

Data Collection Help Document: Definitions & Examples

Case Data	
Case Reporting Period	This is the standard 12-month reporting period for reporting case and client data. The Case Reporting Period is July 1, 2025 through June 30, 2026.
Categories of Law: Sort each closed case into one of the categories below.	
Advance Planning/Wills/Estates	Wills and estates, probate administration, powers of attorney for property, powers of attorney for health, living wills, transfer on death instruments, and other advance directives.
Consumer/Utility	Bankruptcy, debtor relief, collections, deficiency, garnishment, contracts, warranties, credit access, loans, installment purchase, unfair sales practice, repossession, and public utilities (including connections and shut-offs).
Criminal Records	Expungement, sealing, clemency, vacating cannabis convictions.
Education	School-related issues, including access to special education programs.
Employment	Job discrimination, wage claims and other work-related issues, excluding unemployment and workers' compensation.
Family	Dissolution of marriage, annulment, custody, visitation, child support, paternity, orders of protection, adoption, guardianship, termination of parental rights. Also includes pursuit of SIJS (Special Immigrant Juvenile Status) predicate orders in state court.
Health	Medicare, Medicaid, and other matters related to health insurance or access to health care.
Housing	Landlord/tenant, federally subsidized housing (including public housing and Housing Choice Vouchers), home ownership, mortgage foreclosures, and real property.
Immigration	Immigration, naturalization, asylum, deportation defense and related immigration matters, such as U visas.
Individual Rights	Rights of persons with mental, physical or developmental disabilities, rights of persons in institutions, civil rights of incarcerated persons, and civil no-contact orders.
Juvenile	Delinquency, neglect, or abuse matters.
Public Benefits	Temporary Assistance to Needy Families (TANF), SNAP benefits, Social Security, SSI, unemployment insurance, workers' compensation, veterans' benefits, black lung benefits.
Other	Incorporation, licensing (auto and other), torts, name change, Indian and tribal law, and other matters that do not fall within the categories listed above.
Case Handler: Sort each closed case by Case Handler	
Staff or Volunteer	Sort each closed case into either "Staff" if it was handled by lawyers or paralegals who are paid employees of your organization, or "Volunteer" if it was handled primarily by lawyers or paralegals who are not paid employees of your organization.
Levels of Service: Sort each closed case by Level of Service	
Brief Services	Legal counsel and advice and/or other brief service including drafting of simple legal documents and preparation of documents for client to use on a <i>pro se</i> basis, and comprehensive legal screenings to determine eligibility for immigration relief. Please do not include information & referral numbers.
Representation without Litigation	On behalf of individual clients: Extensive research, preparation of complex letters or other legal documents; negotiation with third parties; extensive transactional work.
Administrative Hearing	Representation in formal proceedings and/or hearing before an administrative agency.
Full Representation	Representation in court proceedings.
Open Cases	
Total Currently Open Cases	Do not break open cases down by category of law or level of service. Instead, provide one single number - the total number of cases that were open on the last day of the Case Reporting Period (June 30, 2026) . The purpose is to get a snapshot of the workload of your organization (i.e. open cases) on the final day of the case reporting period.

Staff and Board Data	
Category & Role	Sort your organization/project's personnel into the categories and roles below. Do not include information for consultants or independent contractors working on a limited-duration basis.
Board Members	If you have multiple boards, only count members of the board which most directly oversees the legal services of your organization.
Executive Director/CEO/Director of Legal Aid Project	The individual serving as the chief executive of the legal aid organization or of the legal aid project within a larger organization (e.g. social services agency, law school).
Senior Management Staff	Management-level staff who report to the executive director, e.g., deputy/associate/assistant director; chief operating officer; chief financial officer; legal director/director of advocacy; development director.
Managing/Supervising Attorney	Attorneys who directly supervise the work of other attorneys, as head of a department, practice group, project, or office.
Staff Attorney/Senior Staff Attorney	Attorneys who are not managing/supervising attorneys and who provide services to clients. Includes legal fellows (e.g., funded by Equal Justice Works) employed on a full-time basis.
Paralegal/Legal Advocate	Paralegals and other individuals (e.g., Department of Justice accredited representatives) who are not licensed attorneys and who are directly involved in providing legal services to clients.
Operational/Administrative	Individuals whose roles include fundraising, financial management, human resources, information technology, data analysis, marketing and/or other critical organizational functions.
Other Staff	Includes social workers, VISTAs, community navigators, and any other individuals employed by the organization in a capacity not listed in one of the categories listed above.
# Part-Time Staff Members	This is the total number of part-time staff members for each category. Count everyone in a given category who is not full-time, regardless of the exact number of hours they work.
Total # Staff Members (Include both full-time and part-time)	A person at your organization should be counted if they are a paid staff member on June 30 of the current calendar year. If the legal services project that LTF funds is part of a larger organization, only include staff who work on the legal services project funded by LTF. Only include current staff. Do not include volunteers, recently departed staff, anticipated new hires, or open positions.
Total Board Members	A person on your board should be counted if they are a member of your board on June 30 of the current calendar year. Only include current board members. Do not include recently departed board members, anticipated new board members, or open seats on the board.
# New Hires (July 1 - June 30)	The number of new board appointments or the number of new staff members hired into each of the above staff categories during the year ending June 30, 2026, even if they are no longer currently employed (i.e., if your organization had no paralegals last July, hired one in September and fired them in December, and you have no paralegals now, the number of new hires would be 1.)

Staff and Board Demographic Data	
Cisgender	A term used to describe a person whose gender identity aligns with the sex assigned to them at birth.
Transgender	An umbrella term for a person whose gender identity and/or expression is different from cultural expectations based on the sex they were assigned at birth. Being transgender does not imply any specific sexual orientation. Transgender people may identify as straight, gay, lesbian, bisexual, etc.

Identity "not listed"	Individuals should be recorded in this row if they have self-reported an identity that is not listed and that cannot be easily mapped to the listed options. In any demographic topic area (race/ethnicity, gender identity, sexual orientation) if your organization only asks individuals if they identify as a member of a minority group or not, record the number of minority identifying individuals in this row. If your organization collects a greater level of detail than is asked for and there are a number of identities which do not fit into our categories, record the remaining individuals in this row.
"Not disclosed" identity	The "not disclosed" categories are meant to capture individuals who have been asked to self-identify certain demographics but who have actively chosen not to do so. If there is no data from a staff or board member on a particular demographic topic, put them in this category as well.

Client Demographic Data	
Count	Record a single unduplicated client per case under each demographic topic. If you do not collect self-reported data on a certain demographic topic, enter "0" in the cells in that section. Use your best judgment to fill whatever data you have into our categories.
"Not disclosed" identity	The "not disclosed" categories are meant to capture individuals who have been asked to self identify certain demographics but who have actively chosen not to do so. If there is no data from an individual client on a particular demographic topic, put them in this category as well.

Financial Data	
Revenue Items: Sort your revenue sources into the categories below.	
Lawyers Trust Fund	Grants distributed by the Lawyers Trust Fund of Illinois, including special purpose and off-cycle grants.
Federal Government (Legal Services Corporation)	Grants distributed by the Legal Services Corporation, including basic purpose grants and special field grants.
Federal Government (Other)	Grants and contracts paid by any federal agencies other than the Legal Services Corporation, such as VOCA and VAWA grants distributed by the Department of Justice. Also includes funding originating from those agencies.
State Government (IEJF)	Grants and contracts paid by the Illinois Equal Justice Foundation.
State Government (A2J)	Grants and contracts paid by the Westside Justice Center or The Resurrection Project as part of the Illinois Access to Justice program.
State Government (R3)	Grants and contracts paid as part of the Restore. Reinvest. Renew. Program.
State Government (Other)	Grants and contracts paid by any Illinois agencies, such as the Illinois Attorney General, OTHER than the three standalone State Government categories (IEJF, A2J, R3). Also includes funding originating from those agencies.
Local Government	Grants and contracts paid by city and county agencies such as the Chicago Department of Family and Support Services. Also includes funding originating from those agencies.
Cy Pres Awards	Amounts distributed from residual funds in a class action or other type of case by order of federal or state court.
Law Firms	Grants paid by law firms, including revenue raised through contributions to events.
Foundations (NOT bar foundations), Corporations, United Way	Grants and contributions from foundations, charitable trusts, corporations, and corporate foundations. Also include grants or contributions from the United Way and similar workplace giving entities.
Individual Donors	Donations from individuals, couples and families. Include both event revenue and direct contributions. Also include donations from individual lawyers, unless clearly given under the auspices of a law firm.

Other Funding Sources	Contributions from all funding sources not listed in other categories. Examples include legal fees; other earned income; grants to support internships or fellowships (e.g., PILI, Equal Justice Works); honoraria; contributions from religious or civic groups; event income that is not otherwise classifiable.
Expenses Items: Sort your expenses into the categories below.	
Lawyers	The value of salaries paid to lawyers.
Paralegals	The value of salaries paid to paralegals.
Other Staff	The value of salaries paid to all staff other than lawyers and paralegals.
Employee Benefits	The cumulative cost of all employee benefits.
Other Personnel Costs	The cumulative cost of all other personnel related obligations such as insurance.
Total Non-Personnel Costs	The cumulative cost of all non-personnel related obligations such as rent, technology, and printing.