



2016 Statewide

# CIVIL LEGAL AID TECHNOLOGY CONFERENCE

The Role of Technology in  
Promoting Access to Justice

Convened by the New York State  
Permanent Commission on Access to Justice

New York Law School, June 23, 2016



2016 STATEWIDE

# CIVIL LEGAL AID TECHNOLOGY CONFERENCE

#A2JTECHNY • [HTTPS://NYSTECH2016.SCHED.ORG](https://nystech2016.sched.org)

8:30–9:00 AM	REGISTRATION AND LIGHT REFRESHMENTS	LOBBY
9:00–9:15 AM	<b>WELCOME AND INTRODUCTION</b> <b>Helaine M. Barnett</b> , Chair, New York State Permanent Commission on Access to Justice; President, Legal Services Corporation (2004-2009) <b>Anthony W. Crowell</b> , Dean and President, New York Law School  <b>OPENING REMARKS</b> <b>Hon. Janet DiFiore</b> , Chief Judge of the State of New York	AUDITORIUM
9:15–10:30 AM	<b>MORNING PLENARY</b>  <b>INSPIRING EXAMPLES OF TECHNOLOGY INNOVATION</b> <b>Facilitator: Jeff Hogue</b> , Community Relations and Operations, LegalServer; Co-Chair, NLADA Technology Section  This series of presentations will highlight exciting technologies currently in use or within reach of the New York State civil legal services community. <ul style="list-style-type: none"><li>• <b>Statewide Access Portal Project</b> Glenn Rawdon, Program Counsel for Technology, Legal Services Corporation</li><li>• <b>Online Consumer Portal Pilots</b> Christopher Schwartz, Deputy Director, Legal Hotline &amp; Legal Assistance for the Self-Represented, City Bar Justice Center Anna Hineline, Technology Coordinator, Legal Assistance of Western New York</li><li>• <b>Pro Bono Law Firm IT Initiative and Training Pilot</b> Michael Donnelly, Chief Information Officer, Simpson Thacher &amp; Bartlett LLP</li><li>• <b>Privacy by Design</b> Ari Waldman, Associate Professor and Director, Innovation Center for Law and Technology, New York Law School</li><li>• <b>Human-Centered Design to Build Tools for Access to Justice</b> Bill Cromie, Director of Emergent Technology, Blue Ridge Labs @ Robin Hood</li></ul>	AUDITORIUM

10:45–11:45 AM

## CONCURRENT BREAKOUT SESSION ONE

**1.A. MEETING CLIENT NEEDS WITH USER-FRIENDLY ONLINE TOOLS**

AUDITORIUM

**Facilitator: Anna Hinline**, Technology Coordinator, Legal Assistance of Western New York

Presenters will examine the importance of incorporating the user perspective in the design, usability and fitness of online information and tools. Topics will include user interface design, user goals and needs, user testing and addressing service gaps.

- **Aligning Potential Projects with User Needs**  
Jeff Hogue, Community Relations and Operations, LegalServer;  
Co-Chair, NLADA Technology Section
- **Surprises in Real World User-Testing**  
Rochelle Klempner, Chief Counsel, NYS Courts Access to Justice Program
- **User-Interface Evaluations**  
Tony Lu, Product Manager, Immigration Advocates Network, Pro Bono Net

**1.B. GATHERING AND USING DATA**

CONFERENCE CENTER

**Facilitator: Christine Fecko**, General Counsel, New York State IOLA Fund

This panel will explore the benefits to the civil legal services provider community of sharing data and creating uniform data standards, including better data collection, improved resource allocation and support for increased private funding.

- **Data to Support Evidence-Based Research**  
David Udell, Executive Director, National Center for Access to Justice and Visiting Professor, Cardozo Law School
- **Uniform Data Standards in Statewide Online Access Systems**  
Wilneida Negron, Project Manager, Florida Justice Technology Center
- **Toward Openness and Interoperability of Information-and-Referral Systems**  
Greg Bloom, Chief Organizing Officer, Open Referral Initiative
- **Philanthropy's Approach to Data**  
Shawn Morehead, Program Officer, New York Community Trust

11:45 AM–1:00 PM

LUNCH

CONFERENCE CENTER

## LEGAL TECH FAIR

FACULTY COMMONS

Tabletop demonstrations and discussions of innovative tech projects.

- **Advocate and Legal Services Assisted Document Assembly Programs**  
NYS Courts Access to Justice Program  
Rochelle Klempner, Chief Counsel  
Sun Kim, Special Counsel for Technology Initiatives
- **Citizenshipworks**  
Immigration Advocates Network  
Sandra Sandoval, Program Manager  
Tony Lu, Product Manager
- **Closing the Gap**  
Legal Aid Society of Northeastern New York  
Melody Harkness, PAI PBIF Coordinator  
Michael Grunenwald, Pro Bono Net
- **Innovations in Online Legal Screening and Triage Tools**  
Pro Bono Net  
Niki DeMel, Pro Bono and Special Initiatives Coordinator
- **Salesforce as a Management System**  
Volunteer Legal Services Project  
Bryan Babcock, Finance/Database/IT
- **Volunteer Management via Salesforce**  
Legal Services NYC  
Adam Heintz, Director of Pro Bono Services  
Nicole Jeong, Pro Bono Coordinating Attorney
- **WriteClearly/ReadClearly**  
Legal Assistance of Western New York  
Anna Hinline, Technology Coordinator

1:00–2:00 PM

**CONCURRENT BREAKOUT SESSION TWO - SECURITY AND TECH POLICIES**

Attendees to these sessions on technology security and sound technology policies will have the option to attend either a fundamental discussion or an advanced discussion, depending on their technical expertise and familiarity with the issues.

**2.A. FUNDAMENTALS OF SECURITY AND TECH POLICIES****CONFERENCE CENTER**

**Facilitator: Christopher Schwartz**, Deputy Director of Hotline and Legal Assistance for the Self-Represented, City Bar Justice Center

Topics to be discussed include a review of top threats to civil legal aid providers, data breach notification and liability issues, tips for determining who to follow on tech and security matters, basic security health checklists, and recommendations for leadership and tech policy setting.

- **Security Fundamentals**  
Michael Hernandez, Director of Consulting Services, Just-Tech
- **Technology Policies**  
Michael Donnelly, Chief Information Officer, Simpson Thacher & Bartlett LLP
- **Breach Notification**  
Tina M. Foster, Foster Law Firm

**2.B. ADVANCED TOPICS IN SECURITY AND TECH POLICIES****ROOM 220**

**Facilitator: John Greiner**, President, Just-Tech

Topics will include best practices in managing more secure internal and cloud-based environments, mobile and BYOD security issues, data breach risk reduction, developing security governance and audit capacities, and current trends in security.

- Scott Arciszewski, Developer, LegalServer
- Peter Lesser, Director, Global Technology, Skadden, Arps, Slate, Meagher & Flom LLP
- Joseph Melo, Director of Engineering, Just-Tech
- Mary O'Shaughnessy, Manager, Information Technology, Her Justice

2:15–3:30 PM

## CONCURRENT BREAKOUT SESSION THREE

### 3.A. TECHNOLOGY STRATEGIZING FOR PROGRAM DIRECTORS & SENIOR MANAGEMENT

CONFERENCE CENTER

**Facilitator:** **Christine Fecko**, General Counsel, New York State IOLA Fund

Participants will be able to choose to attend two of the 30-minute targeted conversations on topics of interest to directors and managers, as identified below. Each facilitated conversation will max out at about ten people, in order to allow for a one-on-one exchange of information and experience.

1. Managing Mobile Devices at Work
2. Change Management
3. Tech Planning & Budgeting
4. Project Management Planning & Tools
5. Tech Purchasing
6. Changes at LawHelpNY
7. Case Management Systems/Document Management Systems
8. Security
9. Document Assembly
10. Video Conferencing

### 3.B. ESSENTIAL TOPICS IN IT MANAGEMENT

ROOM 220

**Facilitator:** **John Greiner**, President, Just-Tech

Technology managers will discuss topics of importance to providers statewide, in order to enable them to navigate common challenges, and partake in innovative tech projects and new resources. The session will explore document management systems and technology training for advocates and support staff.

- **Document Management Systems**  
Ray Burke, Staff Attorney, Empire Justice Center  
John Roman, Director, Electronic Discovery & Information Technology Operations, Nixon Peabody  
Michael Donnelly, Chief Information Officer, Simpson Thacher & Bartlett LLP
  - Primer on Document Management Solutions (DMS)
  - The Value of DMS for the Legal Aid Community
  - Report Back on the Empire Justice Center's DMS Project

- **Technology Training for Advocates and Support Staff**  
Anna Hineline, Technology Coordinator, Legal Assistance of Western New York  
Gina Buser, Chief Executive Officer, Traveling Coaches  
Ellen Kearns, Technical Trainer, Wachtell, Lipton, Rosen & Katz
  - The Value of Professional Technology Training
  - The Challenges to Developing Effective Training Programs
  - New Statewide Training Initiatives

3:45–4:15 PM

**KEYNOTE ADDRESS****CONFERENCE CENTER**

**Seth Andrew**, Senior Advisor, Executive Office of the President, Office of Science and Technology Policy, The White House

4:15–5:00 PM

**CLOSING PLENARY****CONFERENCE CENTER**

**Moderator: Christine Fecko**, General Counsel, New York State IOLA Fund

Each facilitator will report out the key points from their sessions. The panel will then offer feedback on the day's conference and discuss ways to implement the technology priorities of New York's civil legal services community.

- Deborah Wright, President, UAW Local 2325; Chair, Technology Working Group, New York State Permanent Commission on Access to Justice
- Mark O'Brien, Executive Director, Pro Bono Net
- Shawn Morehead, Program Officer, New York Community Trust
- Glenn Rawdon, Program Counsel for Technology, Legal Services Corporation
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**CLOSING REMARKS**

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