

NYS Civil Legal Aid Technology Survey (2018)

This survey seeks (1) to explore how NYS civil legal aid providers are optimizing their client services through technology and (2) update some baseline information gathered in a 2013 survey. One response per organization, please.

* Required

1. **1. Provider Name ***

2. **2. Contact Person's Name ***

3. **3. Contact Person's Email ***

4. **4. Contact Person's Phone Number ***

Basic Technology Finance, Staffing & Systems

5. **5. For the fiscal year ending March 31, 2018, what was your total operating budget? ***

Organizations whose sole mission is the delivery of civil legal services should report their entire expenses. Organizations with multiple missions (e.g., criminal legal services or shelter services) should report only those expenses properly attributable to their civil legal services program.

6. **6. For the fiscal year ending March 31, 2018, approximately how much did your organization spend on personnel cost or routine consulting cost for technology? ***

Include employee and outside consultant costs only. Do not include special project consulting costs here. Include special project consulting costs below.

7. 7. For the fiscal year ending March 31, 2018, report the total number of full-time equivalent (FTE) paid technology employees. *

This question is trying to understand your human capital for supporting technology. If the organization uses consultants, please describe their role. If no employees or consultants are regularly allocated to technology, indicate N/A.

8. 8. For the fiscal year ending March 31, 2018, approximately how much did your organization spend on non-personnel/non-routine consultant costs for technology? *

Include cost of hardware, software, licensing, special project consultant costs.

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

Check all that apply.

- Customized trainings developed for your program (e.g. Word skills relevant to your program 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, or via a bar association)
- Part of new-employee orientation or on-boarding
- Learning Management System (e.g., Traveling Coaches)
- Web-base subscription training services (e.g., Lynda.com)
- The organization doesn't offer or pay for formal technology trainings, but permits or encourages staff to seek training on an ad hoc basis.
- None of the above.
- Other: _____

10. 10. What is the average number of hours that a typical, non-IT staff member spends annually on formal technology training? *

Mark only one oval.

- Less than 5 hours
- More than 5 hours
- Unknown. The organization doesn't track this information.

11. 11. What written technology policies does your organization currently have? *

Mark only one oval per row.

	Policy in Place - Revised since 2013	Policy in Place - Last Updated Before 2013	Developing the Policy Now	Interested in Developing	No Policy in Place
Strategic Technology Plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy on using office equipment for personal use (e.g., Internet use, streaming media)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy on using personally- owned equipment for work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy on cell phone usage (personal for work and vice versa)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy on syncing personal devices with agency-owned equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy on the protection of electronically stored client data	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Electronic record retention policy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Active Data/Network Security Practices (including software patching/update)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Backup/Disaster Recovery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. 12. Please indicate which case management system your organization currently uses. *

Check all that apply.

- Casemap
- ClientTrack
- Filemaker (custom)
- JusticeServer
- Kemps
- Legal Files
- LegalServer
- Microsoft Access Database (custom)
- Microsoft Excel or other spreadsheets
- PDCMS
- PIKA
- Practice Manager
- Salesforce (Custom)
- TIME from WNYLC
- Other: _____

13. 13. Does your organization use video conferencing for any of the following purposes? *

Check all that apply.

- Client triage/Intake
- Client advocacy
- Judicial/administrative proceedings
- Internal communication
- Internal Training
- External Training
- Pro Bono Program
- The organization does not have video conferencing.
- Other: _____

14. 14. Which of the following services your organization uses are cloud-based? *

Mark only one oval per row.

	Cloud-based, moved there sometime since 2013.	Cloud-based, not sure when it was put there.	Service used, but unsure if it's cloud-based.	On-site (not in the Cloud).	Service not used.
Case Management System (e.g., Salesforce, LegalServer)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial data (e.g., Quickbooks Online)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Document drafting (e.g., Office 365, Google Apps)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Online document sharing (eg., Dropbox, OneDrive)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scheduling (e.g., Doodle)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Spam/Virus Filtering (e.g., Barracuda, ESET, MailFoundry)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Backups/Archives (Mozy, Crashplan, Amazon, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone/VoIP (Google Voice, 8x8, ShoreTel, RingCentral)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Language Access

15. 15. In how many languages are your organization's public-facing tools (website, online intake, chatboxes) presented? *

Having instant machine translation available on your English language website does NOT count as having a two language website.

Mark only one oval.

- One Language
- Two Languages
- More than Two Languages
- Other: _____

16. 16. How do you create translations of electronic and printed information? (check all that apply) *

Check all that apply.

- Internal staff
- Google Translate or other automated translation service
- Professional Translators (paid or pro bono)
- Machine Translation with Human Review
- Other: _____

Online Service Delivery

This section is asking about online triage, intake, referral, self-help, assisted help, consultations, and other service delivery.

17. 17. Which online consultation tools do you use? (check all that apply) *

Check all that apply.

- Closing the Gap
- Citizenshipworks
- Upsolve
- DaisyDebt
- JustFix.nyc
- None
- Other: _____

18. 18. Are you using any kind of public-facing online intake, triage, or referral system? *

This question is asking about web-based systems that collect basic client information for possible program eligibility, priority assessment, referral destination assessment and intake.

Mark only one oval.

- Yes *Skip to question 19.*
- No *Skip to question 31.*
- Not really, but we have a link or a form on our website that generates a staff email that leads to an intake. *Skip to question 31.*

Details about Online Referral, Triage, Intake

19. 19. What kind of online intake, triage, or referral system(s) are you using? (Check all that apply.) *

Check all that apply.

- Static form (e.g. Google Form, fillable PDF)
- Our case management system's public facing tools (e.g., LegalServer)
- Expert system (e.g., A2J Author, Neota Logic, Drupal)
- Interactive system (e.g., LiveChat)
- Other: _____

20. 20. What practice areas are covered by your online system? Check all that apply. *

Answers correspond to IOLA Legal Benefit categories.

Check all that apply.

- All subject matters
- Consumer/Finance inquiries
- Education inquiries
- Employment inquiries
- Family inquires
- Juvenile inquiries
- Health inquiries
- Housing inquiries
- Income Maintenance inquiries
- Individual Rights inquiries
- Immigration inquiries
- Miscellaneous Benefits inquiries
- Other: _____

21. 21. Does your system collect legal problem information? *

Mark only one oval.

- Yes, broad categories (e.g., housing, family)
- Yes, detailed legal problem codes (e.g., eviction, housing repair, order of protection, custody)
- Yes, detailed information beyond legal problem codes (e.g., nonpayment eviction)
- No
- Other: _____

22. 22. Does your system collect adverse party names from users? *

Mark only one oval.

- Yes
- No

23. 23. Does your system collect information about income eligibility? *

Mark only one oval.

- Yes, broad information about total household income
- Yes, detailed information for all household members, including income types, frequencies, and exclusions
- No

24. 24. Does your system allow clients to electronically upload relevant documents? *

Mark only one oval.

- Yes
- No

25. **25. Are you able to electronically transfer client information to the destination referral organization so that the information doesn't have to be re-entered? ***

Mark only one oval.

- Yes
- No

26. **26. Does your online system provide any legal information and self-help tools that are based on the user's input? ***

Mark only one oval.

- Yes
- No

27. **27. If Yes to Question 26, which information and self-help tools does the system provide? (check all that apply)**

Check all that apply.

- Information Drafted By Our Staff Members
- LawHelp Interactive Online Forms
- LawHelpNY Information
- NYS CourtHelp (including DIY Forms)
- Information or Tools Authored/Hosted on Other Websites
- Other: _____

28. **28. Was your online system developed or is it operated in collaboration with other legal service providers or legal tech vendors (e.g., JustFix.nyc)? ***

Mark only one oval.

- Yes
- No

29. **29. If Yes to Question 28, identify the collaborators that you've worked with on your online system.**

30. **30. Would you be interested in collaborating with additional civil legal aid providers with your online system?**

Mark only one oval.

- Yes
- No
- Maybe

Narrative Questions (optional)

31. **31. Describe any significant technology projects undertaken by your organization during the fiscal year ending March 31, 2018.**

32. **32. Aside from financial, describe any major technology challenges or limitations that your organization faces.**

33. **33. Describe any successes or challenges you face in technology-related collaborations with community stakeholders (e.g., libraries, social service providers, 2-1-1, faith leaders). This includes the collection and integration of local data, trends, outcomes, emerging needs, etc.**

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

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