

SLASS SELF-ASSESSMENT TOOL

Why Self-Assessment for SLASSs

In 2001, the SLASS quality initiative was launched. The initiative involved consultation with the six SLASS and the development of a Quality Review Tool that established five SLASS quality dimensions as well as criteria and indicators (SLASS Review Tool). The Review Tool was used to conduct baseline on-site quality reviews of each SLASS from March 2002 to May 2004.

Self-assessment represents a *second generation* of quality initiatives for SLASS that recognizes and builds on the valuable quality framework already established by the baseline reviews and Review Tool. It is a means by which SLASS can take ownership of continuous quality improvement through assessing and monitoring policies and procedures.

About This Self-Assessment Tool

The Quality Service Office has developed this self-assessment tool (SAT) for use by the SLASS. The quality dimensions and criteria included are taken from the SLASS Review Tool. The SAT has been divided into five sections that represent key operational areas that impact on quality service. The main purpose of the SAT is to help SLASSs identify their own strengths and weaknesses and decide on priority improvement areas for action. The SAT will also provide LAO with information for celebrating SLASS successes and identifying systemic issues.

Reporting

SLASS complete the web-based self-assessment tool once every three years as part of a SLASS's 3-year planning cycle and identify three priority areas for improvement for each of the three funding years. (For example, Section I. Accountability & Management, Section II. Program Planning and Evaluation, and Section III. Supervision, might be identified as priority areas for Year One; in Year Two and Three, the same or different priority areas might be identified). On an annual basis, SLASS determine improvement objectives in the three priority areas identified and develop an improvement plan. In addressing year one priorities, in the area of accountability, program planning, and supervision, for example, one improvement objective might be to enhance orientation for students.

SLASS complete and submit the SAT electronically to QSO every three years. The QSO will aggregate the data and use the information to inform the development of supports to SLASS, to celebrate SLASS successes, and to identify systemic issues. The completed self-assessment improvement plans remain with the SLASS. SLASS indicate on their annual funding application the date the self-assessment tool was completed and the three priority improvement areas identified for that funding year.

How to Use This Tool

It is up to individual SLASS to decide how best to use this tool. LAO recommends the Dean be involved in the sections that deal with accountability and management, and program planning and evaluation. It is a best practice when an organization is undertaking a self-assessment to involve all staff in the assessment process.¹ When identifying the areas for improvement, we recommend you discuss with all staff the steps needed to achieve the planned improvements. The Quality Service Office has included fundamental quality criteria in this tool, but we encourage SLASS to add their own quality criteria.

The tool can be used in paper form, with each member of the self-assessment team getting a copy. The completed tool is submitted to QSO electronically. Each page captures a critical area of SLASS operations. We have included planning sheets to assist you in making improvement plans and have provided a completed example as a precedent. “No” or “working on it” answers do not necessarily indicate a SLASS is functioning poorly. It may indicate a systemic issue that SLASS and LAO need to address. As with any self-assessment, true benefits are derived when the answers are frank and true.

¹ When it is done in a participatory way, the process of organizational assessment can itself build organizational capacity. By stimulating reflection, learning, and dialogue, new and old problems and opportunities are examined, and ideas for addressing them generated: A Guide to the World Wildlife Foundation Organizational Assessment Process 2003
http://www.ngomanager.org/tools/wwf_organisational_assessment_guide.doc

I. ACCOUNTABILITY AND MANAGEMENT

1. The management structure of the SLASS is set out in writing.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
2. There is a written chain of accountability that leads to the Dean.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
3. When responsibilities of the Dean are delegated to a committee or individuals, proper reporting practices have been established and are followed to ensure accountability to the Dean.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
4. Documentation and interviews demonstrate that the Dean regularly receives reports on the work of the SLASS staff and students on such matters as supervision and statistics.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
5. Written reports contain the information necessary to clearly document decisions that were made how they are to be carried out, and other useful information.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
6. There are guidelines to identify and deal with potential conflicts of interest including setting out a course of action when a conflict arises and a method by which the question of conflict can be raised by others.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
7. The Dean is aware of and is the final authority on decisions that have significant policy implications.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
8. The Dean or the dean's delegate has established and uses committees or teams necessary for the SLASS to carry out its work effectively and efficiently.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
9. The Dean seeks input from the various stakeholders responsible for the operation of the SLASS including students, review counsel and other staff.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
10. Interviews and a review of documents demonstrate a co-operative relationship among the various teams responsible for the overall management of the SLASS.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
11. The SLASS has a written outside work policy, which states whether outside legal and other work is permitted.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
12. The policy is consistent with the funding agreement and the MOU with LAO.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
13. The policy requires that the person inform the SLASS before any outside work is	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

I. ACCOUNTABILITY AND MANAGEMENT

performed.				
14. If outside legal work is permitted, the policy addresses insurance issues.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
15. If outside work is permitted, the policy contains guidelines governing issues such as, conflicts of interest, the docketing of time and use of SLASS supplies and resources for outside work.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
16. Practice conforms to policy	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
17. The SLASS has a written personnel policy governing all staff	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
18. A performance review procedure is documented in writing for all staff and the Director.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
19. Regular performance reviews of all staff are carried out.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
20. The Dean or the dean's delegate regularly reviews the financial position of the SLASS and addresses any issues.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
21. There is no deficit or unfunded liability.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
22. There is a written legal disbursements policy which is consistent with LAO policies pertaining to SLASS, and practice conforms to the policy.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
23. There are up-to-date job descriptions for all positions including student caseworkers.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
24. The job descriptions are consistent with the SLASS funding agreement and Memorandum of Understanding with LAO.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
25. The job descriptions are subject to review on a periodic basis.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
26. The division of work within the SLASS is appropriate to the needs of the SLASS including adequate supervision.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
27. When possible, appropriate staffing adjustments are made to accommodate changes in the kinds or levels of service that the SLASS provides.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
28. The SLASS provides staff with the initial orientation and ongoing training needed to carry out their functions effectively and efficiently.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

I. ACCOUNTABILITY AND MANAGEMENT

29. There are written procedures for effective resolution of staff and student complaints and interviews demonstrate that they are accessible to staff and students	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
30. The SLASS management encourages and solicits staff and student input with respect to development of policies and practices.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
31. Staff meetings and student meetings are held at appropriate intervals and all staff members and student caseworkers have input into the meeting agendas.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
32. Minutes are kept of staff meetings.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
33. All staff and students are aware of the SLASS's planning and policy directions including annual goals and objectives.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
34. The SLASS has its own or is covered by the university's equity/discrimination and harassment policies.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
35. OTHER				

I. ACCOUNTABILITY AND MANAGEMENT

COMMENTS:

ACTION NEEDED IN THIS AREA:

Date: _____

Improvement Plan

AREA: I. ACCOUNTABILITY AND MANAGEMENT

What key things do we want to achieve in the next year	What resources do we need	Sources of Assistance	What activities will we undertake	Who is responsible	Timelines

Date: _____

II. PROGRAM PLANNING AND EVALUATION

1. The SLASS articulates clear measurable goals and objectives for client services based on the identified priorities and assigns activities to achieve each objective.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
2. The SLASS periodically considers whether plans to achieve objectives are being carried out.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
3. At least once a year, the SLASS undertakes a assessment of its services including consultation with LAO and other local legal aid service providers.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
4. During this assessment, the SLASS evaluates the effectiveness of its work including reviewing the previous year's goals and objectives and makes appropriate changes in the course of developing future objectives in consultation with LAO.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
5. The SLASS articulates clear measurable objectives for its clinical education program based on the priorities of the Dean and assigns activities to achieve each objective.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
6. The SLASS gathers and records information about the community that will assist it in developing its goals and objectives. This information may include demographic information, social planning materials, and statistics from relevant courts and tribunals.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
7. The SLASS has developed co-operative working relationships with other resources available in the community including other legal aid service providers and the courts.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
8. The SLASS regularly receives, records and evaluates feedback on how well it is meeting community needs, for example from community agencies, clients, the local legal community and other SLASS.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
9. The SLASS regularly receives and records feedback from student participants and evaluates the effectiveness of its clinical law education program.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
10. The SLASS publishes materials such as brochures, pamphlets, newsletters, annual reports, and posters, that describe its services and distributes them in a manner likely to reach the appropriate audiences.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
11. Referral statistics show referrals to and from local agencies.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
12. Interviews with agency staff show an awareness of SLASS's services.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

II. PROGRAM PLANNING AND EVALUATION

13. Interviews with other legal aid service providers show an awareness of SLASS services.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
14. The SLASS makes efforts to achieve strong participation from law students and a good profile in the law school.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
15. The SLASS makes use of media at the university and local media to publicise its activities and initiatives	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
16. A policy contains a list of areas of law in which service is provided	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
17. A policy defines the geographic scope of service provision.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
18. A policy contains case selection criteria, which are consistent with the SLASS's goals, priorities, and financial eligibility requirements.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
19. A policy takes into account service provided by other legal aid service providers and gaps in service identified by LAO.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
20. The case selection criteria incorporate efficiency, timeliness, fairness, supervision requirements and reasonable allocation of resources.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
21. The case selection criteria are clear and give staff adequate guidance as to which kinds of cases they should accept.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
22. Practice conforms to policy on case selection criteria	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

23. OTHER

II. PROGRAM PLANNING AND EVALUATION

COMMENTS:

ACTION NEEDED IN THIS AREA:

DATE: -----

Improvement Plan

AREA: II. PROGRAM PLANNING AND EVALUATION

What key things do we want to achieve in the next year	What resources do we need	Sources of Assistance	What activities will we undertake	Who is responsible	Timelines

Date: _____

III. SUPERVISION

1. Prior to students having contact with clients, the SLASS provides them with initial substantive legal training in the areas in which they will be providing services.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
2. The initial training includes orientation to the administrative procedures of the SLASS including the intake system and screening of clients.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
3. The training of students includes an introduction to good client relations such as communication and interviewing skills.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
4. The SLASS provides students with written materials such as a manual as part of the initial training and orientation.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
5. Throughout the year, the SLASS provides adequate ongoing training and support to students.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
6. Review counsel is involved in the initial and ongoing training of all students.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
7. Training and orientation includes how to make effective use of the services available from other legal aid service providers including clinics, CRO, QAP, legal aid staff offices, LAO-Law, and, Duty Counsel).	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
8. SLASS has guidelines to determine appropriate caseload of each caseworker and each review counsel and guidelines are followed.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
9. Takes into account level of expertise of each worker.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
10. Takes into account size and complexity of existing caseload, availability of support for and supervision of performance.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
11. Caseloads of review counsel and students Take into account Rule 5 of Rules of Professional Conduct with regard to which tasks may be delegated to a non-lawyer.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
12. The SLASS has a written supervision policy.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
13. Practice conforms to the policy.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
14. Each caseworker attends regular case conferences with review counsel	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

III. SUPERVISION

15. All files (including those that are carried by lawyers) are regularly reviewed by a lawyer, including a physical examination of the contents of each file.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
16. There is regular review of the caseload and file turnover of all caseworkers.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
17. A lawyer is available on an ongoing basis for consultation by students.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
18. All student files are reviewed by a lawyer prior to closing.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
19. There is ongoing supervision of legal advice or representation as required by Rule 5 of the Rules of Professional Conduct.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
20. All correspondence on a client file is reviewed by a lawyer.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
21. All correspondence containing a legal opinion is signed by a lawyer.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
22. Where settlement negotiations are undertaken by a student, offers to settle are approved by the supervising lawyer.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
23. Undertakings are given by review counsel.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
24. Supervision notes are to be kept by the supervisor and also noted in the file including, the dates of file reviews and advice given by the review counsel.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
25. There is a Bring Forward system in order to ensure that advice given by the review counsel is followed.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
26. Review counsel must authorise any new matters/clients prior to any work being done on the matter or for the client.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
27. A review counsel is available for consultation during all hours of intake.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
28. Summary advice is reviewed by a lawyer before it is given out.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
29. Adequate contact information is collected to allow Review counsel to correct mistakes when advice or information is given without prior review	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

III. SUPERVISION

30. OTHER

III. SUPERVISION

COMMENTS:

ACTION NEEDED IN THIS AREA:

DATE: -----

Improvement Plan

AREA III. SUPERVISION

What key things do we want to achieve in the next year	What resources do we need	Sources of Assistance	What activities will we undertake	Who is responsible	Timelines

Date: _____

IV. CLIENT RELATIONS

1. Screening process exists to determine whether the matter should be dealt with by SLASS or referred to other agency or legal service provider.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
2. The screening process determines whether an appointment is needed and makes arrangements for the appointment with a caseworker within a reasonable time.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
3. The intake system is timely and takes into account the urgency of the matter.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
4. Initial information is recorded so that work is not duplicated by caseworker.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
5. Intake materials exist to assist the person who does initial screening.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
6. Materials are regularly updated.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
7. Intake materials include information about other agencies.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
8. Intake materials contain up to date lists of lawyers and areas of law in which they practise.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
9. Intake materials contain reference materials, which assist the caseworker in gathering relevant information.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
10. Intake materials include relevant information kits and brochures.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
11. Intake materials contain information on how to deal with emergencies.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
12. Intake materials contain information about SLASS case selection criteria and priorities.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
13. Referrals received and given are recorded.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
14. The SLASS has a written policy and procedure to determine whether to assist a particular client would create a conflict of interest.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
15. SLASS has a list of current and former clients.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
16. SLASS has a list of adverse parties.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
17. Both lists are checked before advice is provided.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
18. The fact that a conflict search has been done is documented on the intake sheet.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

IV. CLIENT RELATIONS

19. The procedure is documented in an intake manual or other office procedural manual.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
20. All legal staff and students are trained to recognise client conflicts of interest.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
21. The SLASS has a written policy which addresses conflicts of interest if the Dean or Review counsel are potential adverse parties.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
22. Confidentiality requirements are documented in intake and other relevant office procedures manuals.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
23. Discussion of confidential client information in the reception area is minimized.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
24. Receptionist's computer screen is not visible to clients, or visitors.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
25. Interview areas are private.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
26. Files and file documents are not accessible to visitors.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
27. When appropriate, friends or relatives of clients are asked to leave the interview room.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
28. Open and closed files are stored in a secure location such as in a locked filing cabinet.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
29. Documents that identify clients or contain client information are disposed of in a manner that prevents disclosure (e.g., shredding before disposal).	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
30. The SLASS has a written policy on confidentiality.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
31. All staff are aware of the confidentiality policy and it is part of orientation for new staff members, students, members of the governance body, translators, and volunteers	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
32. The policy requires that staff, governance members, students, and translators are required to sign a confidentiality agreement or undertaking	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
33. Reception areas and interview rooms are comfortable and attractive.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
34. Telephones are answered courteously.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
35. Offices are located near public transportation.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
36. The SLASS, inside and out, is as free of physical barriers as possible.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

IV. CLIENT RELATIONS

37. Where people are unable to attend the SLASS for other reasons such as a handicap, lack of transportation, or incarceration, the SLASS finds reasonable methods of accommodating them.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
38. The SLASS makes reasonable efforts, commensurate with its resources, to provide services to people in their primary language.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
39. Written materials are made available in languages in common use in the community.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
40. Where the SLASS provides service to people in their primary language, this fact is advertised in the client community and on the SLASS' voicemail message where applicable.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
41. The SLASS makes use of telephone technology to be accessible to the public outside the hours of operation	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
42. The SLASS has equipment, or is aware of resources, to allow communications with clients who are deaf or hard of hearing such as Bell Relay systems or a referral relationship exists with the Canadian Hearing Society.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
43. The hours of operation are selected taking into account the needs of the community.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
44. The SLASS has CLEO pamphlets in the areas of law needed by the community and keeps them up-to-date.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
45. The SLASS governing body has developed a plan to ensure reasonable levels of service to existing clients and for emergencies during periods when student caseworkers are not available.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
46. ACCESSIBILITY POLICIES				
• The SLASS has a written policy addressing hours of operation.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
• The policy has provisions relating to telephone access.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
• The policy has provisions relating to voicemail use.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
• The policy has provisions relating to clients who are unable to come into the SLASS.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

IV. CLIENT RELATIONS

• The policy has provisions relating to language barriers.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
• Practice conforms to policy	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
47. There is a written policy on how complaints are handled.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
48. The policy provides for notice of its existence including notification of it posted in the reception area	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
49. The policy permits both clients and non-clients to complain.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
50. The subject matter of complaints is not unduly restricted.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
51. The complaint procedure is user-friendly, and is free from unnecessary barriers.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
52. The complaint procedure provides for complaints to the Dean at some point in the procedure.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
53. Clients and visitors to the SLASS are given timely notice of the right to complain and procedure for doing so.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
54. Complaints are addressed promptly and courteously and the SLASS's response addresses the issue(s) raised by the complainant.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
55. The Dean receives reports on all complaints to the SLASS.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
56. The SLASS addresses problems in its delivery of services that have been brought to its attention by clients	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
57. The SLASS has a written computer policy, which states the uses to which computers can and cannot be used, including use of the Internet.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
58. The computer use policy contains guidelines to protect against computer viruses.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
59. The SLASS has a policy for the archiving and deletion of computer files which is followed in practice.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
60. The SLASS uses its technology to increase efficiency.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

IV. CLIENT RELATIONS

61. Legal reference materials are adequate for the SLASS's needs.

YES

NO

Working on it

N/A

62. OTHER

IV. CLIENT RELATIONS

COMMENTS:

ACTION NEEDED IN THIS AREA:

DATE: -----

Improvement Plan

AREA IV. CLIENT RELATIONS

What key things do we want to achieve in the next year	What resources do we need	Sources of Assistance	What activities will we undertake	Who is responsible	Timelines

Date: _____

V. DELIVERY OF LEGAL SERVICES

1. Intake sheet or other record of initial contact with a person requesting assistance, is filled out with sufficient information, including contact information, sufficient facts recorded to identify issue.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
2. Under review counsel's supervision, legal and non-legal options are explained to the person requesting assistance and documented on the intake sheet.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
3. Appropriate referrals were made.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
4. Calls were returned promptly, and the date and time of all attempts to contact the caller are recorded.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
5. All actions by the caseworker are recorded in sufficient detail.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
6. Any further action required is recorded and a BF system exists to ensure follow-up.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
7. Supervision is noted on intake sheet	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
8. Incoming mail is date-stamped.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
9. Reviewer can identify the issues.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
10. Reviewer can readily tell what happened on file.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
11. For each client a separate file is opened for each unrelated problem and cross-referenced.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
12. Appropriate use made of sub-files.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
13. Materials clipped together or attached to file.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
14. There are memos to file.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
15. There are adequate transfer memos.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
16. Adequate notes of steps taken.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
17. Notes are dated.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
18. Record of original documents received and returned.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

V. DELIVERY OF LEGAL SERVICES

19. Record of telephone calls made/received.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
20. Docket showing dates of work done, action taken, time spent.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
21. Supervision is evident in the file.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
22. The SLASS has written guidelines on file organisation and file management.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
23. The policy requires that all communications be documented in the file.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
24. The policy contains guidelines for the opening, transfer, and closing of files.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
25. The policy contains guidelines for adequate communication with clients.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
26. Practice conforms to policy	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
27. An opening checklist or form is filled out.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
28. Intake/Summary advice record is on file.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
29. Financial eligibility form is completed and on file.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
30. Financial information is verified in writing by client for example on the retainer or other form.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
31. Authorization forms are signed, dated.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
32. Closing checklist is filled out or there is a closing memo which collects relevant administrative information such as outcome, supervision, costs, total hours spent on the file etc	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
33. The SLASS has a written financial eligibility policy.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
34. The criteria address assets, income, and household size.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
35. The policy clearly states who qualifies under the financial eligibility requirements and who is exempt.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
36. The policy has guidelines and a procedure for discretion with respect to financial eligibility and reporting requirements to the Dean or Dean's delegate regarding the	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

V. DELIVERY OF LEGAL SERVICES

exercise of this discretion.				
37. Practice conforms to policy	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
38. There is written retainer for each matter in which the SLASS is providing representation.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
39. The retainer explains the nature of the SLASS and that students, under the supervision of a lawyer, may represent the client.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
40. The retainer clearly outlines the work being undertaken on behalf of the client.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
41. The retainer is explained to the client and signed by the client before representation is commenced.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
42. The retainer is in understandable language.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
43. It explains the circumstances under which it will end.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
44. A copy of the signed retainer is given to the client	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
45. The tickler system includes all limitation dates and appearances in legal proceedings.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
46. The tickler system includes sufficient numbers of reminders of each due date filed at appropriate intervals in advance.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
47. One person administers it and there is a designated back-up administrator.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
48. File reviews demonstrate that there is sufficient detail on tickler and tickler is kept in consistent location on files.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
49. The system ensures that Review counsel and the caseworker are aware of tickler dates.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
50. Interviews with all caseworkers and staff show that staff and students are aware of how the tickler system works.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
51. The tickler system is used consistently.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

V. DELIVERY OF LEGAL SERVICES

52. Limitation periods and hearing dates are not missed.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
53. Each legal worker maintains a desk calendar or other reminder system in conjunction with the central tickler system	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
54. Letters are answered promptly.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
55. Prompt follow-up on outstanding requests.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
56. Client telephone calls returned promptly.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
57. Other telephone calls returned promptly.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
58. Date of closing within appropriate time of last action on files	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
59. There are no undue delays in the casefiles	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
60. For each case, the client's objective is identified, the client is told whether the objective is achievable and within applicable rules of professional conduct, the client is told the limits of the assistance the SLASS has agreed to provide and told the probable costs to the client.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
61. Clients are kept informed.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
62. Clients copied on letters.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
63. Clients given written progress reports.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
64. Clients informed of settlement offers/positions of prosecutor, and instructions on settlement are obtained from the client which are confirmed in writing whenever possible.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
65. Adequate closing letter to client including summarizing action taken, result achieved, and advising client of any action he or she is required to take.	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
66. Clients requested to reimburse disbursements if appropriate	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A
67. The level of SLASS activity in any given year is not substantially lower than its level of activity in previous years unless there is a reasonable explanation for the	<input type="radio"/> YES	<input type="radio"/> NO	<input type="radio"/> Working on it	<input type="radio"/> N/A

V. DELIVERY OF LEGAL SERVICES

discrepancy.

68. OTHER

V. DELIVERY OF LEGAL SERVICES

COMMENTS:

ACTION NEEDED IN THIS AREA:

DATE: -----

Improvement Plan

AREA V. DELIVERY OF LEGAL SERVICES

What key things do we want to achieve in the next year	What resources do we need	Sources of Assistance	What activities will we undertake	Who is responsible	Timelines

Date: _____

Improvement Plan - SAMPLE

AREA: Section III – Supervision

What key things do we want to achieve in the next year	What resources do we need	Sources of assistance	What activities will we undertake	Who is responsible	Start	End
1. Improve orientation and training for students	<ul style="list-style-type: none"> ▪ Examples of other SLASS orientation and training agendas and materials 	<ul style="list-style-type: none"> ▪ QSO ▪ Other SLASS ▪ Law school 	<ul style="list-style-type: none"> ▪ Review examples, ▪ Draft orientation agenda ▪ Prepare materials ▪ Secure speakers 	<ul style="list-style-type: none"> ▪ Student orientation and training committee 	Jan 2006	Mar 2006
2. Develop a written student supervision policy	<ul style="list-style-type: none"> ▪ Examples of other SLASS supervision policies 	<ul style="list-style-type: none"> ▪ QSO ▪ Other SLASS 	<ul style="list-style-type: none"> ▪ Review examples ▪ Draft supervision policy 	<ul style="list-style-type: none"> ▪ Executive director & staff 	April 2006	June 2006
3. Develop guidelines to determine appropriate caseload for students	<ul style="list-style-type: none"> ▪ Examples of other SLASS guidelines for student caseload 	<ul style="list-style-type: none"> ▪ QSO ▪ Other SLASS 	<ul style="list-style-type: none"> ▪ Review examples ▪ Draft guidelines 	<ul style="list-style-type: none"> ▪ Executive director & staff 	Sept 2006	Oct 2006

Date: _____

SURVEY MONKEY LINK AND INSTRUCTIONS

The self-assessment tool reporting form was created in SurveyMonkey, an inexpensive webbased service. The www link provided below will take you to the form. Once dean and staff have engaged in the self-assessment process, a class can submit its results by completing the self-assessment webbased form. Should you have any questions or difficulties, please contact the QSO (416) 204-7130 qso@lao.on.ca

<http://www.surveymonkey.com/s.asp?u=800941486865>

A. How do I enter data?

Simply place your cursor over the selected button and click. Data can also be added to the text boxes.

B. Can I print off the survey?

Yes, after entering the results, use File / Print menu (Internet Explorer) to print individual pages. You'll need to use the print feature for *each page* captured on screen. Unfortunately, there is no functional capacity to print the entire survey by hitting the print button once.

C. Can I fill-out one part of the tool and then return to the tool at another time to complete it?

Yes, respondents that return to an incomplete survey will be taken to the point where they left off simply by clicking on the surveymonkey link above.

D. Can I go back and forth?

Yes, simply hit the Previous or the Next button at the bottom of the screen

E. How do I submit the results?

Simply hit the Submit button at the end of the tool once you've filled it out completely.

F. Can I keep a hard copy for my files?

Yes, you'll want to keep a hard copy. We'd recommend you print off each completed page of the survey before submitting it.

M:\QSO-Data\SLASS Self-Assessment Tool\SLASS Self-Assessment Tool FINAL.doc