Legal Services National Technology Assistance Project

Helping nonprofit legal aid programs improve client services through innovative use of technology.

www.lsntap.org

Webinar: Technology Baselines Resources Sharing

Speakers:: William F. Guyton and Sart Rowe

Technology Planning Is About More than Hardware and Software

- Management of Client and Case Data
- Production and Supervision of Legal Work
- Records Management & Knowledge Management
- Intake and Telephonic Advice

Post Katrina in Alabama William was working to set up a call center and what he learned setting up that process it it takes an entire cross functional team. It takes lawyers, it takes tech people, it takes an entire team.

The organization should have at least 2 full-time technology staff or consultants per 100 FTE staff members

William has about 180 people on staff and has 3 FTEs. Any less than than that and you risk somebody getting sick or having an issue and having no solution.

Budgeting

1. ongoing maintenance and upgrade of hardware and software;
2. the personnel/consultants necessary to support and maintain the system; and
3. training in the use of technology.

Your budget should be somewhat constant, that way you aren't spending huge amounts to upgraded an antiquated system that isn't capable of being upgraded in part. Upgrade your

systems regularly.

We are so tech focused on the court level, on the legal services level. Being behind, puts clients at a disservice. You have to budget for disasters. What do you do if your office burns down? What do you do if you get hacked? That is part of why this exists, you have to articulate what the document is suggesting as a best practice.

Having a bulk process for setting up computer cuts down on time and cost and ensures you are deploying secure machines to your employees.

Case Management Systems

- Flexible
- Responsive
- Portable

All of WA is on Legal Server which is a great system. It makes it easy to transfer files, and I think there is a good case to be made for a standard for everyone to prevent issues.

The following capacities:

- Capture and retain client eligibility, case type, and other appropriate data at intake;
- Securely back up data in standardized data formats and, if required, move data to alternate systems
- Screen applicants for eligibility and appropriate case type
- Perform immediate conflict check
- Enter and edit information in the CMS in real time
- Securely and ethically transfer client and case data electronically to and from other service providers, provided that they have the appropriate technologies
- Generate reports and extract meaningful data for strategic planning, program evaluation and other purposes, including comparison reports and running historical data
- Ability to assign the appropriate funding source to cases and activity records
- Allow the end user to easily configure various aspects of the CMS software application

Supervision

- Calendering
- Document Production
- Timekeeping Supervision
- Data Online Research

Electronic Records

Confidentiality -Are your records secure and confidential and as safe (as possible) from leaks? Document retention - It is very important to not hold onto an data you don't need and destroy old data as soon as you no longer need. Nobody can steal something you don't have. Policies regarding access -

Knowledge Management

If you can find people to champion using drupal or sharepoint, the specific tools all have very good search but it is about making sure only good documents go up. People need to get in the habit of sharing with clients.

Legal Info: Websites

Limiting permissions means disabling features to limit the avenues of attack and reducing the potential damage. This includes things like not running in Admin and disabling remote access if it isn't needed.

Maintaining Backups

- One Copy is bad
- two copies is ok
- three copies is good

Do both on and off site backups. If you use a cloud backup service try to go with one Make sure to test your backups regularly to make sure they are still functioning and good.

Training

Community legal education presentations are supported by effective use of technology, such as online conferencing, videos, and other appropriate technologies.

Communications

- Create policy for email
- Use collaborative tools
- Have a tool for testing tech issues

Telephone Systems

- Routing by Language
- TTY or Relay
- Reporting on Busy & Dropped
- After Hours Message
- Consider Online intake

Become a Cyber Security Ninja

Click Here to see LSNTAP's webinar series on how to protect your organization's data and computer systems.

Selected Resources

LSC Baselines LSC Grantee Technology Systems Overview CSM Review Pages Assessing Security for your Nonprofit Triage & Expert Systems by Probono.net The Twenty-First Century Lawyers Evolving Ethical Duty of Competence Technology Planning Smackdown! Tactical vs. Strategic vs. Missional Nonprofit Technology Network (NTEN) Staffing & Investment Report Idealware's On Demand Tactical Technology Planning Tool

◁ LSC Tec Baselines 2015
◁ TIG Toolkit Information Security March 2018
◁ Tig Toolkit Callcenter September 2018
◁ Tig Toolkit Online Triage and Intake June 2018