

Civil Legal Service Providers Technology Survey

The Task Force to Expand Access to Civil Legal Services in New York was created by Chief Judge Jonathan Lippman in 2010 as part of his effort to establish a comprehensive approach to providing counsel to low-income New Yorkers in civil cases.

The Task Force's mission has two components. The first concerns the Chief Judge's annual hearings to assess the unmet needs for legal representation in civil legal proceedings involving fundamental human needs. The Task Force provides both support to the Chief Judge in preparation for the hearings and assistance to him in developing his report and recommendations to the Legislature and the Executive about the level of public resources necessary to meet those needs.

The second part of the Task Force's mission concerns the expansion of access to civil legal services and the improvement of access to justice generally. The Task Force will have ongoing responsibility to study, analyze and develop recommendations on all aspects of civil legal services to low-income New Yorkers; to issue recommendations for improvement; and to collaborate on access to justice issues, including expanded pro bono services and help for unrepresented litigants, with Hon. Fern Fisher, Deputy Chief Administrative Judge for New York City Courts, who also holds statewide responsibility for the court system's access to justice programs.

Civil Legal Service Providers Technology Survey

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The Task Force has issued this technology survey to all legal service providers assisting low-income New Yorkers, through which it seeks to:

- understand what technology is available to legal service providers, their advocates and their low-income clients,
- understand how legal service providers are managing their technology
- identify potential areas where improvements in technology access and utilization could increase the delivery and efficacy of legal services to low-income clients

Please answer this survey as honestly and fully as possible. Please try not to over-state or under-state your program's use of these technology tools. The survey results will be used by the Task Force to develop recommendations for the provider community on how to utilize technology opportunities to enhance delivery of client services. Please note that only aggregate data results will be shared.

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Provider Information

1. Provider Name:

2. Contact Person:

3. Phone:

4. Email:

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Section 1. Management/Executive Questions

Part A. Use of Technology for Advocacy

5. What legal research materials/tools do you provide or suggest to your staff? (Check all that apply)

- Lexis/Westlaw, other paid research services
- Free research services (e.g., Lawbox, Fastcase)
- Free legal community supported resources (e.g., materials maintained by Probono.Net, LawHelp, Empire Justice, and OnLine Resource Center, including the Health Law, Fair Hearing Bank and other sections hosted by Western New York Law Center ("WNYLC.net"))
- Email lists (e.g., listservs hosted by WNYLC.net)
- Traditional books and periodicals law library

Other (please specify)

6. Which tools does your organization use for collaborative document authoring? (Check all that apply)

- Word/WordPerfect with track changes emailed/on a network drive
- Google Docs
- Office 365
- GoToMeeting/similar web screen sharing
- SharePoint

7. Does your organization use a document assembly program, such as HotDocs (document assembly/document automation)? (Check all that apply)

- Pro se forms
- Staff/Advocate forms
- Pro bono forms
- None

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8. Does your organization use A2J Author (pro se document assembly/instructions)? (Check all that apply)

- Pro se forms
- Staff/Advocate forms
- Pro bono forms
- None

9. 1. How does your organization provide substantive legal information and education to the public and the self-represented? (Check all that apply)

- Through LawHelpNY.org
- Through our own website
- Through texting or other mobile technology

Other (please specify)

10. If you do not currently provide such assistance, what barriers prevent you from doing so?

11. Does your organization utilize online client intake (e.g., triage, full intake, etc.)? Please describe mechanism)

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12. If you do not currently provide such assistance, what barriers prevent you from doing so?

13. Do you have a Twitter account?

- Yes
 No

14. If yes, how does your organization use your Twitter account? (Check all that apply)

- Contact with staff
 Contact with clients
 Publicize organization to the community
 Reach diverse communities
 Disaster response

Other (please specify)

15. Who is authorized to Tweet from within your organization? (Check all that apply)

- Program Director
 Communications Director
 Managers
 Staff

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16. How often does your organization Tweet?

- Multiple times per day
- Once per day
- Several times per week
- Once a week
- Once a month
- Once every several months

17. Which languages does your organization Tweet in?

- English Only
- English and Spanish

Other (please specify)

18. Do you have a Facebook account?

- Yes
- No

19. If yes, how does your organization use your Facebook account? (Check all that apply)

- Contact with staff
- Contact with clients
- Publicize organization to the community
- Reach diverse communities
- Disaster response

Other (please specify)

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20. Who is authorized to post to Facebook from within your organization? (Check all that apply)

- Program Director
- Communications Director
- Managers
- Staff

21. How often does your organization post to Facebook?

- Multiple times per day
- Once per day
- Several times per week
- Once a week
- Once a month
- Once every several months

22. Which languages does your organization post to Facebook in?

- English Only
- English and Spanish

Other (please specify)

23. Do you have a YouTube Channel account?

- Yes
- No

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24. If yes, how does your organization use your YouTube Channel account? (Check all that apply)

- Contact with staff
- Contact with clients
- Publicize organization to the community
- Reach diverse communities
- Disaster response

Other (please specify)

25. Who is authorized to post to your YouTube Channel account from within your organization? (Check all that apply)

- Program Director
- Communications Director
- Managers
- Staff

26. How often does your organization upload videos to your YouTube Channel account?

- Multiple times per day
- Once per day
- Several times per week
- Once a week
- Once a month
- Once every several months

27. Which languages does your organization use when making YouTube videos?

- English Only
- English and Spanish

Other (please specify)

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28. Do you have a website account?

- Yes
- No

29. If yes, how does your organization use your website? (Check all that apply)

- Contact with staff
- Contact with clients
- Publicize organization to the community
- Reach diverse communities
- Disaster response

Other (please specify)

30. Who is authorized to post to content to your website from within your organization? (Check all that apply)

- Program Director
- Communications Director
- Managers
- Staff

31. How often does your organization post content to your website?

- Multiple times per day
- Once per day
- Several times per week
- Once a week
- Once a month
- Once every several months

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32. Which languages are used for your organization's website?

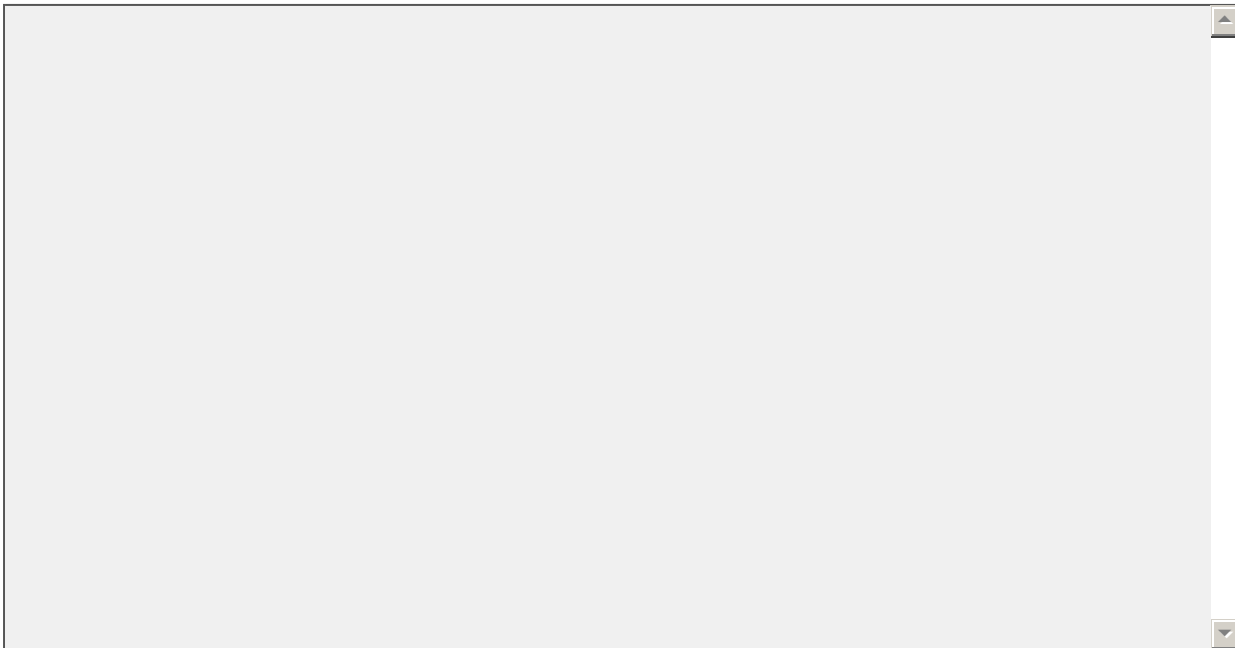
- English Only
- English and Spanish

Other (please specify)

33. Have you measured the impact of your social media efforts on the utilization of your client and community education services? If so, please describe.

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34. Have you used social media to assist with disaster relief? If so, please describe.



35. On average, how frequently does your organization submit substantive content to legal community supported resources (e.g., LawHelp, Probono.Net, Empire Justice, WNYLC)?

- Weekly
- Monthly
- Quarterly
- Annually
- Our organization does not regularly submit substantive content to LawHelp

36. Does your organization provide support to LawHelp?

Financial contribution
(amount in past year)

In-kind services (describe &
quantify)

37. Did your organization attend any LawHelp Consortium stakeholder meetings in past year?

- Yes
- No

Part B. Technology Training

38. Are technology skills and practices part of annual staff performance evaluations?

- Yes
- No

39. In the last year, how did you provide technology training to staff? (Check all that apply)

- Customized trainings developed for your program (e.g. Word skills relevant to your firm not generic Word training)
- Off-site generic trainings on common applications (word, excel, accounting)
- Periodic, informal trainings (e.g., monthly lunch and learn)
- Community supported webinars/online trainings (e.g. LSNTAP, NTEN, NPowerNY)

Other (please specify)

40. What is the average number of hours that most staff spend each year on technology training?

- Less than 2 hours
- Between 2-5 hours
- More than 5 hours
- N/A

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Part C. Technology Policies/Practices

41. What written technology policies does your organization currently have? (Check all that apply)

- Strategic Technology Plan
- Policy on using office equipment for personal use (e.g., Internet use, streaming media)
- Policy on using personally-owned equipment for work
- Policy on cell phone usage (personal for work and vice versa)
- Policy on syncing personal devices with agency-owned equipment
- Policy on the protection of electronically stored client data
- Electronic record retention policy
- Active Data/Network Security Practices (including software patching/update)
- Backup/Disaster Recovery

Other (please specify)

42. If you have a Strategic Technology Plan...

How often do you update it?

Is it part of your broader planning process?

43. If you have technologies policies, how do you train new staff and volunteers on the policies? (Check all that apply)

- Policies included in employee handbook or otherwise provided to new staff/volunteers
- Periodic training for supervisors
- Training included in new staff/volunteer orientation

Other (please specify)

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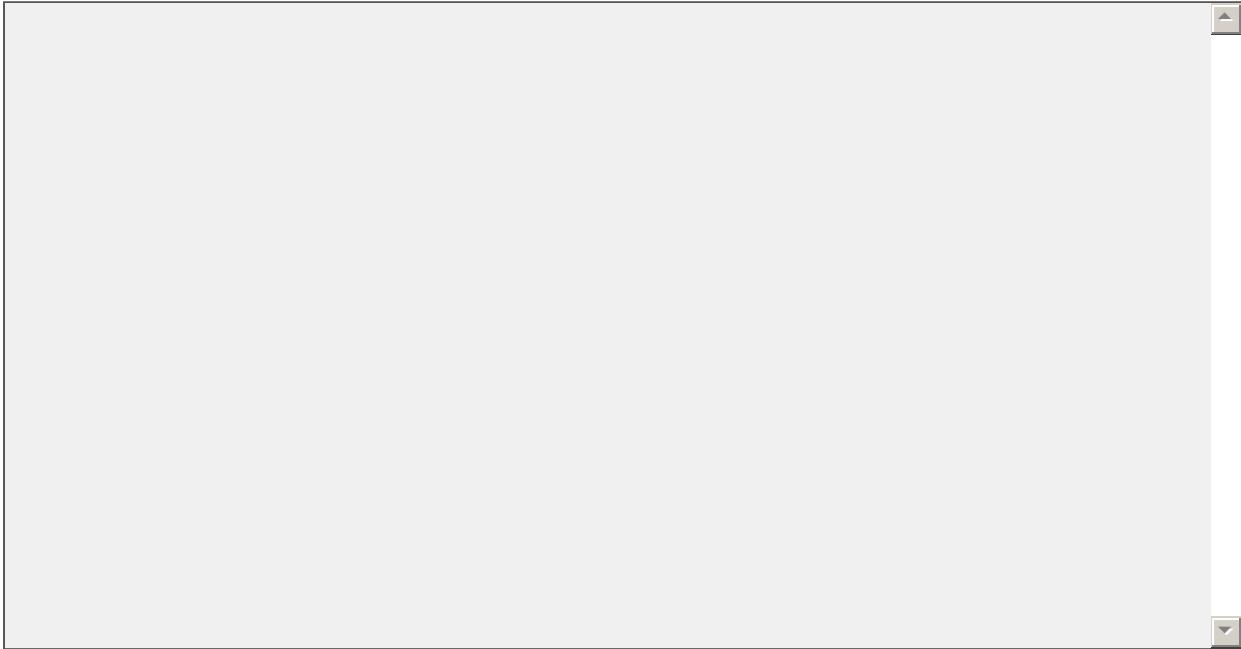
44. How do you on an ongoing basis ensure compliance with your technology policies? (Check all that apply)

- Audit by third party technology consultant
- Annual audit includes assessment of technology policies and compliance
- Ongoing review by your regular IT staff/outside IT consultants

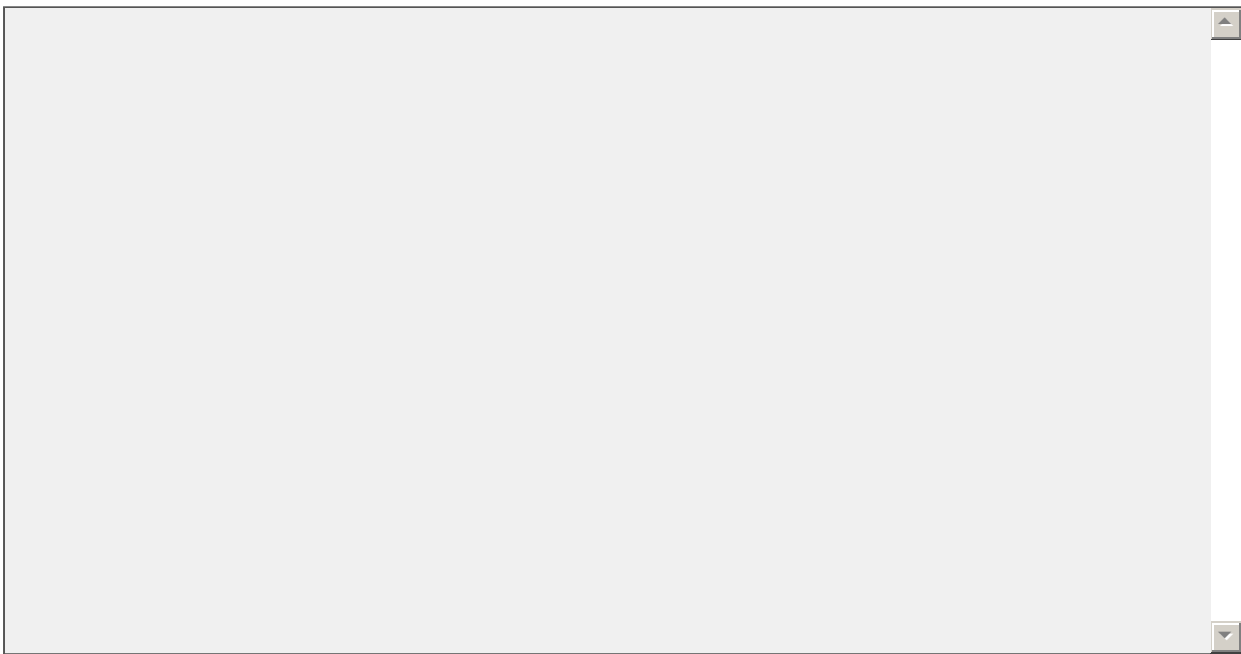
Other (please specify)

Part D. Technology Vision

45. Explain how you assess whether your staff and volunteers have the current technology skills and best use practices to maximize their productivity and quality. How often and do you reassess?



46. How does your organization currently use technology to enhance its service delivery (including mobile technology)?

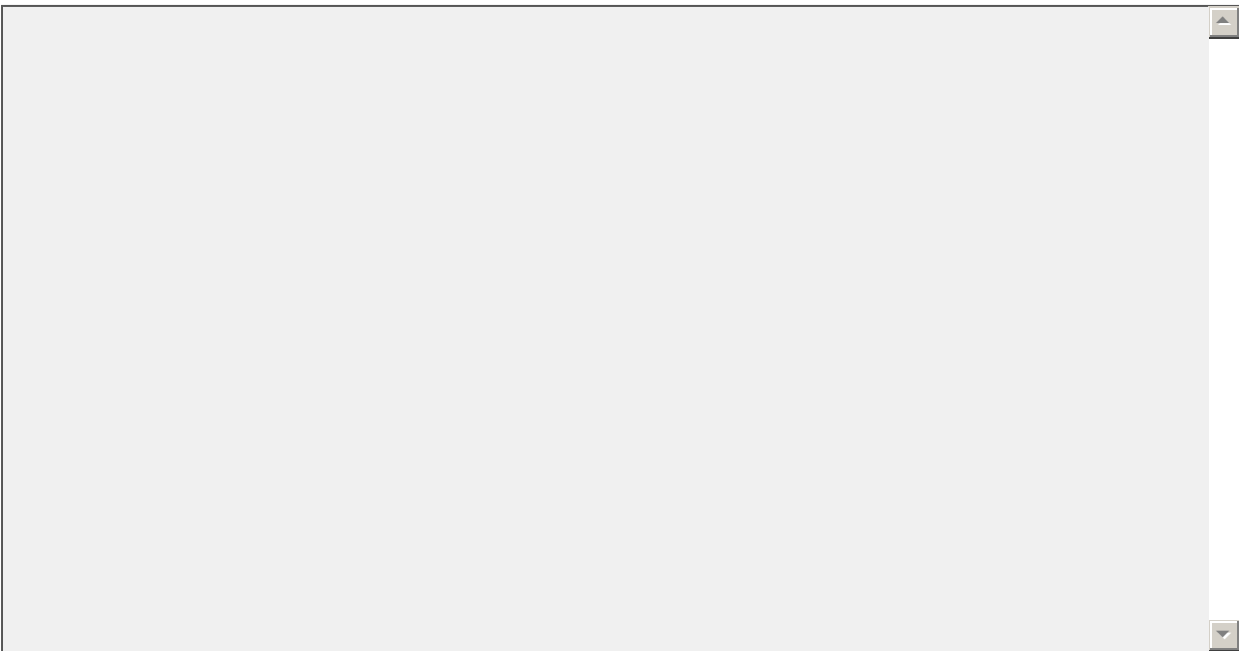


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47. Describe any major technology challenges or limitations that your organization faces.

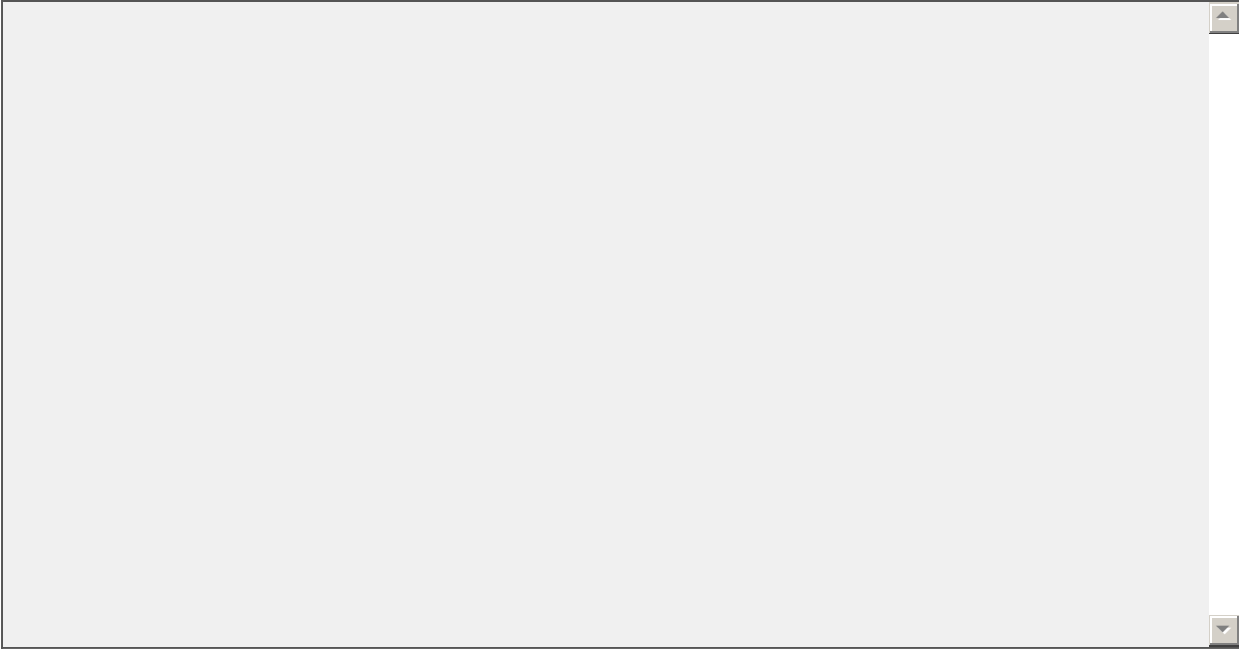
A large, empty rectangular text box with a light gray background and a thin black border. It is intended for the respondent to describe any major technology challenges or limitations that their organization faces. The box has a vertical scrollbar on the right side.

48. Describe any “tech dreams” for your organization.

A large, empty rectangular text box with a light gray background and a thin black border. It is intended for the respondent to describe any “tech dreams” for their organization. The box has a vertical scrollbar on the right side.

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49. Describe any “tech dreams” for the legal service community as a whole (e.g., collaborations, trainings, group purchasing, vendor and product reviews).



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Section 2. Finance Director/Administrator Questions

Part A. Technology Expense

50. What was your total operating budget for the fiscal year ending March 31, 2013?

51. On average, how much does your organization spend on personnel costs per year?

Internal Staff

Vendor/Contractor/Consultant

52. Does your organization currently have any staff allocated to technology services?

Yes (FTE)

No

53. How much did your organization spend on non-personnel costs for technology in the past year?

54. To the extent reasonably possible, provide an approximate breakdown of the OTPS expense into the following sub-categories:

Hardware (depreciation, equipment purchasing, equipment rental)

Software (operating system, email, word processing, accounting, CMS, time-keeping, other licensing fees)

Usage Fees (internet, legal research, mobile devices usage, mobile apps)

Website maintenance

Other (specify)

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55. Which cellular providers did your organization use and approximately how much did your organization spend on mobile device usage in FY2012-13?

AT&T	<input type="text"/>
Verizon	<input type="text"/>
Sprint	<input type="text"/>
T-Mobile	<input type="text"/>
Boost Mobile	<input type="text"/>
Virgin Mobile	<input type="text"/>
MetroPCS	<input type="text"/>
Straight Talk	<input type="text"/>
Other	<input type="text"/>

56. Did your organization have any significant technology projects in FY 2012-13?

- Yes
- No

57. If so, please describe the project and quantify.

58. Inclusive of any significant technology projects, approximately how much did your organization spend in capital funds on technology in FY2012-13?

Part B. Technology Operations

59. Is there a dedicated technology support service provided to staff/volunteers (e.g., helpdesk)?

- Yes
- No

60. If so, how is it provided?

61. How do you currently acquire technology (hardware, software, telecommunications services, etc.)? (Check all that apply)

- Donated new
- Donated used
- Tech Soup
- Purchase on the retail market
- Purchase through government/public contracts
- Purchase through private collaborative purchasing plans

62. Approximately how many organization-owned mobile devices (e.g. smart phones, cellular connected tablets/laptops, mobile hotspot, usb/cellular cards) does your organization use?

Managers	<input type="text"/>
Staff	<input type="text"/>
Volunteers	<input type="text"/>

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63. Does your organization partially reimburse staff who use their own mobile devices for work?

	Any advocate who wants to use such devices	Majority of our advocates	A select group of advocates
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 3. IT Professional Questions

Part A. Technology Infrastructure

64. If provided by your organization, which mobile devices do your staff use? Please provide version and approximate numbers.

Blackberry	<input type="text"/>
iPhone	<input type="text"/>
Android phone	<input type="text"/>
iPad tablets - with 3G/4G data	<input type="text"/>
Android tablets - with 3G/4G data	<input type="text"/>
Mifi/Mobile Hotspots	<input type="text"/>
USB/PC Card Cellular Data Card	<input type="text"/>
Other cell (specify)	<input type="text"/>

65. What operating system is your organization using? (Check all that apply)

- Windows 2000/XP
- Windows Vista
- Windows 7
- Windows 8
- Linux/FreeBSD/Solaris/Unix
- Mac OS X

Other (please specify)

66. If your organization is supporting more than one operating system, please explain.

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67. What email software is your organization using? (Check all that apply)

- MS Exchange On-site
- MS Exchange Hosted
- Outlook.com
- Office 365
- Groupwise
- Lotus Notes
- Gmail

Other (please specify)

68. If your organization is supporting more than one email platform, please explain.

69. What word processing software is your organization using? (Check all that apply)

- WordPerfect
- MS Word
- OpenOffice
- LibreOffice
- Google Docs
- Office 365

Other (please specify)

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70. If your organization is using more than one word processing software, please explain.

71. What accounting system is your organization using? (Please indicate which version)

Excel spreadsheets	<input type="text"/>
Sage / MIP NPS	<input type="text"/>
Quick Books	<input type="text"/>
Microsoft Dynamics GP	<input type="text"/>
Blackbaud	<input type="text"/>
Quicken	<input type="text"/>
American Fundware	<input type="text"/>
Fund EZ	<input type="text"/>
Other:	<input type="text"/>

72. What case management system (CMS) is your organization using? (Please indicate which version)

LegalServer	<input type="text"/>
PIKA	<input type="text"/>
Practice Manager	<input type="text"/>
Legal Files	<input type="text"/>
Kemps	<input type="text"/>
Salesforce	<input type="text"/>
TIME	<input type="text"/>
Other:	<input type="text"/>

73. Does your organization utilize virtualization (Check all that apply)

- Virtualize servers
- Virtualize workstations/desktops/end-user applications
- No

Part B. Connectivity

74. How are your organization's offices networked together?

- VPN over Internet
- Dedicated T-1

75. How are your offices connected to the Internet? (Please indicate Bandwidth (Kbps/Mbps))

ISDN	<input type="text"/>
T1/DS1	<input type="text"/>
T3/DS3	<input type="text"/>
ADSL/SDSL	<input type="text"/>
Cable Modem	<input type="text"/>
FIOS/Small Business Fiber	<input type="text"/>
TLS/ELAN Enterprise Fiber	<input type="text"/>
MPLS (over copper)	<input type="text"/>
Frame Relay	<input type="text"/>
Other	<input type="text"/>

76. How are your offices connected to the Intranet? (Please indicate Bandwidth (Kbps/Mbps))

ISDN	<input type="text"/>
T1/DS1	<input type="text"/>
T3/DS3	<input type="text"/>
ADSL/SDSL	<input type="text"/>
Cable Modem	<input type="text"/>
FIOS/Small Business Fiber	<input type="text"/>
TLS/ELAN Enterprise Fiber	<input type="text"/>
MPLS (over copper)	<input type="text"/>
Frame Relay	<input type="text"/>
Other	<input type="text"/>

77. Does your organization have an Intranet?

- Yes
- No

78. If yes, please describe how staff use your Intranet.

79. Does your organization give advocates Remote Access to your network?

- Citrix
- GoToMyPc
- Microsoft Terminal Server
- LogMeIn
- PC Anywhere
- VPN
- No
- Not applicable

Other (please specify)

80. How does your organization utilize videoconferencing? (Check all that apply)

- Client advocacy
- Judicial/administrative proceedings
- Internal communication
- Internal Training
- External Training
- Not applicable

81. What kind of video conferencing does your program use? (Check all that apply)

- Conference room style video conferencing equipment
- Desktop/laptop style video web conferencing (e.g., Skype, GoToMeeting, Google Hangouts)
- Video conferencing not available

Part C. Application and Data Management

82. How does your organization manage its application and data servers?

- On-site Only
- Off-site Only (e.g. LegalServer hosting your CMS)
- Both On & Off-site
- We have no dedicated servers

83. Does your organization use “cloud” applications for advocacy and/or administrative purposes? (Check all that apply)

- Case Management System (e.g., salesforce)
- Financial data (e.g., Quickbooks Online)
- Document drafting (Advocacy) (e.g., Office 365, Google Apps)
- Document drafting (Administrative) (e.g., Office 365, Google Apps)
- Online document sharing (eg., Dropbox, SkyDrive)
- Scheduling (Doodle, MeetingWizard)
- Spam/Virus Filtering (MailStore, MailFoundry, CudaMail)
- Backups/Archives (Mozy, Crashplan, Amazon, etc.)
- Telephone/VoIP (Google Voice, ShoreTel/M5, RingCentral,8x8)
- No

Other (please specify)

84. If you have off-site servers or technology services, have you negotiated specific contract language to ensure the confidentiality of and your control over the data?

- Yes, on all contracts
- Yes, on some contracts
- No

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85. If you have any additional comments, please indicate which question number you are referring to prior to your comments.

