New York State Permanent Commission on Access to Justice
2023 Civil Legal Aid Technology Survey

The [New York State Permanent Commission on Access to Justice](#) invites you to complete its 2023 Civil Legal Aid Technology Survey. **The deadline for submissions is Tuesday, May 16**.

Survey Instructions:

- Only one survey can be submitted by an organization, although you may need to consult with your finance, program, and/or technology colleagues to answer all the questions.
- We strongly encourage you to use this PDF to gather and plan your responses so that you can complete the survey online in one sitting.
- The survey platform allows users to save and return later to modify previously drafted answers and complete the survey. To do this, however, completed sections must be saved and the survey must be accessed from the same browser, on the same computer, on the same network, and without clearing the browser cache.
- A copy of your completed survey will not be sent to you.
- Answer this survey as honestly and fully as possible. Try not to overstate or understate your responses.
- Contact cfehringer@iola.org with any questions.

About the Survey

The [survey results will be used](#) by the Permanent Commission to understand the current state of your technology usage, to assess gaps, learn about successful projects and systems to share with the wider community, facilitate collaborations, help plan future conferences, training and initiatives, and address technology infrastructure funding needs. Please note that only aggregate data results will be shared.

All responses will be anonymous to our survey partner, the Legal Services Corporation's Office of Data Governance and Analysis, who will be receiving and analyzing the data.

* 1. To begin the survey, please enter the unique 4-digit respondent ID your organization received via email below.

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General Information

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* 2. For the fiscal year ending March 31, 2023, what was the total operating budget of your **organization** overall?

Please enter your budget as a number, with no comments or additional text.

[   ]

* 3. For the fiscal year ending March 31, 2023, what was the total operating budget of your **civil legal services program**?

Please enter your budget as a number, with no comments or additional text.

[   ]

* 4. For the fiscal year ending March 31, 2023, how much (in actual expenditures) did your **organization** spend on personnel or routine consulting costs for technology? If exact figures are not available, professional approximations are appropriate.

Please enter your expenditures as a number, with no comments or additional text.

[   ]

* 5. For the fiscal year ending March 31, 2023, how much (in actual expenditures) did your **organization** spend on non-personnel/non-routine consultant costs for technology? If exact figures are not available, professional approximations are appropriate.

Please enter your expenditures as a number, with no comments or additional text.

[   ]

* 6. For the fiscal year ending March 31, 2023, report the total number of full-time equivalent (FTE) paid in-house technology staff.

Please enter your FTE as a number (decimals are permitted), with no comments or additional text.

[   ]

* 7. In what technologies are you planning to invest in the next five years and why?

[   ]

* 8. In what technology area(s) does your organization most urgently need additional funding? *Select up to 3 options.*

- [ ] Client outreach (e.g., improving program website, legal kiosks)
- [ ] Communications systems
- [ ] Cybersecurity
- [ ] Data management and storage
- [ ] Data sharing and referral networks
- [ ] Hardware and equipment
- [ ] Other (please specify)

[   ]

- [ ] N/A - We do not need additional technology funding.

- [ ] Routine maintenance of tech
- [ ] Software, including web-based tools and applications
- [ ] Technology staff
- [ ] Technology training

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* 9. **Prior** to the start of the COVID-19 pandemic (March 2020), did any staff from your civil legal services program work remotely at least some of the time?

Staff should be considered as "working remotely" if they worked from their homes or other off-site locations (excluding legal clinics, partner organization sites, etc.), regardless of how frequently this occurred.

◯ Yes

◯ No

◯ Not sure

* 10. Which of the following best describes the **current** operating status of your civil legal services program?

◯ Fully on-site - All staff typically work from an office or other designated work site.

◯ Hybrid - Some staff work remotely on a regular basis *and/or* some staff work remotely full-time.

◯ Fully remote - All staff typically work remotely from their homes or other off-site locations (excluding legal clinics, partner organization sites, etc.).

* 11. Is your civil legal services program planning to change its operating status in the near future? If so, how and why?

Ex. "We are changing from [current operating status listed above] to [new operating status] because [reason]."

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Training, Policies, & Cybersecurity

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Technology Policies & Governance

* 12. Which of the following written technology policies are **currently** in use by your civil legal services program? *Check all that apply.*

☐ Access management policies (i.e., when and why different individuals have access to your technologies & information)

☐ Business continuity plans (BCPs) or continuity of operations plans (COOPs)

☐ Change management policies (i.e., the processes required to request, develop, approve, and implement changes within your technology infrastructure)

☐ Data/systems backup and recovery

☐ Guidelines on using personally-owned equipment for work purposes

☐ Guidelines on using program-issued equipment for personal purposes

☐ Records management, including policies for governing permissions, maintaining confidentiality of client information, and record retention

☐ Technology incident response planning (e.g., in case of cyberattacks)

☐ Other (please specify)

☐ None of the above

* 13. Please describe any changes your civil legal services program has made to its technology policies as a result of the COVID-19 pandemic.

* 14. Which of the following cybersecurity features does your civil legal services program utilize? *Check at least one option per row.*

	Used prior to COVID-19	Currently using	Not in use
Active data and network security practices (including software patching/updates)	☐	☐	☐
Advanced mail security features (e.g., phishing detection)	☐	☐	☐
Endpoint threat detection and response / vulnerability scans	☐	☐	☐
Firewalls	☐	☐	☐
Minimum password requirements	☐	☐	☐
Mobile device management (e.g., the ability to remotely wipe a lost/stolen device)	☐	☐	☐
Multi-factor authentication	☐	☐	☐
Network segmentation	☐	☐	☐

* 15. What does your civil legal services program currently perceive as its **biggest** cybersecurity threat?

○ Challenge of routine maintenance of technology

○ Data breaches from third-party vendors or partner organizations

○ Insider threats

○ Lack of necessary cybersecurity resources due to insufficient funding

○ Other (please specify)

○ Malware

○ Negligence or mistakes by staff

○ Phishing attacks

○ Unexpected emergencies (e.g., natural disasters)

16. What steps is your civil legal services program taking to address the threat identified above (in question 15)?

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Training, Policies, & Cybersecurity

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Staff Technology Training & Support

* 17. On which of the following cybersecurity topics do your civil legal services program staff currently receive training? *Choose one response per row.*

	Mandatory training provided	Non-mandatory training resources provided	Currently do not offer
Business continuity plans (BCPs) or continuity of operations plans (COOPs)	○	○	○
General best practices in security awareness (e.g., passwords/authentication, using public Wi-Fi or removable media)	○	○	○
Malware	○	○	○
Mobile device security	○	○	○
Records management, including policies for governing permissions, maintaining confidentiality of client information, and record retention	○	○	○
Social engineering attacks (e.g., phishing)	○	○	○

Other (please specify)

[   ]

* 18. In the past year, how did you provide cybersecurity training (mandatory or non-mandatory) to your civil legal services program staff? *Check all that apply.*

☐ Community-supported webinars or online trainings (e.g., LSNTAP, NTEN, NPowerNY, local bar associations)

☐ External in-person or live virtual trainings provided by professional training groups

☐ Learning management system trainings (e.g., Traveling Coaches)

☐ Live in-person or virtual trainings provided by in-house staff

☐ New staff onboarding

☐ Web-based trainings provided by subscription training programs (e.g., KnowBe4)

☐ Written guidance or recorded trainings created by in-house staff

☐ Other (please specify)

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[                                                            ]
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☐ N/A - Currently, we do not provide cybersecurity training.

* 19. Please describe any changes your civil legal services program has made since the start of the COVID-19 pandemic to technology training & support for staff who work remotely.

"Remotely" meaning that program staff are working from their homes or another off-site location. If your staff worked remotely at some point during the pandemic but are no longer doing so, please provide any changes that occurred during that time.

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Technology Solutions

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* 20. What are the **top 3** barriers at your organization to integrating new technology solutions? *Select up to 3 options.*

- ☐ Available options are too complicated
- ☐ Available options don't integrate well with existing systems or workflows
- ☐ Budgetary constraints / insufficient funding
- ☐ Challenges in organization's change management process
- ☐ Concerns about security of new solutions

- ☐ Insufficient resources (e.g., time, staff) to explore or implement new technology options
- ☐ Lack of a well-defined technology strategy in place
- ☐ Organizational culture does not support uptake of new technology
- ☐ Staff do not have time to train on new technologies
- ☐ Unclear how new technologies can improve organization efficiency/effectiveness

- ☐ Other (please specify)

[   ]

* 21. Does your civil legal services program currently use any of the following? *Check all that apply.*

☐ Internal instant messaging system (e.g., Slack, Teams, Zoom, Google Chat)

☐ Project management tools (e.g., Basecamp, Trello, Asana)

☐ Remote work monitoring (e.g., WorkCamp, TimeCampzilla, RemoteDesk, etc.)

☐ Ticketing system (e.g., Jira, Zendesk, ConnectWise) for IT support

☐ Tools for automated decision-making (e.g., ChatGPT)

☐ None of the above

* 22. Does your civil legal services program store any information in servers based on-premises?

○ Yes

○ No, all of our information is maintained in cloud-based storage

○ Not sure

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* 23. Who manages the on-site servers used by your civil legal services program on a day-to-day basis?

◯ In-house technology staff

◯ General technology contractor/consultant

◯ Product-specific support service or contractor (i.e., a representative from the server vendor)

◯ There is no one designated to manage the servers on a day-to-day basis

◯ Other (please specify)

[ ]

* 24. What backup systems or procedures do you have in place for your on-site servers?

☐ On-premises backup

☐ Cloud or off-premises backup

☐ Other (please specify)

[ ]

☐ None of the above

Note: If your organization responds "No" or "Not sure" to Question #22 on the previous page, you will not receive questions 23-25 shown here. Instead, you will skip to Question #26.

* 25. Why are on-site servers a better solution for storing this information than cloud-based services? *Check all that apply.*

☐ Cloud-based storage is prohibitively expensive for our program/organization at this time.

☐ We have legacy data in on-site servers that would be prohibitively expensive and/or labor-intensive to move to the cloud.

☐ Our organization uses on-site servers for other areas of practice (e.g., criminal) so our civil legal services program uses it too.

☐ We have not yet found a cloud-based service that meets our technical needs for information storage.

☐ We have concerns about the security of cloud-based services.

☐ Other (please specify)

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Service Delivery

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Intake/Triage & Case Management

* 26. What method(s) does your civil legal services program use for **virtual** (i.e., not in-person) intake/triage? *Check all that apply.*

"Intake" is the collection of a potential client's information, which is used to determine client and case eligibility. An "intake method" is the vehicle through which your program collects relevant information necessary to determine whether an applicant will become a client, not necessarily how a client reaches you.

☐ Online intake system (form, chat, or similar tool that is connected to a case management system, or otherwise eliminates the need for staff to re-enter collected information into a case management tool)

☐ Calls via landline or internet (VoIP) telephone

☐ Video calls (e.g., Zoom)

☐ SMS texting

☐ Other (please specify)

☐ N/A – Our program only does in-person intake/triage or receives clients via referral.

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Intake/Triage & Case Management

* 27. What tools does your civil legal services program use for **online** intake/triage? *Check all that apply.*

☐ Public-facing tools built into a case management system (e.g., LegalServer)

☐ Expert system (e.g., A2J Author, Neota Logic)

☐ Interactive system (e.g., LiveChat)

☐ Static forms (e.g. Google Form, fillable PDF)

☐ Other (please specify)

* 28. Which sources of legal information or self-help tools does your civil legal services program's **online** intake/triage system recommend to users based on their input? *Check all that apply.*

☐ Information created by your civil legal services program staff

☐ LawHelp Interactive online forms

☐ LawHelpNY information or online forms

☐ New York Courts' CourtHelp, including DIY Forms

☐ Information or tools from other nonprofit entities (e.g., JustFix, Upsolve)

☐ Other (please specify)

☐ N/A – Our online intake/triage system does not provide any legal information or self-help tools based on the user's input.

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Intake/Triage & Case Management

* 29. Is your civil legal services program involved in a coordinated intake system or referral network that allows you to electronically transfer client information securely to another organization?

By "coordinated intake & referral", we mean that you are able to electronically transfer client intake information between organizations so that the information doesn't have to be re-entered.

○ Yes

○ No

○ Not sure

* 30. Which case management system(s) does your civil legal services program currently use to track case & client information? *Check all that apply.*

- ☐ Caseload Manager
- ☐ Clio
- ☐ Claris FileMaker
- ☐ JusticeServer
- ☐ Kemps

- ☐ LawLogix
- ☐ LegalServer
- ☐ Microsoft Access database
- ☐ Microsoft Excel, Google Sheets, or similar spreadsheet software
- ☐ PDCMS

- ☐ PIKA
- ☐ Salesforce
- ☐ WNYLC TIME Software

- ☐ Other (please specify)

[   ]

* 31. Which of the following tools are integrated or connected to the case management system used by your civil legal services program?

- ☐ Court docket system
- ☐ Document assembly / document automation
- ☐ Timekeeping
- ☐ Calendaring
- ☐ Human resources tools like staff payroll or time off requests

- ☐ Tools for recruiting or managing pro bono attorneys, paralegals, and other volunteers
- ☐ Pleading/brief banks or other legal research tools
- ☐ Reporting and data analysis tools (e.g., PowerBI, Qilk, Crystal Reports, Tableau)
- ☐ Integrated referral hub /coordinated legal or social care network (e.g., findhelp.org, uniteus)

- ☐ Other (please specify)

[   ]

- ☐ None of the above

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Language Access

* 32. How does your civil legal services program create translations of electronic or printed information? *Check all that apply.*

- [ ] Internal program staff fluent in other languages

- [ ] Google Translate or other automated translation service

- [ ] Professional translators (paid or pro bono)

- [ ] Other (please specify)

  [   ]

- [ ] N/A - Our program does not create translations of electronic or printed information.

* 33. In what languages **other than English** are each of the following resources available for limited English proficiency (LEP) populations?

Please note that having instant machine translation available on your English language website does NOT count as having a multilingual website. Please enter "N/A" if your program does not offer the resource listed, or does not offer it in languages other than English.

Online intake/triage systems

Website - Program-specific information (e.g., hours, locations)

Website - Legal information or self-help tools

Social media content

Chatbots

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Community & Stakeholder Outreach

* 34. How does your civil legal services program collect feedback from clients? *Check all that apply.*

- ☐ Text survey sent via automated process
- ☐ Online survey sent via automated process
- ☐ Text survey sent manually
- ☐ Online survey sent manually
- ☐ Mail-in survey
- ☐ Other (please specify)

- ☐ Phone-based surveys
- ☐ One-on-one interviews (in-person, virtually, or via phone)
- ☐ Focus groups

- ☐ N/A - Our program does not actively seek feedback from clients.

* 35. Which of the following features are included on the website for your civil legal services program? *Check all that apply.*

If your organization has multiple missions (e.g., civil, criminal, social services) with a shared website, please consider "website" to refer to the webpage(s) specific to your civil legal services program.

☐ Basic program information (e.g., hours of operation, office locations, services provided)

☐ Legal information

☐ Self-help materials (e.g., tip sheets, training videos, fillable forms)

☐ Information for pro bono attorneys, paralegals, or other volunteers on how to get involved with your program

☐ Mobile-friendly format

☐ N/A – Our civil legal services program does not have a dedicated website/webpage.

* 36. Which of the following social media platforms does your civil legal services program use to connect with your client communities, policymakers, and other stakeholders? *Check all that apply.*

If your organization has multiple missions (e.g., civil, criminal, social services) with shared social media platforms, please consider only those platforms that share content about your civil legal services program.

☐ YouTube / Vimeo   ☐ LinkedIn

☐ Facebook   ☐ TikTok

☐ Twitter   ☐ WhatsApp

☐ Instagram

☐ Other (please specify)

☐ N/A – We do not share content about our civil legal services program on social media platforms.

* 37. What do you perceive to be the **top 3 technology-related** barriers your civil clients face in accessing services or information? *Select up to 3 options.*

☐ Lack of access to internet (including limited data plans)

☐ Lack of access to devices (e.g., computers, smartphones)

☐ Discomfort or inexperience with using technology

☐ Lack of resources available for limited English proficiency clients

☐ Lack of accessible resources available (e.g., for individuals with sensory disabilities)

☐ Other (please specify)

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Additional Questions

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38. How has technology-specific funding for your organization changed since the start of the COVID-19 pandemic?

39. Describe any significant technology projects undertaken by your organization during the fiscal year ending March 31, 2023.