiality**, staff thought that the release of limited information for the conflict check (and fuller information only after the legal services provider has agreed to do a full intake) was a strong protection in this regard. They also acknowledged the importance of having the DCRB remain independent of any organization's case management system, as was done in the pilot launch.

Current and Potential Challenges

While staff noted that the protocols for the DCRB intake screening and initial referral adequately protect applicant information, **challenges to confidentiality multiply with the number of referrals.** When a case involves multiple referrals, its record includes more information (e.g., which provider(s) have rejected the case and why), and it is unclear how much, if any, of that information should be shared with providers receiving the subsequent referrals. Staff underscored the importance of striking a balance between safeguarding applicant confidentiality (sharing little or no information) and minimizing applicant burden of repeated intake interviews (sharing all information). They thought that staffing a lawyer within the DCRB could help reduce these issues, because the lawyer could give quick legal advice to applicants, when appropriate, which would stem unnecessary legal services referrals and by extension, unnecessary information sharing. Staff also noted that the complexity of information sharing and confidentiality protection will increase as the system expands to include additional partner organizations and areas of law.

Important Considerations for the Full Launch

When asked about the full launch of the DCRB, staff underscored a few issues that have potentially critical implications for system expansion. They felt that these topics must be considered in the near term to lay the groundwork for the DCRB's longer-term success.

A successful and sustainable DC Resource Bridge will require:

- ❖ **Uniform understanding of purpose.** Staff sensed that members of the legal services community have varying ideas about what the DCRB should do, and they thought **it is essential for there to be a uniform understanding across providers regarding what the DCRB is and what it is not.** The result of this decision has direct impacts on resources, goals, and approaches undertaken by staff. For example, as one staff said, “Are we thinking that the navigators would connect with applicants once and not again? Or are we thinking of the DCRB as a consistent resource that [applicants] can connect with? Are we building an ongoing relationship?”
- ❖ **Clear model for leadership and governance.** Staff appreciated that the early stages of the DCRB development have been heavily driven by community input. DCBF employed a participatory approach that enabled the legal aid provider community to help shape system design and diffused decision making across collaborative teams. However, at the close of the pilot launch and on the edge of the full launch, when the management emphasis is shifting from design to operations, DCRB staff see a **distinct need for a clearer leadership structure and more clearly defined avenues for decision-making authority.** One staff asked, “Who is the decision maker? Who is responsible for putting together oversight? Right now, there is no one in charge. It has not been defined who is in charge.” Staff explained that, for the DCRB to succeed, a balance must be struck between, on one hand, being community-owned and collaboratively focused (this was underscored as a notable strength) and, on the other, needing a clear and transparent governance model so that decisions can be made fairly and implemented efficiently.
- ❖ **Unified orientation toward varying service levels.** DCRB staff saw a need for partners and administrators to consider and articulate a fundamental decision regarding service level. Specifically, the DCRB must have a clear definition of “service”—i.e., **what it means for someone to be “served” via DCRB case placement—and how that is communicated to applicants.** Staff highlighted that most legal services providers consider the provision of legal advice to be “service,” but many clients who receive advice do not feel as though they have been served adequately. This discrepancy has implications for applicant satisfaction, the rate of repeat callers, and DCRB communications. One staff member voiced a concern that the DCRB could inadvertently create a pipeline for brief services, which may not truly meet residents’ legal needs. This staff asked, “Is the goal of the DCRB to help people get connected to any level of service, even if that it just advice? Or is it to connect them with the level of service that they want or need?” All staff members agreed that there should be a systemwide decision about this issue, so that staff and partners can be oriented similarly and so that communications to residents can be consistent.

- ❖ **Clear expectations regarding participation.** Staff explained that, as the DCRB expands and more legal services organizations join, it will be **essential to clearly articulate what “DCRB participation” entails for providers and what they will be expected to do.** Before agreeing to participate, each organization should understand clearly the expectations, such as how much time their staff will dedicate to DCRB tasks on a weekly basis, response timelines for DCRB referrals and case placement decisions, approximate number of cases they will receive, and other collaborative duties (e.g., regular partner meetings, communications). Clearly defined participation expectations will help ensure consistency across partners and streamline implementation. DCRB staff also wanted legal services providers to know that the DCRB, and its staff, aims to be a resource and an ally for the legal aid community, and they hoped to be seen as a partner and an ally, not just an added responsibility.

PILOT PARTNER PERSPECTIVES

Staff from legal services providers that partnered in the pilot launch were asked about their experience working with the DCRB (both the technology platform and the navigators), including aspects of the DCRB what worked well and any challenges that they encountered during the pilot or predicted for the full launch. They also provided recommendations for improvement and advice for the organization that will serve as the host of the fully launched system.

Strengths and Positive Attributes

Pilot partners reported that participating in the **DCRB pilot launch was a positive experience.** They thought that the pilot project management was organized, communicative, and supportive. One partner said that the pilot host organization was “...diligent, timely, helpful. They were great.” Partners appreciated the regular check-in meetings, which made them feel connected to the project and other partners, provided useful updates on project progress, and afforded space to discuss challenges and potential solutions. They also expressed appreciation for the navigators and found them easy to work with. They described the navigators as accessible, responsive, communicative, and helpful, which made it easy to collaboratively handle any issues quickly.

Pilot partners highlighted the technology platform, calling it “fabulous” and “great.” They found the **platform to be user-friendly, easy to navigate, and well-organized** with the information necessary to screen for conflicts and process referrals efficiently. They underscored the value of being able to toggle their capacity for new referrals on/off as needed to match their organization’s shifting case volume and intake capacity. One partner, whose organization is open for intakes one week per month, found this functionality especially helpful.

Partners appreciated the ability to turn their capacity for new intakes on/off as needed.

Partners who had received DCRB-referred cases reported that **DCRB referrals folded into their existing intake workflow easily** and that no modifications to their internal protocols were necessary. They

were able to process DCRB referrals the same way they processed other intakes. In some cases, these callbacks were easier to do, because the DCRB intake screening form provided the legal aid intake staff with more information to start the conversation with the applicant.

Challenges and Considerations for System Refinement

Workflow and Response Timelines

While partners agreed that the general DCRB process fits into their existing intake workflow without the need for accommodation, a couple of partners noted that the expected **response timelines can be challenging, particularly for case placement decisions**. In short, for these providers, the DCRB requests a quicker turnaround time than their family law units typically process cases. These partners explained that they field intakes from several sources and that sometimes the intakes from other sources may have priority depending on the case facts or urgency. When this happens, it slows their response to navigators, sometimes beyond the required DCRB timelines. These partners acknowledged that this tension in referral prioritization is likely to persist, which might make the DCRB response timelines periodically untenable.

Because their response to DCRB referrals can sometimes move more slowly than the protocols dictate, partners agreed that navigators must **assess the urgency of applicants' needs during the intake screening** and that the DCRB system must include a flag to fast-track case placement for those with urgent needs. A couple of partners thought that such a flag is necessary but would not be sufficient for all circumstances and questioned whether a DCRB referral was the most appropriate course of action for urgent cases (they thought it was not). Instead, they suggested that navigators send applicants with urgent needs to the court-based or same-day projects that can meet those needs, like the Family Law Assistance Network (FLAN), the Child Support Resource Center (CSRC), or the Landlord-Tenant Legal Assistance Network (LTLAN). These projects could provide immediate assistance (e.g., help with a hearing in the short-term), and the applicant could come back to the DCRB when there was more time for the case review timeline to occur. Partners acknowledged that same-day services do not exist for all areas of law, so having a flag in the DCRB system to fast-track a referral is likely the best accommodation possible for certain types of cases.

Suggestions:
Ensure navigators assess case urgency. Create a flag to fast-track urgent cases. Enable navigators to refer applicants to court-based, same-day services when necessary.

Several partners explained that the case review timeline can sometimes lengthen because it takes several attempts to reach an applicant to complete the full legal intake. (This is the step after the partner has checked conflicts and accepted a referral but before they accept the case.) When this lag happens, it creates confusion with the navigators because there is no way for the partners to indicate that the case is actively under review and the navigators only see the lapsed time with no new information. One partner described a scenario when their organization was playing phone tag with the applicant, and the navigators pulled the case (thinking there was no activity on it and wanting to ensure the applicant got helped) and referred it to another organization at the same time, which caused confusion for the applicant. All partners agreed that the DCRB system should include a button for “case under review” or “full intake pending” so that the partners can signal to the navigators that they are actively working on completing the legal intake and moving toward a decision about case acceptance.

Suggestion:
Add a field to the DCRB system, between the conflict check and case acceptance, where partners can indicate that they are reviewing the case.

Repeat Clients

Within the same organization. Partners noted that the intake and **referral process was sometimes circular for applicants who were already helped** by one of the legal services providers. For example, the DCRB would route an applicant to an organization that, unbeknownst to the navigators, had already provided brief services to the applicant because they had contacted the organization directly. Upon receiving the referral from the DCRB, the organization would re-evaluate the case to see if anything had changed that would enable additional service provision (e.g., new case facts). This meant that the applicant went through the organization’s intake process again. Often, there were no substantive changes to the case facts or status, which meant that the applicant’s case was rejected by the organization and sent back to the DCRB. Partners hoped that this type of redundant loop could be avoided. As one said, “We don’t want people to go in a circle. It’s frustrating for clients.”

Partners noted that this type of redundancy will occur less often once the DCRB becomes the main entry point for legal services—that is, when District residents call the DCRB instead of calling providers directly. When residents use the DCRB as the primary access point, the navigators will have a record of the providers to which they have been referred and where they have been served in the past.

Until that point, partners thought that this problem could be addressed by having **the navigators ask applicants if they have contacted or been served by other legal services providers** for the same issue. One partner thought that it would help to offer a checklist of providers for applicants to review and check off, rather than having to remember the names, knowing that this format may work best for the online intake form. With this information, the navigators can make sure that applicants are

Suggestions:
Have navigators ask applicants if they have contacted other legal services providers directly, to avoid referring them to places they have already been.

not routed back to an organization who has already closed their case, unless it is clear that the case facts have changed.

Across organizations. Partners reported other instances in which an applicant’s service history from other providers (repeat clients within the larger referral network) was relevant to their case placement decisions. One partner described having to reject a DCRB-referred case because the applicant indicated that they had an attorney at another organization, only to discover later that the applicant had received brief services by an attorney at another organization but was not being represented by them. Another partner recalled a situation when an applicant indicated that they already had representation for their family law case, without understanding that they were receiving representation for the domestic violence matter, but not the custody case matter. These types of misinterpretations led to applicants being declined services that, in fact, they were eligible to receive. Partners explained that clients do not generally understand the nuances of legal services and their misinterpretations, when communicated to a provider during the intake process, can impact their receipt of additional services.

Partners agreed that knowing an applicant’s service history would support more accurate service decisions, although they were unsure about how this information could be shared across providers while still maintaining client confidentiality. They concluded that **providers should be able to share some limited information with each other.** As one partner said, “When a client doesn’t fully understand their legal issue or what services they have received, it’s hard for them to give us good information. It would be easier for the providers to talk directly to each other, but that is an ethics issue. How much information can we share?”

When they received a DCRB referral, partners wanted to know whether the applicant had already received services elsewhere and what type of services were provided, “so that there is no confusion whether someone is already represented when they are referred.” They also thought that provider-to-provider communication could facilitate the placement of cases that they could not accept. For example, one partner wanted to be able to message to other providers, “This is a strong case, but we can’t take it,” in a way that facilitates a direct handoff to the right organization to help the applicant. Another partner, hoping to spare applicants the frustration of serial advice, wanted to be able to message to other providers, “We’ve done everything we can to help this person. Only pick up the case if you can provide more than advice.” Another partner disagreed with this suggestion, saying that organizations should not explicitly note whether and how they have already served the applicant or provide any information that is not purely procedural or that would impact another provider’s service decision.

Suggestion:
Determine how much information providers can share with each other about clients previously served.

Beyond potential provider-to-provider information sharing, partners suggested that navigators get as much information as they can about applicants' previous service history during the DCRB intake screening. As described above, they thought that applicants could be asked "Have you been served by any of these organizations?" and given a checklist to choose from. If they indicate that they received services previously, the navigators should ask additional questions about the type of service received (using easy to understand descriptions, such as "Did you only talk to the lawyer over the phone?" "Did the lawyer go to court with you?") and the legal matter that the services addressed (relative to the legal matter that the applicant presents with during the DCRB intake screening). This information will help the navigator make a more accurate referral and will help provide some context for the provider that receives the referral.

Suggestion:
Have navigators gather information about previous legal services received during the DCRB intake screening.

An additional recommendation involved a relatively straightforward way to reduce some repeat referrals (although not repeat clients). One partner suggested that the DCRB system create a flag for when an organization rejects a referral due to conflict. This conflict flag will ensure that this applicant will not get routed back to this provider in the future.

Information Sharing and Applicant Confidentiality

Partners agreed that the DCRB did a good job of protecting applicant confidentiality during the pilot launch. They appreciated that the initial referral only shows the basic information needed for a conflict check, and that the provider does not receive the rest of the intake screening information until the conflict check has cleared. They also felt that, during the pilot launch, the internal communication about the posture of the referrals or services provided was appropriate and adequately safeguarded clients' confidentiality. They explained that the potential for complication arises when a case requires more than one referral, because this prompted questions about how much information, if any, the first provider should share back with the DCRB or with the second referred-to provider. Given the limited scope of the pilot, this issue arose only minimally. However, partners warned that, as the DCRB expands to include other areas of law and larger numbers of organizations, this issue will become more pronounced and that the **protocols to protect applicant confidentiality will need to be continually refined** to ensure that they keep pace with the system's size and functionality.

DCRB Intake Screenings

Partners appreciated the information in the DCRB intake screenings and noted that they were nearly always complete. However, a couple of partners stated that they had received a DCRB referral with an incomplete intake screening (accompanied by a note of acknowledgement from the navigator) because the applicant was not willing to provide all of information (usually household income information) to the navigators. When this happens, the navigators are left to process a referral without key information that directly impacts eligibility, which can increase the likelihood of a referral being rejected. Incomplete intake screenings also then require legal services intake staff to call the applicant to request that information, and then potentially discover that the applicant is ineligible due to income (or reject the referral because the applicant declined to provide the necessary information to establish eligibility for services). Although this was a rare occurrence, partners suggested that navigators have a script to explain to applicants why certain information is necessary and how it will be used.

Partners reported that it would be very helpful for the intake screening to include the applicant's court case number, the court docket, any case filings, or related cases (e.g., a child support case that is related to the custody case). They recommended that the navigators download the docket and any filings, attach these documents to the referral, so that when the referral is accepted by a legal services partner, the attorney can immediately review the case status and history. Partners agreed that including this court information in the DCRB referral would expedite the review process. If the docket information is not available or the court is slow to respond to the request, navigators can include a note to explain that the request has been made (e.g., "Docket information requested and forthcoming"). Knowing that communications with the court can sometimes be slow, one partner suggested that the DCRB platform include a button that sends an automated email to the court to request a case number for an applicant.

Suggestion:

Develop a script for navigators to explain why intake screening information is needed and how it will be used.

Suggestions:

Have navigators include court case number, docket information, and case filings with the referral paperwork. Augment the DCRB system to enable navigators to send an automatic email to the court requesting case numbers.

STAFF & PARTNER RECOMMENDATIONS FOR FULL LAUNCH

DCRB staff and pilot partners offered advice for the host organization and program manager of the DC Resource Bridge when it fully launches and recommendations for successful full-scale implementation. The groups' suggestions were combined into the single list below.

Host Organization and Staffing

- **Ensure DCRB integrity.** Respondents generally agreed that the DCRB should be its own entity, with dedicated funding and staff who are focused solely on the system's mission. If the DCRB is hosted by a legal services organization, they felt strongly that the organization must have the resources and capacity to handle the additional demand of the DCRB and, importantly, the ability to keep the system fully separate from existing legal services work. This separation includes staff (i.e., staff roles solely dedicated to the DCRB), technology (i.e., firewalling the DCRB system from the organization case management system), and information (i.e., keeping information about DCRB applicants and legal services client totally separated).
- **Dedicate staff to the DCRB.** Respondents felt that the DCRB will require dedicated staff. They cautioned against having legal services staff split time between DCRB duties and their existing organizational roles, as this would hasten burnout and blur lines that may create ethics issues.
 - **Ensure sufficient FTE, especially for navigators.** Respondents underscored that the dedicated DCRB staff—navigators, supervisors, and project directors—will need adequate FTE to conduct daily operations and steward expansion. As the DCRB grows to include new areas of law and participating organizations, the call volume will increase and the staff FTE must keep pace.
 - **Staff an attorney supervisor.** Respondents highlighted the need for a dedicated, full-time attorney to supervise the work of the navigators. This person can answer legal questions and help navigators accurately identify legal issues. An attorney supervisor also enables the DCRB to provide legal advice to applicants, when necessary.
- **Empower and trust the navigators.** Some respondents acknowledged that, in legal services environments, “attorney staff voices can be prioritized over non-attorney staff voices.” They pointed out that, with the DCRB, the true experts will be the non-attorney navigators who talk with applicants and operate the system daily, and that their voices will be key to ensuring the DCRB achieves its mission. As such, the host organization must listen to navigators' perspectives and afford them sufficient autonomy to grow the DCRB.

- **Provide comprehensive navigator training.** Respondents noted that, as the DCRB expands to include other areas of law, that navigators will benefit from training in these areas to be able to accurately assess applicants' legal issues. Navigators should also be offered continued training in trauma-informed services, de-escalation tactics, and the District's broader service system.

Collaboration

- **Develop strong relationships with legal services providers.** Respondents underscored the importance of establishing a robust collaboration, with relationships based in mutual respect, accountability, and commitment to a shared mission.
- **Maintain good communication with participating legal services providers.** Respondents offered several suggestions for the DCRB staff to support good communication, including:
 - **Host quarterly meetings** to convene the participating organizations, collectively discuss implementation successes and challenges, and identify potential system improvements. Regular email communication in between quarterly meetings would also help.
 - **Hold individual onboarding meetings** with each participating organization to orient them to the DCRB system, answer any questions, and establish rapport.
 - **Establish a contact person** in each participating organization who is trained in the DCRB system, responsible for communicating with navigators, and able to ensure that DCRB referrals are sufficiently prioritized within the organization's intake processes.
- **Leverage expertise of civil legal aid community.** Respondents noted the deep knowledge and expertise among the civil legal aid providers in the District and recommended that the DCRB tap into this resource, especially to support training and technical assistance for navigators and program managers (e.g., training on best practices for screening applicants for sensitive topics that are relevant to program eligibility, such as survivor status).
- **Promote participation in the DCRB.** Respondents were aligned with the DCRB's mission to encompass all areas of civil law, as this will make it a more valuable resource for District residents. Respondents thought that it will be critical for those affiliated with the DCRB to educate and encourage participation among other providers who are less familiar with the system or the concept of coordinated intake. They suggested telling organizations about positive aspects of coordinated intake and referral, such as:
 - It benefits residents by improving legal services accessibility to the community.
 - Participation is low barrier, with an easy learning curve and a user-friendly platform.
 - Coordinated intake and referral can expedite the process to find and take on new cases. Instead of getting cold calls from residents, providers receive referrals that have already been screened for eligibility.

Operations

- **Establish clear protocols and reinforce them.** Respondents noted the importance of having very clear and easily understood protocols to guide DCRB operations and outline expectations for participating service providers. It will be necessary to periodically review and refine these protocols, as they may need adjustment as the DCRB grows, and to continually communicate them to partners and reinforce their importance.
 - **Clearly define expectations for participating organizations.** Respondents highlighted the importance of ensuring that, at the beginning of the collaboration, all participating organizations clearly understand what DCRB participation entails, including what they will be expected to do, how, and when. This shared understanding will support the implementation of any accountability processes.
- **Ensure efficient case routing.** Respondents noted that, even in a limited-time pilot in one area of law, there were issues with handling repeat clients, which created some circular case processing. They emphasized that the magnitude of this issue will grow as the DCRB expands to include additional areas of law. Ensuring efficient case routing—making clear, direct referral pathways and limiting recursive referrals—will be necessary as the system scales up.
- **Provide navigators with clear scripts.** Respondents wanted navigators to have clear, scripted messages that they can read to applicants when the process encounters unintended outcomes (if they don't have these resources already). For example, when an applicant's referral is rejected, a script would help the navigator clearly explain the process so that the applicant understands exactly what is happening. Also, a scripted message could help explain why navigators ask for the information in the intake screening (i.e., to facilitate an appropriate referral), which may help increase applicants' willingness to answer all of the questions.
- **Expand referral information to include court case information.** Partners explained how helpful it was when navigators attached court-related documents with the DCRB referral, including the case number, docket information, any filings, and any related cases. This information streamlines case assessment, and they recommended that the inclusion of court documents become a standardized part of the DCRB referral protocol.
- **Keep communications within the DCRB system.** Respondents noted how it can become challenging to piece together information about a DCRB-referred case when it is spread across different emails. They expressed a strong preference for all communications about DCRB referrals or case placements to stay within the DCRB platform, so that the status is easy to see and the history is easy to track. For this to be effective, legal services staff will have to regularly check and update the DCRB system, and the system will have to include all necessary fields to indicate progress.

SUMMARY

At the start of the DC Resource Bridge project, DCBF and the core project team aimed to develop a coordinated intake and referral system that efficiently connects DC residents with legal assistance *and* that is both user-centered and community-driven. A review of the DCRB's design and development process and an evaluation of data from the pilot launch indicates that they have largely succeeded in these goals. Because the DCRB is still in a nascent stage, these early successes amount to the establishment of a sturdy, collaborative, and data-informed foundation—a critical first step. While many questions remain about the DCRB's full-scale implementation, the limited-scope pilot launch provides some important lessons on which DCBF and project partners can build.

LEARNINGS FROM THE LIMITED-SCOPE PILOT LAUNCH

DCRB technological platform and protocols were effective. The DCRB connected 42% of all applicants (60% of eligible applicants) with a legal services provider, and several others were provided with legal information and other helpful resources. On average, it took a little less than 2 weeks (13 days) for applicants to complete the full DCRB process and receive a decision on whether their case had been accepted for services. The applicant drop-out rate was relatively low, likely due to the speed of the process and ongoing communication with the navigators. Only 12 (9%) of applicants dropped out of the process (i.e., stopped responding to navigators or to legal services staff for intake) before a case placement decision was made.

Technology Platform

Successes. The customized technology platform developed for the DCRB was successfully implemented. Staff and partners agreed that it is easy to use, includes the necessary information, and adequately protects client information. The case routing algorithm appears to be working effectively, as navigators agreed with the system's referral suggestions and partners reported that 4 out of 5 referrals they received were appropriate for their organization.

Potential improvements. Staff and partners used the pilot launch period to identify and request small changes and additions to the DCRB system, which has helped to foster continual improvement and a culture of collaboration and responsiveness. In discussing how the platform could be improved, DCRB staff and partner legal services providers were aligned in their suggestions. Specifically, they requested that the system be augmented to include a flag for applicants with urgent needs to fast-track review, a way to identify repeat applicants, and additional fields for legal services staff to indicate when they are actively assessing a case (between accepting a referral and making a case placement decision). These additions would support efficient processing of cases with specific attributes and communication between navigators and legal services staff.

Considerations. As the DCRB moves toward full launch, the technology platform will have to expand to include dozens of legal services providers and referrals across multiple areas of law. The case routing algorithm, which worked well in the small-scale pilot, must continue to function effectively and equitably within this broader, multi-partner environment. The system’s ability to produce accurate referrals is premised on the legal services partners keeping their information current in the provider database (which undergirds the DCRB referral database), which will likely require effort by the DCRB staff or technology consultant to continually review and prompt providers to update their organization’s information. Lastly, full launch of the DCRB will involve navigators handling live phone calls from applicants, and this functionality and related information fields must be incorporated into the system (and tested before going live) in a way that supports efficient referrals and timely communication with applicants and partnering organizations.

The case routing algorithm must function equitably in a multi-provider environment. The provider database must stay current.

Protocols & Workflows

Successes. An early project intention was for the DCRB to be designed by and for the people using it, including the legal services staff who would be interacting with the technological platform and the navigators to process referrals and place cases. This intention was borne out through the many opportunities for input provided to legal aid providers. Notable among them was the Pilot Protocols Workgroup in which staff from 10 legal services providers collectively developed the protocols and workflows that would be used by the DCRB staff and partner organizations. Simply put, the DCRB relied on frontline experts to determine the most efficient and most reasonable approaches for delivering services and to ensure that the protocols were workable for the legal services community. This collaborative approach was successful in that it yielded strong buy-in among the organizations, many of whom stayed engaged throughout the pilot launch period, and robust protocols that proved effective and sustainable through pilot testing.

DCRB staff and pilot partners agreed that the protocols largely played out in practice as expected. The intake screening processes undertaken by the navigators operated smoothly. The referral response timeline worked well; legal services partners responded to 88% of referral requests within the 3-day window. While the case placement timeline involved some more difficulty, it was also largely workable; legal services partners communicated 75% of case placement decisions within the 10-day window. It is worth noting that following up on case placement decisions is time-consuming for navigators, and having to do this level of follow up for 25% of referrals will likely not be sustainable as the call volume increases. As described above, staff and partners thought that this tension would be eased by additional fields in the database to reflect referral status while a legal services partner is working on the full intake, which would reduce the amount of follow-up that navigators need to do.

Potential improvements. Staff and partners noted a couple of additional protocols would be useful. First, in addition to the requested system flag to indicate an applicant with urgent needs, staff and

partners noted the need for a protocol to govern “fast-track” review and case placement, including shortened timelines. Second, staff and partners felt that the DCRB would benefit from more robust protocols that dictate how to handle repeat applicants. This would include protocols to reduce duplication when possible (gathering information to ensure that navigators do not send applicants back to a provider that has already helped them) and protocols to address situations when applicants contact the DCRB for the same issue after having already been referred for services. Addressing duplication may require information sharing among system partners, which will necessitate discussions about how to handle information sharing while maintaining client confidentiality.

Considerations. As the DCRB expands to include additional areas of law and more organizations, the potential for repeat applicants and duplication will increase. DCRB staff and partner organizations will need to collaboratively determine protocols to guide operations to ensure that providers are not dealing with duplicative intakes, applicants are treated equitably, and navigators can easily process referrals and clearly communicate expectations to applicants.

As it grows, the DCRB will require protocols to handle repeat applicants. Navigators will require sufficient FTE to handle non-linear referral patterns and maintain trauma-informed services.

As shown in the pilot launch, while most referrals proceed according to the expected protocol, a sizeable minority do not. These cases often involve extraneous conditions that do not conform to the linear referral process and, as such, require additional time by navigators to facilitate. Moreover, during the pilot launch, navigators invested time in listening to and connecting with applicants, following through on the DCRB’s promise of trauma-informed services. This level of attention, which is critical to applicant experience, also requires additional time by navigators. As the DCRB grows, so will the number of calls that require extra oversight or attention. Sufficient navigator FTE will be essential to maintaining a high level of service and ensuring no referrals fall through the cracks.

As the DCRB expands to other areas of law, navigators will need substantive training in each area of law to ensure that they can accurately identify the presenting legal issue. Attorney supervisors can help by answering legal questions, assessing legal problems, and offering legal advice, when appropriate, to applicants whose case does not merit referral. For the full launch, staffing plans should consider how navigators can benefit from attorney support.

Collaborative Infrastructure to Support the Full Launch

Findings underscored that a successful and sustainable DC Resource Bridge will require:

- Uniform understanding among partners regarding **what the DCRB is** and what it is not;
- Clear model for **leadership and governance**, including transparent and defined avenues for decision-making authority;
- Clear **articulation of what “DCRB participation”** entails for providers, what they will be expected to do, and how accountability measures will support consistency of implementation.

REMAINING QUESTIONS

The pilot launch of the DC Resource Bridge has given proof of concept for coordinated intake in the District and has road-tested a new, customized technological platform. The pilot was small by design, allowing the focus to be on testing and refining the technology and the protocols, which was beneficial to establish a strong foundation. At the same time, the pilot's limits—namely, operating in one area of law, having only a handful of providers accepting referrals, and fielding applications through a titrated online system—also limited what could be tested and understood. Some fundamental aspects of the system's operations under full-launch conditions remain unexamined.

Questions related to technology or protocols. Some areas of inquiry that were not addressed by the pilot, but are pertinent to the full launch, include the following.

- how the navigators' workflow may change when they are answering live calls in addition to calling applicants back;
- how the online intake process will work when applicants are completing the forms (not staff from other organizations);
- how the technological platform will handle case routing across dozens of providers;
- how the intake screening process will need to change to accommodate the information needs of multiple areas of law;
- how the workflow will need to adjust to accommodate areas of law with shorter procedural timelines (e.g., eviction, civil protection/restraining orders); and
- how to handle a higher number of repeat applicants.

Questions related to DCRB more broadly. In addition to the technology and protocol related questions, there are also broader questions related to the DCRB's operations, partnerships, integration into the community, and governance.

- how to onboard new legal services partners, ensure good communication, and maintain a productive and equitable collaboration;
- how the DCRB can most effectively be rolled out to other areas of law;
- how much navigator FTE will be necessary as call volume increases;
- how the DCRB will handle applicants who are referred to a partner, receive brief services, and then call back looking for additional assistance;
- whether and how to incorporate legal information and self-help resources;
- whether and how to integrate with the existing intake and referral networks in the District; and importantly,
- how to develop a governance model that maintains community ownership of the DCRB while clearly delineating decision-making authority.

RECOMMENDATIONS FOR FURTHER EVALUATION

Evaluation has been incorporated into the DC Resource Bridge since the beginning, and the system's design and development has benefitted from having data to inform decision making. DCBF and DCRB managers can ensure that the DCRB remains data-informed by doing the following.

- ❖ **Use data to regularly monitor operations.** While the DCRB technology platform is the vehicle for navigators to send referrals, it is also fundamentally a database that contains information related to the applications received, referrals processed, and cases placed. This database can be queried to provide staff and managers with regular assessments of DCRB implementation, such as call volume, response times, and case placement rates. To support this capacity, the evaluation team has worked with the technology consultant to develop automated data reports that can be easily run from the DCRB system to monitor implementation. These reports will enable DCRB staff and managers to have real-time information about demand, operations, and outcomes.
- ❖ **Gather feedback from applicants.** Understanding the DCRB's aim to be user-centered, and the need for data from applicants to achieve this goal, the evaluation team developed short (3-item) text survey to gather feedback from applicants about their experience with the DCRB. The technology consultant built this functionality into the DCRB system so that surveys are automatically texted to applicants when the navigator closes their case. At the time of this report, there were 10 completed surveys, too few to support analysis. However, going forward, the DCRB staff can encourage applicants to complete the survey and offer feedback, and this data can be regularly reviewed by DCRB staff and managers to inform operations.
- ❖ **Conduct periodic deep-dive evaluations.** As described above, routinely reviewing the DCRB system data to monitor operations is a terrific strategy for partners to stay data-informed. However, automated analysis can only address limited types of questions. Periodically engaging an external evaluator to do a comprehensive evaluation and a full data audit will enable DCRB partners to ask more nuanced questions about the system's implementation and impacts—for example, how the DCRB is working for applicants with different characteristics or circumstances, and what kinds of impacts the DCRB is having for applicants, providers, and the community.

CONCLUSION

When launched more fully, the DC Resource Bridge has the potential to fundamentally change the civil legal aid system in Washington, DC, and to improve residents' access to legal services and, ultimately, to justice. The DCRB's viability depends on the acuity of its design, its accessibility, its ability to produce efficient and appropriate referrals, the breadth of participation by legal services providers, and its reputation in the community as a reliable and trustworthy resource. Most importantly, its success rests on its ability to maintain a steadfast commitment to meeting the needs of users, both District residents and legal services providers. The DCRB's early stages of collaborative design and the learnings from the pilot launch evaluation provide an excellent starting point.

APPENDIX

Exhibit A-1. Demographic Characteristics of DCRB Applicants

	# (%)
Gender	
Woman	61 (48%)
Man	64 (50%)
Transgender	0 (0%)
Non-Binary	0 (0%)
Another gender	0 (0%)
Preferred not to say	0 (0%)
Unknown / Missing	2 (2%)
Race/ Ethnicity	
Black or African American	103 (81%)
Latino/a or Hispanic	8 (6%)
White	5 (4%)
Asian	0 (0%)
Native Hawaiian or Pacific Islander	1 (1%)
Native American	0 (0%)
Another race	0 (0%)
Preferred not to say	2 (2%)
Unknown / Missing	9 (7%)
Age	
18 to 30 years old	16 (13%)
31 to 45 years old	75 (59%)
46 to 60 years old	26 (21%)
61 to 75 years old	9 (7%)
76 years or older	0 (0%)
Preferred not to say	0 (0%)
Missing	1 (1%)

Note. Applicants could indicate more than one racial identity, so the percentages for race may total more than 100%.

Exhibit A-2. Days between Referral Initiation and Referral Response

Number of days between LSP receiving a DCRB referral and responding whether they will take the referral for further review or not	# (%)
0-1 day	101 (72%)
2-3 days	23 (16%)
4-6 days	16 (11%)
7-10 days	0 (0%)
10+ days	0 (0%)

Exhibit A-3. Days between Referral Acceptance and Case Placement Decision

Number of days between LSP taking a referral for further review and accepting/rejecting the case for services	# (%)
0-5 days	74 (62%)
6-10 days	16 (13%)
11-20 days	22 (19%)
21-30 days	6 (5%)
31+ days	1 (1%)

Exhibit A-4. Days between DCRB Intake Screening and Case Placement Decision

Number of days between DCRB Intake Screening and LSP Case Placement Decision	# (%)
For the 59 cases that were accepted for services...	
0-5 days	18 (31%)
6-10 days	8 (14%)
11-20 days	16 (27%)
21-30 days	12 (20%)
31+ days	5 (8%)
For the 26 cases that were not accepted for services...	
0-5 days	11 (42%)
6-10 days	8 (31%)
11-20 days	6 (23%)
21-30 days	1 (4%)
31+ days	0 (0%)



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