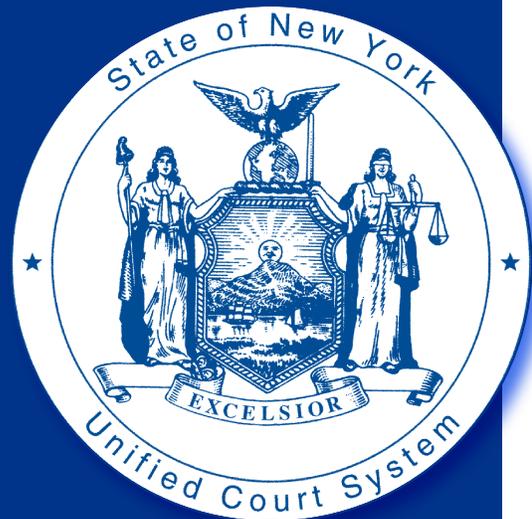


**INAUGURAL**

**STATEWIDE CIVIL LEGAL AID  
TECHNOLOGY CONFERENCE**

**THE ROLE OF TECHNOLOGY IN  
PROMOTING ACCESS TO JUSTICE AND  
COLLABORATION IN THE  
DELIVERY OF LEGAL SERVICES**



CONVENED BY THE  
**TASK FORCE TO EXPAND  
ACCESS TO CIVIL LEGAL SERVICES IN NEW YORK**

COLUMBIA LAW SCHOOL, NEW YORK

July 23, 2015



# STATEWIDE CIVIL LEGAL AID TECHNOLOGY CONFERENCE

THE ROLE OF TECHNOLOGY IN PROMOTING ACCESS TO JUSTICE AND  
COLLABORATION IN THE DELIVERY OF LEGAL SERVICES

JULY 23, 2015 • COLUMBIA LAW SCHOOL • NEW YORK

## AGENDA

**8:30–9:00 A.M.** REGISTRATION AND LIGHT REFRESHMENTS

**9:00–9:30 A.M.** WELCOME AND INTRODUCTION

ROOM 106

**Helaine M. Barnett** *Chair, Task Force to Expand Access to Civil Legal Services in New York*

**Avery W. Katz** *Vice Dean and Milton Handler Professor of Law, Columbia Law School*

### OPENING REMARKS

**Hon. Jonathan Lippman** *Chief Judge of the State of New York*

**9:30–11:00 A.M.** MORNING PLENARY:

ROOM 106

### INSPIRING EXAMPLES OF TECHNOLOGY INNOVATION

**Jeff Hogue** *Co-Chair, NLADA Technology Section*

This series of presentations will provide an overview of exciting technologies currently in use or within reach of the New York civil legal aid community.

**9:30–10:15 A.M.**

### NEW YORK TECHNOLOGY INITIATIVES

- Data Visualization & Dashboards (*Merritt Birnbaum, NYLAG*)
- Online Self-Help: DIY Court Forms, LHI & E-Filing (*Mike Williams, Bronx County Family Court*)
- Rich Self-Help and Virtual Consultations (*Mark O'Brien, Pro Bono Net*)
- Mobile/SMS Outreach with the Self-Represented (*Adriene Holder, The Legal Aid Society*)
- Lawyering in the Digital Age (*Conrad Johnson, Columbia Law School*)

**10:15–11:00 A.M.**

### NATIONAL TECHNOLOGY INITIATIVES

- Business Process Analysis and Expert Systems (*Rajat Basu, PhD, Honeywell [Ret.]*);  
Examples from Other States (*Glenn Rawdon, LSC*)
- Rechtwijzer Project & Online Dispute Resolution (*Glenn Rawdon*)
- Convergence - Reaching 100% by Scaling the Successes - Public/Private Partnerships to Tap the Latent Market and Leverage Start-Up Investments (*Ron Staudt, Chicago-Kent*)
- Law School Apps for Justice - Teaching 21st Century Core Competencies by Building Content and Tools for Statewide Legal Aid Websites (*Ron Staudt*)
- Convergence Gaps and Coordination (*Glenn Rawdon*)
- Statewide Planning - Highly Coordinated Examples (*Glenn Rawdon*)

**11:00–11:15 A.M. BREAK**

**11:15 A.M.-12:30 P.M. BREAKOUT SESSION ONE**

**1.A EXECUTIVE DIRECTOR BREAKOUT**

**ROOM 106**

**Lillian Moy** *Executive Director, Legal Aid Society of Northeastern New York and Member, Task Force*

**Peter Lesser** *CIO, Skadden Arps*

Executive Directors from civil legal aid providers and a CIO from a major law firm will discuss what they are doing and what they can realistically envision. What does technology offer to improve client services, program management and the efficiency of legal services? Panelists will discuss creating a cohesive vision for integrating technology into various aspects of organizational missions.

- Unified Consumer Portal (*Ken Perri, LawNY*)
- VoIP (Voice over Internet Protocol) in Intake (*Bill Hawkes, NLS*)
- Document Assembly (*Joe Kelemen, WNYLC*)
- Case Management (*Raun Rasmussen, LSNYC*)
- Sharepoint/Knowledge Management (*Sally Curran, Volunteer Lawyers Project of Onondaga County*)
- Pro Bono Tech Assessment (*Peter Lesser, Skadden Arps*)

**1.B TECHNOLOGY MANAGERS & CIO BREAKOUT**

**ROOM 107**

**John Greiner** *President, Just-Tech, LLC (Former CIO, Legal Services NYC)*

Technology managers, both accidental and intentional, come together to discuss the state of technology in their programs, including shared challenges, innovative projects, resources and purchasing.

- Pro Bono Tech Assessments (*Michael Donnelly, Simpson Thacher*)
- Document Management Systems (*Jeff Franchetti, Cravath, Swaine & Moore, LLP*)
- Technology Training (*John Attinger, Capensys*)
- Shared Technology Challenges (*Open Discussion*)
  - Change Management and Innovative Projects
  - Identifying the Right Free and Low-Cost Resources
  - Justifying, Measuring and Critiquing Tech Initiatives
  - Procuring IT Hardware, Services and Systems

**12:30-1:15 P.M. LUNCH & NETWORKING**

**1:15-2:15 P.M. BREAKOUT SESSION TWO**

**2.A SINGLE POINT OF ENTRY: ONLINE COORDINATION, TRIAGE & INTAKE**

**ROOM 107**

**Deborah Wright** *President, Local 2325, UAW; Chair, Task Force Technology Working Group*

An overview of the LSC Summit Report vision for “single point of entry” with highly coordinated intake, referral services and resources will be presented, along with a look at how New York is incorporating these ideas.

- Overview of LSC Summit Report and the Vision for Intelligent Seamless Routing of People and Problems Extending Beyond Online Intake (*Glenn Rawdon, LSC*)
- Use of Online Intake Tools in NYS: An Update to the 2013 Technology Survey (*Christine Fecko, IOLA Fund*)
- Examples of Online Triage/Intake Projects (*Anna Hineline, LawNY*)
- Bakersfield, CA Project (*Brian Donnelly, Columbia Law School*)

## 2.B TECHNOLOGIES THAT SUPPORT PRO BONO AND REMOTE DELIVERY

ROOM 106

**Sally Curran** *Executive Director, Volunteer Lawyers Project of Onondaga County*

How technology can assist with recruiting, training, managing and delivery of pro bono programs, including the remote delivery of legal services.

- Volunteer Recruitment and Screening
  - Built-in Salesforce: Pro Bono Volunteer Applicant Screening (*Adam Heintz, Legal Services-NYC*)
- Online Training and Support of Pro Bono Attorneys and Law Students
  - CLARO Project (*Joe Keleman, WNYLC & Conrad Johnson, Columbia Law School*)
    - Online Training
    - Document Assembly on the Spot for Clients
  - Law Student Pro Bono: Fair Hearing Bank (*Conrad Johnson*)
  - Online Training: Surge Docket Training for Immigration Court (*Conrad Johnson*)
- Online Intake and Case Development or Document Drafting
  - Pro Bono Online Questionnaires for Case Building (*Bryan Babcock, VLSP*)
  - Bankruptcy Preparation (*John Greiner, Just-Tech*)
- Remote Delivery of Pro Bono Service
  - LiveHelp - Law Student Pro Bono (*Leah Margulies, LawHelpNY*)
  - Reaching Rural Clients with Video Conferencing and Remote Document Drafting (*Sally Curran, Bryan Babcock*)

2:15-2:30 P.M. BREAK

2:30-3:30 P.M. BREAKOUT SESSION THREE

## 3.A COLLABORATION, SHARING AND PLANNING FOR TECHNOLOGY IMPROVEMENTS

ROOM 107

**Anna Hineline** *Technology Coordinator, LawNY*

**Darrin Lawson** *Technology Manager, Hiscock Legal Aid Society*

Focusing on collaboration, presenters will provide examples of the resources available to further integrate technology into legal services, including the necessary planning (business process analysis or business intelligence) and the challenges that can naturally arise in collaborations.

- Who's Who in Legal Services Technology
  - Existing Resources (*LSNTap, LSTech, NYSTech, NTEN, TIGs*)
  - What Can We Do as a Community to Better Communicate about Technology?
- Picking a Project that Best Meets the Needs of Your Staff and Clients
  - Evaluating Systems and Efficiencies: Business Intelligence and Expert Systems to Avoid Automation of Inefficient Processes
- Choosing the Right Partners
  - Identifying the Goals: Navigating Divergent Views of Good Change
- Project Sustainability and Planning
  - Assessing the Availability of Resources to Continue Projects
- Training
- Challenges with Collaboration

### 3.B GATHERING AND USING DATA

ROOM 106

**Merritt Birnbaum** *Chief Administrative Officer, NYLAG*

The panel will introduce methods for gathering and using the myriad data collected to evaluate and increase services, including how funders drive data collection, how programs use data to inform service delivery and the supervision of legal services.

- **Funder Perspective** (*Veyom Bahl, Robin Hood Foundation*)
  - Which Data Points Interest Robin Hood Most and Why?
  - Key Robin Hood Metrics for Legal Services and How They are Applied
- **Agency Perspective** (*Laura Haring, NYLAG*)
  - Deciding What to Measure for External & Internal Purposes
    - What Information do Funders Want?
    - What Information do Supervisors Want or Need to Manage Programs More Effectively?
  - Tools for Data Management
    - Using Excel-based Dashboards and Pivot Tables to More Easily Visualize and Analyze Data
  - Analysis and Reporting
    - Trend Tracking to Inform Program Priorities, Grant Reporting, Fundraising Appeals, Legislative Advocacy, etc.
- **Broader Impact** (*Wilneida Negron, Data & Society Research Institute*)
  - What Role can Legal Services Data Play in Larger Efforts to Raise Awareness about Social Issues and Support Civil Rights?
  - How Legal Aid Data can be Combined with Public Data to:
    - Inform Legal Services Deliveries
    - Enhance the Statewide Legal Service Delivery Capacity
    - Better Integrate Legal Aid into Existing Community-Based Service Delivery Systems through Increased Triage Service Delivery Models
  - Developing Measurement Standards
  - Using Data Mining and Predictive Analytics
  - Data-Driven Advocacy and Leveraging Data for Outreach

3:45-4:45 P.M.

### CLOSING PLENARY

ROOM 106

**Christine Fecko** *General Counsel, IOLA Fund*

**Michael Mills** *Neota Logic, Inc.*

**Rajat Basu** *PhD, Honeywell (Ret.)*

The conference facilitators will report out the key points from their sessions and a panel will reflect on next steps for the New York civil legal aid community. Together, they will ask how New York can move forward to implement the ideas considered during the conference.

4:45-5:00 P.M.

### CLOSING REMARKS

ROOM 106

**Helaine M. Barnett** *Chair, Task Force to Expand Access to Civil Legal Services in New York*

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# The Task Force to Expand Access to Civil Legal Services in New York

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