

Visit us on the Web at www.GreatPrograms.Org

Thanks for your interest in our Workshop on the Use of Outcome Measures and Program-Owned Evaluation in Civil Justice Programs.

The workshop program and registration form are enclosed. We'd love to have you or one of your colleagues attend. This workshop is all new, so if you've been to one of our program assessment workshops before, you will find many new tools to apply to your program or project.

We have been in the middle of dramatic advances in the field of program assessment and outcome measurement in the past two years. We have been engaged in exciting work, ranging across a wide spectrum from evaluating small pro se assistance and hotline projects to implementing the statewide outcome measurement system for Texas; from developing the Matters reporting system for LSC to helping huge regional programs deal with the aftereffects of merger.

This is going to be a breakthrough event, bringing the latest work on outcome measures in the civil justice community to bear on three simple yet powerful questions: What results (outcomes) are we seeking in our work? How do we measure them? How do we *double* them?

Note that you can save money by registering early (up to our August 21 "early registration" deadline). Save additional dollars by booking your airline tickets early and including a Saturday night stay-over. There's lots to see and do in and around Traverse City; it is a great small town and the hub of the one of the country's favorite resort destinations. We will be organizing two "field trips" for those who wish to stay over -- a winery tour and a float trip on the Crystal River -- on the Saturday afternoon following the workshop.

If you'd like to discuss this further, please feel free to call me at (231) 947-3280 or e-mail me at ken@greatprograms.org. More information about the workshop and the conference site on Grand Traverse Bay is available on our web site at www.GreatPrograms.org.

Best,



Ken Smith

Five Reasons
You Should Attend the
Performance Driven Management Workshops in Traverse City

1. *Spend 1-1/2 days sharing ideas with people who share your passion for expanding access to justice.*
2. *Bring back new perspectives on improving and growing your program.*
3. *Learn how to tell your program's "story" in a more powerful way.*
4. *Invest in your own professional development.*
5. *Connect with some new people... and a whole new way of looking at your work.*

Six Reasons
You Should Send **Your Staff**
To Attend

1. *See reasons 1-5 above.*
2. *Provide powerful tools they can bring back and share with the whole program.*
3. *Connect them into a network of people across the country who are doing breakthrough work in program assessment... outcomes measurement... strategic marketing... action team leadership*
4. *Expose them to new ways of thinking about legal services delivery, management and leadership.*
5. *Invest in the professional development of your best people.*
6. *Reinforce creativity... initiative... dedication to your Equal Justice agenda.*

*For program details, site information and registration materials,
visit our web site at*

www.GreatPrograms.Org

or contact Kay Smith at (231) 947-3280

E-mail: kay@greatprograms.org

IOLTA *Information Services*

The Resource *for Great Programs, Inc.*

Announces a workshop on . . .

***Performance-Driven Management:
Using Outcome Measures
and “Program-Owned” Evaluation
To Improve and Market
Civil Justice Programs***



**September 21-23, 2004
The Bayshore Resort
Traverse City, Michigan**

Every program can produce better outcomes for clients — and attract more funding — using an approach we call Performance-Driven Management.

In this workshop, 8-20 civil justice professionals will explore the use of powerful evaluation tools as a strategic approach for dramatically improving results for clients. And they will learn how outcome measures can help them tell a more compelling “story” to the decision-makers who control purse strings, including legislators, bar leaders, the judiciary and local officials. This workshop will address three straightforward questions that define Performance Driven Management: ● What results are we seeking in our work? ● How do we measure them? ● How do we *double* them?

The Resource is a national leader in applying outcome measures for achieving client service improvements and program growth.

Since 1984, we have done breakthrough work resulting in new legal services measurement systems. These range from the statewide outcome measurement systems currently being used by more than 200 legal aid programs in New York, Virginia, Texas and other states to development of LSC’s national “Matters Service Report.” In 2002-2003, we helped the Equal Access Fund in California to develop the “Evaluation Toolkit,” a comprehensive set of tools for carrying out simple, affordable “program-owned” evaluations of civil justice projects. And we led peer consultant teams in on-site evaluations pointing to powerful strategies for addressing the challenges left in the wake of difficult program mergers.

This workshop will bring you quickly up the learning curve on outcome measurement models for civil justice programs, then apply these tools to the specific challenges and opportunities you face in your work. You will learn how to apply these tools for two key results: better management that produces better outcomes for clients and powerful marketing that leads to funding sustainability for your program or project.

You should attend if you are . . .

- ***A program director or project coordinator*** seeking to double your program’s impact on the community and ability to attract grant funding in today’s highly competitive environment.
- ***A funder (staff, board member or grant committee member)*** seeking to better understand how outcome measures can dramatically improve the performance of the programs you are overseeing.
- ***A participant in an Access-to-Justice group*** seeking to expand access to civil justice in your state.
- ***An advocate or consultant*** seeking to enhance the knowledge and practical tools you can bring to clients in the field of program evaluation.

Dates to Remember

- **August 21:** Early register-by-fax discount deadline
- **September 14:** Hotel reservations due at the Bayshore Resort
- **September 7:** Last day for 14-day advance air fare
- **September 21:** Evening reception for arriving participants
- **September 25:** Afternoon “field trips” -- winery tour and Crystal River float trip -- for people planning to enjoy area attractions following the workshop.

Agenda-At-a-Glance

Tuesday Sept 21

Afternoon
5:00-7:00 pm *Travel to Traverse City
Reception & registration*

Wednesday Sept 22

8:00 am *Continental breakfast*
9:00-10:00 am *What outcomes are we seeking?* Exploration of the results being sought by participants in their work
10:00-11:30 am *How do we measure them?* A review of the state-of-the-art of outcome measurement and program evaluation in civil justice systems. An exploration of how these apply to the projects and programs in which participants are involved.
12:30-2:00 pm *Lunch break*
2:30-5:00 pm *How do we double them?* How a performance-driven management approach can dramatically improve outcomes. How we can use outcome measures to "market" our programs and projects.
6:00 - 7:00 pm ***Meet for Dinner Outing***

Thursday Sept 23

7:30 am *Continental breakfast*
8:30-10:45 am *Performance-Driven Management: Benchmarks for assessing our projects and tracking our growth. A Strategic Scorecard for optimizing performance on the results we have chosen.*
10:45 - 12 noon *Application.* How we will apply the things we've learned to dramatically improve performance and expand funding for our projects back home.
12:00 Noon ***Workshop adjourns***

Saturday Sept 25

Afternoon Optional guided field trips for those staying over:

- Leelanau County Winery Tour
- Float trip on the Crystal River

Workshop Leaders

Ken Smith, President of *The Resource*, has over 20 years' experience designing outcome measures for civil justice programs, including the IOLTA reporting systems currently in place in New York, Florida, Virginia, Texas, Pennsylvania and several other states, and the Matters Statistical Report (MSR) recently implemented by the Legal Services Corporation. He has led breakthrough efforts in establishing the state of the art in outcome measurement, benchmarking and program analysis and is a nationally recognized leader in this field.

David Smith, Vice-President of *The Resource*, has served as a charter member of the Health Industries Practice at Booz-Allen & Hamilton, one of the world's premier management consulting firms. With *The Resource*, he has coached numerous program staffs in conducting "program-owned" evaluations applying the Evaluation Toolkit, has led our legal needs assessment projects and provided innovative financial modeling services to IOLTA programs aimed at maximizing the revenues derived from IOLTA account portfolios.

Susan Lucas, Senior Associate, has been the owner and principal of Susan J. Lucas Consulting Services, located in Erie Pennsylvania, since 1993, and has been an affiliate of *The Resource* since 1999. She manages our evaluation work for the Pennsylvania Legal Aid Network and is an expert on application of the *Strategic Scorecard* methodology for evaluating legal aid programs.

The Conference Site

The Bayshore Resort is located on the beach in Traverse City, a gem of a small town located on Grand Traverse Bay on northern Lake Michigan. It is at the hub of a five-county resort area that boasts some of the Great Lakes' finest beaches, walking trails, nature reserves, golf courses and a National Park. The workshop site is within a ten-minute walk of downtown shops and restaurants, parks, marinas, libraries, galleries, museums and a college. The greater Grand Traverse Region is known as "The Cherry Capital of the World," the nation's largest exporter of tart cherries as well as a leading producer of apples, peaches, big fish and award-winning wines.

Logistical Information

Accommodations

The Bayshore Resort (conference site) is a beachfront hotel on Grand Traverse Bay of Lake Michigan. It is fully equipped with beach access, indoor pool, Jacuzzi, exercise room, game room and other amenities. A block of rooms at special conference rates is being held until September 14. **Participants must make their own reservations by calling (800) 634-4401.** Lodging prices at the Bayshore Resort vary from \$79-\$126 for a standard room to \$106-\$155 for a full-Bay-view room. *All rates are plus tax (eight percent).*

The Bayshore Resort is an all-non-smoking facility. Smoking rooms are available at the Holiday Inn, located within a five minute walk from the conference site (phone 800-888-8020).

Air travel

Northwest, American and United Airlines provide good connections to Traverse City with comfortable jet and large-propjet service, connecting through Detroit and Chicago. With 14-day advance reservations and a stay-over on Saturday night your fare will likely be within a \$350-500 range.

Local transportation

The Bayshore Resort will supply free shuttle service from Traverse City Cherry Capital Airport. You will not need a car during the workshop — restaurants, shops and recreational facilities are within easy walking distance. Car rentals from Hertz, National, and Budget are available at the airport if you wish to do further sight-seeing while in the area.

Fun

A wine-and-cheese reception is scheduled for Thursday evening to greet you as you arrive and register. *A group dinner* is scheduled for Friday evening at one of the local gathering spots that make Traverse City a regional favorite for visitors — cost will be \$15-\$30. You are also encouraged to stay over after the workshop and explore the Grand Traverse region's many cultural, scenic and recreational attractions. We will provide restaurant lists and schedules of local events, and depending on interest, will lead two optional "field trips" on Saturday afternoon, September 25: a tour of some of the award-winning *Leelanau County wineries* and a float trip on the beautiful *Crystal River* in the Sleeping Bear Dunes National lakeshore.

Conference fees and registration

The table below indicates fees for different categories of registration. Fees include continental breakfast on both days. Other meals are on your own at nearby restaurants, which are close by and economical (\$6-15 breakfast & lunch; \$15-30 dinner).

	Early Registration Through Aug 21	Regular Registration Aug 22 - Sept 21
First person from an organization	\$350	\$495
Each additional person	\$295	\$395
User group discount (current clients of The Resource)	\$75	\$50

Send Your Registration Today and Save!

Submit the Registration Form enclosed with this program or contact *The Resource* to have one faxed or e-mailed to you. Register early — you will save money and ensure a space at the workshop. To ensure quality, the workshop will be limited to 20 participants.

For Further Information,

Contact:

Kay Smith, Vice-President
The Resource
539 East Eighth Street
Traverse City, MI 49686
Phone (231) 947-3280
Fax (231) 947-5734
e-mail: kay@greatprograms.org

Registration Form

Outcome Measures and Program-Owned Evaluation Workshop

Bayshore Resort, Traverse City, MI ~ September 21-23, 2004

Please register early - workshops will be limited to 20 participants.

How to Register

- 1) Complete the form and send check payable to "The Resource" to 539 E. Eighth Street, Traverse City, MI 49686, ATTN Kay Smith.
- 2) Inquiries regarding registration can be directed to Kay by phone: 231-947-3280, by fax: 231-947-5734, or by e-mail: kay@greatprograms.org

Cancellation and Refund

Workshop registration cancellations received by August 21, 2004 will be refunded in full. After then, registration fees are non-refundable but may be transferred to another workshop of your choice.

Personal Information

Name _____
 Title _____
 Organization _____
 Address _____ STE _____
 City _____ State _____ Zip _____
 Phone _____ Fax _____
 e-mail _____

Registration Fee Enclosed

<i>Circle all that apply.</i>	Early Registration Through Aug 21	Regular Registration Aug 22- Sept 21
First person from an organization each workshop	\$350	\$495
Each additional person each workshop	\$295	\$395
User group discount (current clients of The Resource)	\$75	\$50

Total Enclosed: \$ _____

Hotel Reservations

The workshops will be held at the Bayshore Resort in Traverse City. Please call to make your room reservation. There are three types of rooms to choose from with the following cost (*preliminary*):

	Weekdays (Sun-Thur)	Weekends (Fri-Sat)
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Standard	\$79	\$126
Partial View*	\$88	\$135
Full View*	\$106	\$155

*View indicates a view of Grand Traverse Bay from each room.

All rates are plus tax (8%).

Please act quickly to arrange airline tickets as flights fill and prices increase. The major airlines that service Traverse City are Northwest, American and United.

The Bayshore Resort will supply free shuttle service (5-minute ride) from the airport or you can take a cab upon your arrival.

The Bayshore can be reached at **(800) 634-4401**.

Cutoff date for guaranteeing special conference rates is September 14, 2004.

Be sure to inform the reservation agent that you are with The Resource Workshop in order to secure the above rates. ***This facility is COMPLETELY non-smoking.*** For smoking accommodations, we can refer you to area Hotels and Motels.

Guests of the Bayshore Resort will receive a complimentary breakfast (waffles, sausage, omelettes, breakfast breads, muffins, bagels/cream cheese, fresh whole/cut fruit, yogurt, assorted cereals, donuts, danish, coffee, tea, milk, juice).

All other meals will be at area restaurants (not included in conference fees).