

3C Leadership and Technology: Two Years After the Pandemic Began
April 12, 2022

Lillian Moy:

Okay, so welcome to leadership and technology. This is a freewheeling 50 minutes about being a leader during the last two years, my colleagues here know that I'm boycotting the use of the word pandemic. And so for this little period of time, we're just going to refer to the last two years. So leadership and technology in the last two years, Margaret Wood is our behind the scenes helper. I'll just highlight for you our panelists today, all of them leaders and directors around the state, Sally Curran, the Executive Director of Volunteer Lawyers Project of Syracuse. Do you want me to say Central New York or CNY? You're good either way. Okay.

Sally Curran:

Either is totally fine.

Lillian Moy:

Sienna Fontaine, the Legal Director and General Counsel from Make the Road, New York and Adriene Holder. The Attorney in-Charge of The Legal Aid Society of New York City, the Civil Practice. And finally, Karen Nicolson, the CEO of CELJ, the Center for Elder Law and Justice. So welcome, we're going to try to make it happy and poppy. I'm Lillian Moy. I am the Executive Director of the Legal Aid Society of Northeastern New York. We wanted to ask those in the room to get a sense about the 52 of you in the room right now. Margaret, can you go to that next poll? Two years after and we asked this last year, I wonder if it will be different.

Tell us what your favorite tech tool is. Panel, we invite you to respond and audience. I invite you to respond as many times as you wish. It's easiest for me to do it by text, you text 22333, ElkeSorensen, who is generally speaking my assistant. She happens to be on vacation today. So Margaret is very lovingly providing the support instead. So you're going to text 22333, ElkeSorensen, 000, I don't know if I'm doing this right. 012, and then you'll be able to answer your favorite tech tool two years after. I don't know if people remember what their favorite tool was last year. I remember, but I'm not going to speak it until we've had a chance to respond and it can be whatever you want.

You can reflect, you can vote as many times as you want. You know what I say, you want to be a thought leader vote more than once. Ooh, Microsoft suite. If you want to say that you have to separate your words with an underscore for it to be read together. So let's see. Wow. Google used to be it huh, but now it's a big change. Okay. We're going to give you one a little bit more of a chance to vote. Margaret, you know how many votes we've had or you don't? Okay. Vote, vote, vote, be a thought leader. Margaret, we can close down the poll, I think,

and we'll see where the room is at, at the moment. Favorite tech tool. I think Zoom nosed out Teams there, Sally. I'm just going to say. Karen voted more than once. Didn't she? Because last year, I don't know if you all remember, but Teams was... Look at people are still voting.

Last year, Teams won as the most favorite tool of the pandemic one year in. Okay. So we got together and we did a little prep and Joanne who's wrangling us secretly. She hid her camera now. She said, is there a tech tool that recreates the water cooler and Margaret, you can go to the next one. And there's nothing to do with age, Karen. Okay. You guys was that in the chat or was that in the text mail chain? Oh, that was in the chat. Wasn't it? Okay. I actually don't think loving a tech tool has to do with age. I really don't. I don't think so. Although there was a member of the panel that said their favorite tech tool that recreated the water cooler was a Text Chain. I'm not going to name them.

And I'm not going to name them. But our esteemed colleagues said the tools that recreate the water cooler for them are Teams' chat, communicator app, some of us don't even know what that is, and a Text Chain. Most of us know what that is. A conference call, a Zoom call, a Salesforce chat, or you can put your own favorite tool that recreates the water cooler. And I suggest you vote soon. I do want to say a cautionary note about this one is, do we want to recreate the water cooler? I'm just saying is the... Oh, my God. Look at this group. This is the panel. Isn't it? The panel is voting.

Okay. Let's see. All right. Be a thought leader. What do you think recreates the water cooler? If you really... I guess this assumes that you do want to recreate the water cooler, that you believe that a spot in your physical office generated energy ideas, collegiality, Mark is saying Slack. Slack was last year, Mark. That's all I'm going to say but that sound has nothing to do with age. Okay. Look at Text Chain is getting a lot of votes, you guys. I don't know what's up with that. Oh, I'm just kidding. Adriene, are you voting or are you multitasking?

Adriene Holder:

I'm voting. I'm trying to make sure that I have all this stuff in.

Lillian Moy:

Look at Sienna, nobody is voting for Salesforce chat. I'm just saying, okay.

Sienna Fontaine:

Well, for the record, my answers shifted to Text Chain. I'm happy to share why, but I think it gives us a so much of what we're doing is on our phones. And it gives us access like I said to the great memes that create the jokes that continues to build that camaraderie with our folks. So we definitely appreciate a good Text Chain to keep conversations going.

Lillian Moy:

Okay. I don't want to say anything, but we have a pretty good Text Chain going on right now with the panel. Okay. Wait, is there anyone who's a little bit surprised by this response that the Text Chain nosed out Teams chat, nosed out Zoom Call, wait, nosed out Slack for sure. Because only... Oh, wait, Slack, Slack, Text Chain. People who have difficulty logging off from work after hours. Okay. As opposed to Teams chat. You don't have Teams on your phone?

Sally Curran:

I do, but you can choose to make it so the notifications don't pop up. I suppose you could do that with your regular text, but I reserve that for emergencies.

Lillian Moy:

So I feel like when I get a text, especially on a group text, doesn't it feel like an emergency? Is that isn't that why you're sending me a text? You really want me to call you, because it's urgent. I don't know. That's what it feels like to me. That's interesting. So would you say all of you that you wanted to recreate the water cooler? What did the water cooler used to give you these tools gave you instead? Sally, what the water cooler used to give you?

Sally Curran:

So, I mean, for me, it's not so much about the water cooler, but about the... We had a real environment of the open door office where people could walk around and poke their head in and check in with each other and felt like they could approach people, regardless of whether they're a manager or an intern or whoever, they could just poke their heads in and say, "Hey, how are you doing? What's going on?" We weren't like a big water cooler type office. But so for me, Teams is very much the open doors we ask that everybody be logged into Teams while they're doing their regular working hours and that they be, if they're not in meetings or working with a client that they'd be available to respond if need be. It's been great, really positive feedback.

Adriene Holder:

And if I can add, I think my staff has used Teams similarly to what Sally's talking about. It was when you say water cooler, I know it has different meetings for some people, but again, going outside of the idea of community, we had a lot of new people who we've onboarded during these two years and they don't know the folks in their offices. They meet them on platforms and there's like, get together on Zoom or Teams, but the Teams chat actually allowed people to say, "Oh, we just got a rescue dog, isn't he cute?" And then people would just pipe in and you would learn about people's like what they liked and on a personal level.

Adriene Holder:

The type of thing that people would, if they were together, if they were leaving court at the same time and they'd go have lunch before they returned to the office, or people would announce that they were pregnant and folks were like, "Oh, I have clothes that the baby can use." And that is the things that created that sense of community that we didn't have because we had so many new staff because of the expansion and housing who just had never met one another and never met their existing colleagues and Teams helped to do that. My folks also use Teams at the end of meetings to have like book clubs and conversations about interesting articles that had come out, especially during the reckoning of the summer of 2020.

Adriene Holder:

So I appreciated that from my staff. Text Chain is something I appreciate for some of my senior managers where we have our own group. And in lifetime during the Zoom can respond to each other and prompt each other to get more engaged in the meeting. So I like both-

Lillian Moy:

Brutal-

Karen Nicolson:

But Tina I'm going to be the Communicator person, because I think I'm the only one who uses that. But we do the same thing with the Communicator App and I'm not sure why Teams really never caught on in our office too much. I don't know if everybody else notices that like the first few days of the pandemic, there would be email chains where every single person in the office would reply all. And I mean, it was the same stuff that Adriene was saying, like trying to keep people's morale up. And we also had the, I have a lost dog I found and those, one was a lost cat, which my daughter adopted, but we had these really long reply all emails and then we switched over to communicator.

And I think that enables people to do the small group chats too. I'm with Adriene though. For my senior managers, we have a Text chat and I get that it's not ideal because people will start the chat at 7:30 in the morning or keep chatting at 6:30 at night. And it's not always me. In fact, it's very rarely me. So I think it was a Sally who said that it's hard to turn that off.

Lillian Moy:

Hey, Margaret, can we go... We had one last question before and Sienna, I don't know if you want to jump in on that at all or we're good. We have a question about for the audience. I think now we know where each of the panelists is on the question of how many of your staff is working remotely. So

this is just our fact gathering for those in the audience. Now there's 64 of you. This is a very popular panel. So same thing you can text 2233, Elke Sorensen, and you can tell us how many of your staff are. Oh, okay. Christine. Sorry. I don't think we... Well, you can be under 25%. Okay. That's all I can say. Let's see.

Interesting. So, okay. We're not quite as all over as I thought we would be. Seems like the majority by that, a majority 42% of those voting that's about 60 full from 5 of us, say you are 100% remote, A and D also pretty high, 42% together. And then 13% of us are at 75% remote. So, okay, Margaret, you can shut down this poll. And I wanted to ask the panelists, what's the impact then of remote work on your work culture? And is it affecting your current state of turnover or retention or wherever you're at? I know Adriene, you have had this very interesting experience of people leaving, not for the usual reasons. And I don't know whether that's a function of being two years into this state of being, what's going on?

Adriene Holder:

I don't know. I think we're still evaluating what's going on. I will say that there's a range of reasons why some of our staff in exit interviews are telling us why they're resigning. We have a group of people who just have reconsidered what they want to do. And like I have people going to pastry school and people who decided that they want to start their own business with their partner. And then we have some folks who've just decided that they don't want to live in the tri-state area and they've decided they want to start families. And they want to return to where maybe they came from where they have family or where there's a better standard of living. But there also have been curiously folks who want to be able to work remotely more and perhaps providing direct legal services, and the idea of having to go to court in person at certain times is not appealing. But then there's also, we have newer staff who wanted to go to jurisdictions where they could be in person more because they're saying again that they don't have the same connections that we take for granted. Many of us that have worked together for some years that we already have an established base of relationship and understanding of the culture of the organization. So I think working remotely has had the last two years Lilian, I know you don't want to say the P word, the last two years has had people rethinking how they want to live, where they want to live and what they want to do. But also working remotely has given people a range of understanding about whether they actually think that they'll thrive in that environment.

And I also want to make a big plug because I see a lot of people's had 100%, it was a stretch for us within the civil practice here at the Legal Aid Society to see if we could have some people work remotely, at least 100%, at least some part of a week or some part of a month. And I think we've really tried hard to get there. I wouldn't say we're quite at 100%, but we really have been rethinking

that because we realize with the people's commute times that, that not only could be a benefit for folks in terms of how they work, but also like in terms of childcare costs in terms of time away from family and stuff. And so we've really tried to think hard about that.

Again, working remotely is still an experiment for us and because of the way in which the courts have reengaged here in New York City and the three practices are so different criminal defense, juvenile rights and civil in terms of where we all appear. I wouldn't say that we have the full results of this new normal, not quite yet.

Lillian Moy:

So I thought you were going back to the office.

Adriene Holder:

We are going back to the office, but you said working remotely at least sometimes. Right?

Lillian Moy:

That's true. Yeah. At least sometimes.

Adriene Holder:

You didn't say full-time. So we have returned to the office, but it's in varying degrees depending on the practice area that you're in demands about clients and court appearances as well as job title. I have people that work on help lines that can be remote 100% of the time. I have people who do translations and other stuff less. And then you have the varying degrees all in between. So yes, but we are back in the office, but I still will say that what's happening in the courts is still an evolution for us here in New York City and how we're responding to it, I still don't want to tell you that I have iron clad conclusions for our organization yet.

Lillian Moy:

Yeah. Absolutely.

Sally Curran:

Lillian, can you take down the screen shared so I can see people's faces better?

Lillian Moy:

Oh, yeah. It'll just be us, Sally, you know that.

Sally Curran:

That's great.

Lillian Moy:

Okay. Margaret, can you not share the PowerPoint for a moment, but I know during our prep, what you said to me was that you were hybrid forever.

Sally Curran:

That's the direction it's going on. So we're a very small office for those who aren't familiar with volunteer lawyers, project of CNY, we... Oh my, this got crazy. Just stop the share, Margaret, just stop the share. So we currently have 19 staff members, I believe. And we're a little unique in that during the last two years, we actually haven't lost any staff, and we've just grown. Everybody has stayed except for one person who temporarily came in as a part-time helping us out and then went back to her regular job. And Margaret, we can see everything just so you know. It's always so embarrassing, I always worry that people don't realize we can see everything.

Joanne Sirotkin:

Actually can I offer a little technical support to Margaret, will that be okay?

Sally Curran:

That would be great.

Joanne Sirotkin:

Okay, Margaret, top right-hand corner, there is an arrow button that's up and then crossed out next to the leave button. Just yes. There you go. No. Still sharing. I just need you to unclick that. Perfect. Thank you, Margaret.

Sally Curran:

Beauteous.

Lillian Moy:

Thank you, Margaret.

Sally Curran:

Thank you, Joanne. Okay. So, we have had tremendous retention and I think part of that Lillian, is because I have had the good fortune of being able to really engage my staff in conversations about what felt safe and what didn't feel safe. And we've really been very responsive to that. So we are at this point hybrid, everybody comes in some and everybody stays home some. We've largely been basing that upon programmatic and client and community need. So for example, our eviction prevention team's in every morning because court's every morning, whereas our civic restoration team, they might only come in

when they've got client meetings or things like that. So we're trying to be really flexible and really equitable about it.

But I will say we have had, even though we're a small staff, I have had some of the staff of color raise the idea that working remotely reduced the amount of microaggressions that they had experienced either in the office or whether it's internally in our office or interacting out in the community, going to meetings, things like that. So that's something that we're actively looking at. How do we address as an organization to make sure that the office is truly welcoming and trying to reduce the amount of microaggressions that are existing? And I think that, that aligns actually really similarly with reports about remote learning. So I think that this might be a common theme.

Lillian Moy:

It is, although what I hear when in training external supervisors is that some law students don't have a comfort level about where they're living at the moment or people seeing their space. And so I think it does, our conversation is definitely necessary. Other people have raised that issue about fewer microaggressions since I'm not in the office, very disturbing. It's just a lesson to us all. Sienna, you said you were remote, but in, but both, right?

Sienna Fontaine:

Yeah. So, make the road for those we're in five different geographies and the legal work is just part of the work that our organization provides community organizing is really the heart of our work. And so we've run lots of different programs out of our office. And so from the very beginning, during the past two years, we'll stick with that-

Lillian Moy:

Thank you.

Sienna Fontaine:

We have food pantries and other kinds of services that have stayed open, kept our offices open, but really we kept it limited to the staff that were running those programs. And of course the organizing work has continued and we've had many more things to organize around in the last two years. So our organizers have been still mobilizing leading actions. A lot of our legal team provide legal observing and what we call action support. And so we've also been in step out on the streets with our folks in that way, but really the legal team has... When we're about 45 staff members across all five of our geographies, we are still mostly remote and most of our staff are still mostly remote, our offices have stayed apart from these special services closed to the public.

And we've been breaking things up into these different phases, we call them. And so we're now in a new phase where we are starting to be open to the public about four days a week, but we're not requiring legal staff to be in our legal staff are going in because they want to be in, want to get out of their houses, want to meet with clients. And in the past two years, our staff were extremely flexible and meeting clients at their houses, meeting clients in different places, doing whatever needed to be done to meet the client need. And so I think we're still in a wait and see and assessing how we go back into the office. I think another caveat is that we've always had very funky offices. We have community offices, we've got people cooking in a kitchen, we've got members and youth members running around and knocking on doors. And so we've had very hectic offices always and very tight space and currently our Queens office, we're building a new office. And so we've consolidated folks. So our space is tight and terrible in many ways.

Lillian Moy:

Yeah, girl. You're building a building in Queens?

Sienna Fontaine:

Yes, which we're very excited about.

Lillian Moy:

Nice. Congratulations.

Sienna Fontaine:

So we've always had to be flexible in how we organize our space. And so we're continuing to manage that where people are booking time in offices, it might not even be their office. It maybe it's an office that's closer to their house. So we're trying to just be as flexible as we can while recognizing that people are set up at home, we took a lot of pains to make sure that people have the equipment that they needed to be able to do all the things in the remote environment.

And so that will continue a as we move forward to some degree, but I don't think we yet have the full picture of how things are going to look when we're fully back and I think it won't be as I think, many of your programs all over the country. We won't go back to how we were right before the pandemic.

Lillian Moy:

How you were. Karen, you're a little bit of not an outlier, not an outlier, but a little different story. What is it for Center for Elder Law and Justice, CELJ?

Karen Nicolson:

So for CELJ, our clients are older adults. And when we get to the slides, you'll see some statistics I put up there about just the hostility towards using tech that many of our clients express to us personally. And that just statistically you can see nationwide, our business model and our funding sources require we do hospital visits, home visits, nursing home visits and outreach. Before the pandemic, we were doing three, 400 outreach events every year.

So, we were just really, I mean, the embedded in the community like Sienna is like we're a community based organization and that was our method of providing services. Having said that, obviously we set everybody up to do remote work once that everything shut down, but we started bringing people back as soon as we could. So I think it was in June, it was six, eight weeks after we were-

Lillian Moy:

Of 2020.

Karen Nicolson:

Yeah. It's so hard to remember back that far, right. But we started saying everybody get in one day a week and then two days a week and then three days a week. And we are now back five days a week as of July 1st. Obviously we make all kinds of exceptions our poor HR person, because she's a department of herself just got her assistant. She was just doing all these exception requests and people were exposed to COVID if their kids were exposed to COVID, if they were at childcare but she was making all these exceptions trying to sort and balance the needs of our staff with the needs of our client community.

And it was a real balancing act for us. I mean, we had funders who said, "Why are you not back in the hospitals? The nurses and doctors are in the hospital, you medical legal partner who we fund, why are you not back in the hospitals?" We had offices for the aging who said, "No, we don't want that free tech you're going to give us, we want you here at the office for the aging in whatever county, because we're back. Why aren't you back?" And that's really hard to balance all those considerations. And obviously keeping our staff safe. It's like the number one priority. But for us, it had to be a little bit of a hybrid in terms of getting the PPP. But saying we still need to be out there because we're required to.

But we do let people do, in addition to the COVID issues and any other exceptions, we give people two days a month remote and I'd say about 70% of people take advantage of it. Again, the newer staff, I think, want to be in the office as we closed in January for a while. Like when the peak we said anybody wants to remote work, remote work. And the majority of people came in because we have a lot of new young staff and they want that interaction. They

miss the water cooler or going to lunch or happy hours. And they want all of that.

Lillian Moy:

This notion of balancing the need/desire to be virtual as the world becomes again, more and more physical. And we acknowledge the challenges of the last two years and the things we had to do a little bit differently, but we also think that we improved services in the last two years. And Margaret, I'm going to ask you to go back to bringing the PowerPoint up and show slide 10. So Sally can talk a little bit about what happened at VLP and how they have improved services and service delivery in the last two years. So you just want to go to slide 10 Margaret, I think it's slide 10. Yes. That's you, Sally, right?

Sally Curran:

That's me. Okay. So I actually have several different items that we have done in the last few years that I'll highlight at the end of this one. So we have done many things that I think, sorry about that, many organizations have done... We implemented Teams for collaboration. We started using smart office soft phone app for virtual phone, from computer so people can use the phone from their computer or cell phone. In addition to the regular office phones, we already had an online application through LegalServer, but that's been continually improving it, tweaking it, changing. What's mandatory, what's not.

We've used Zoom particularly successfully for name change clinics, where we have like 30 different individuals come in and they get sorted out to different breakout rooms to meet with law students. And then a lawyer that's popping in and out to check in on them. And we've of course used Zoom for community trainings, which either live stream on Facebook or record and then put up on a YouTube channel and link to our website. We've also done some larger projects that I'm not sure others have done. We had already been using LegalServer and Microsoft 365 since 2014, but we launched a major rebuild based on metadata instead of folders for our SharePoint, so that you browse it more like you browse Amazon instead of an old share drive.

We integrated LegalServer case management and SharePoint document management, which was wildly successful for staff. If you haven't done it yet, I really encourage it because it just... Many of our staff struggled with when do I use case management versus SharePoint and that just brought it together. So they stopped worrying about it and they love it. And we actually integrated it. So the metadata tags pull over from LegalServer. So if you look at a case file in SharePoint, it has everything in it. The client name, it's got the primary user, it's got whether it's open or closed, things like that. And we also did a massive security analysis and updates and going to shout out Just-Tech for their help with all of these things, because we don't have an internal IT office.

I jokingly say I'm the chief IT officer in my office, but really it's just because I have the emails of Just-Tech. And for client services tools, all of those things I mentioned really at the end of the day, make it so we're better able to serve our clients through client services tools. We also used DocuSign for eviction documentation for HUD grants, especially for tenant hardship forms. We were able to submit them to court electronically, which was great. And we've been using Envoy for client and staff health screenings and just recently integrated Athena thermal temperature gauge, which has been really helpful for our immigration clinics, which is where I'm bringing us to actually on the slide.

Lillian Moy:

Which you've got on the slide.

Sally Curran:

Yeah. So that's been helpful because at our immigration clinics we're bringing in 60 plus people in one morning to screen Afghan arrivals whether or not they're eligible for asylum, special immigrant visas, things like that. So in order to help enable that we, this is just a fun, easy tool. Any of you can use. We created unique SharePoint sites for a legal team that integrated us and Hiscock Legal Aid Society so that all of the attorneys in both programs are able to access the same planner, same document, folder that's got all the resources we need.

And then we created separate SharePoint sites that have all the attorneys plus the community resources. So you can see their link to client SharePoint sites. So like Catholic charities refugee resettlement program next Friday is going to be bringing in another 30 clients. They've already uploaded all of the client folders and everything.

Lillian Moy:

Thank you. Sally, I just want to move on to Sienna because she's next. So if we could see the next side Margaret.

Sienna Fontaine:

So, I think Sally really hit so many of the things that I think were great innovations, I guess. We call them innovations for us, but that many of you all I'm sure are using. We had been communicating with clients via WhatsApp, prior to the shutdown, but obviously that's been a huge tool for us, for many of our immigrant clients who are familiar with that tool because that's how they communicate with family members all over the world. So WhatsApp has always been a really great tool for us. Similarly, doing big clinics, we had many DACA clinics and other kinds of clinics that we would use Zoom, have folks in breakout rooms, doing those kinds of screenings.

Zoom has just been a great tool; I think for so many of us and creating space and all of the fun kinds of tools that Zoom has to make our meetings fun and try to keep some of that energy that we otherwise would have in a staff meeting or in a department meeting. And so, obviously Zoom has been, I think incredible for so many of us, we do a large amount of Know Your Rights trainings. And so, a lot of those, whether it's the legal team or organizers, we do them on Facebook live. And so, it's been a great tool for us, we can see how many people are viewing them after the fact. And it's just really increased our reach. We have a structure of committees. So we have community members that pre-pandemic would come together weekly.

A lot of those meetings have been combined, but also our reach now has been broader because more folks are able to be present virtually. And so whether that's via Zoom or via Facebook, those have been critical tools for us. One important thing is that we upgraded our phone system to a web-based phone system, which we hadn't had before. And so that's been a great tool for our staff to be able to see the email with a message and have everything centralized at their computer at home. And so that's been a great tool for our team. And then here, I just wanted to highlight that, we are trying to move, obviously all of our systems, communicating with each other remotely. And so we use Salesforce for our case management system.

And in the last year, we have been able to integrate that system with the Box, which is where we keep all of our case files. And so it's just, as Sally mentioned, having our team be able to utilize these tools and make the work more seamless, accessing documents, being able to see the latest version is in Box, working collaboratively, it just improves our service delivery for clients because we're able to just be that much more effective. And so that has been, I think, just a great way that we've moved forward and improved our tech systems. And then one last thing you can see it here on the left hand side, Salesforce, we've been really utilizing dashboards to start to collect and look at data to be able to track how many cases we're doing.

We really moved with this in the last year when we were doing a, as many of you in New York were doing emergency rental assistance applications and program. And so we were trying to track where people were coming in, how many we were doing. So all the teams in our legal department, our workplace justice, immigration, have started to create their own dashboards so that we can look at intakes. We can look at what stage cases are in. And we're trying to get to a place where we're really able to assess capacity because as we're all feeling the overwhelm and the stretch of the last two years. And so we're really trying to look more deeply at our capacity, the cases that we're doing, how are they moving? And so the dashboards have been a real great tool for us that we've... It's been relatively new in the last six months, I would say.

Lillian Moy:

Thank you, Sienna. And questions can go in the chat. We're going to move to CELJ to Karen and Karen, just because you have the most slides does not mean...

Karen Nicolson:

I was away so I had nothing better to do. So I think I talked about really pretty much all of the first slide, which is really clients based services. So we can move to the second slide Margaret. Again, what I said about some of our partners and our funders really being hostile towards tech, I'm not kidding. I had free Amazon Echos to give away and was told no like eight or nine times, "We don't want those. We don't know how to use them. Our clients won't like them. We have to train people." So now we're putting them in libraries I think, and allowing the other local services programs to group in on those and not making it so senior focused. So as I said, that all of those things led us to coming back into the office.

Next slide, please, Margaret, into the office more quickly than other people I think had, but it doesn't mean we're not using tech. It's just in terms of client service delivery, we made the decision that low tech for our clients was better tech and that we should make investments, which we used our IOLA and OCA dollars to do into existing programs that we had. So one of the most successful was our helpline, which is run by Erin Riker at our office. I think she and Kristen Ora are going to be doing a presentation on this, but we just built out that, it had been something that was not utilized a whole lot. I mean, we had people calling in, we had about two hours a day we were doing once the pandemic hit, we opened it up statewide.

Our volume went up like tenfold. We were getting calls all day. So we utilized the tech that we had. And Erin's really the mover and shaker behind that, the blog, the website, all those things that I think everybody just built that out more. Another thing that we had prior, that we decided to invest, in was something called our mobile legal unit, which I like to describe it as the NYLAG justice bus, but without the bus part, we have jet packs and we have everything we need to do briefly in a day of legal services. And we travel around 10, 11 counties in Western New York. We invested in that we got more of all the equipment we needed. We trained more staff on that. It's funny to think about some of the tech that we had before and how it didn't.

And I think I texted you about this, Lilian. One of the things that we were really super proud about was this app that we designed with Pro Bono Net and the Neota logic, I think it was mentioned yesterday. And one of the programs called our Legal Risk Detector. And what we did is train non attorneys who go into people's homes on how to spot legal issues and they answer a few questions. And then we get a notification that this person who's home bound has a legal problem. And it was being used by Meals on Wheels people, social workers, the

people who were in homes all the time, and then nobody could go in anybody's home anymore.

So that app that we had really relied on and utilized a lot, we pretty much weren't able to use that lease first six months of the pandemic. So it's interesting just to see what you had changed and your service delivery methods had to change because of the pandemic. But I think we're doing what everybody's doing. We're trying to pivot; we're trying to be mobile and we're trying to balance client needs with staff needs.

Lillian Moy:

Absolutely. And Adriene, what'd you learn about how to improve service delivery in the last two years?

Adriene Holder:

I mean, a lot of the same lessons that everyone else has been sharing and I'll try to be really quick. And what we've done is not necessarily so innovative perhaps for folks who are listening or for even those that are on this panel, but they really were for us. And before I forget, let me just also say, none of the things that we've been able to do would've been possible without a really strong IT and training our training team, our IT team, as well as our communications department. And I just want to give them a shout out because we had a lot of ideas and we were always trying to move and be flexible and figure out where our clients were and what they need to do.

And during these crises, however they're defined, I can think about some really wonderful innovations with technology and volunteers that were started after Superstorm Sandy and even after the travel ban and my folks in immigration flocking to JFK, a lot of those innovations came not only by keeping the client centered and figuring out what it is that we needed to do to assist, but was because we had wonderful IT comms and even training folks who said we can help in this moment. And so consistent with that, what we really wanted to do was push out information. So on our website, of course, we had things that were related to the emergency, whether it was about COVID 19, Know Your Rights materials.

It was really important to get them pushed out, not just on our website, we have a social platform presence, but it's not as necessarily as robust as you would think it would be. So we really went to a lot of our friends and one of the places where we thought that we could get a lot of traction was with the two and four year CUNY college system here in the city. And I have a good friend who is a top leader there and they were able to connect us to make sure that, whether during the time, whether it was about the moratoria, or whether it was about ERAP, when that became online, even Safe Harbor before that we

did Know Your Rights materials, that they then pushed out to the students who then pushed out to other folks in their community.

And it was important for us to do that. And then we were able to develop and are still in the process of, we haven't finished, developing with our comms team and some of our training folks to actually tape live round tables or town halls. But also, just even yesterday, they taped, I think, three more presentations that the students and we're hoping that this will go... It'll be on a lot of other platforms, will be able to see information at their leisure at the time, in which they want to see it, not at a specialized, a reserve time. Of course, during these last two years, we would have town halls that were at a particular time, or we would do outreach or meet with tenant associations at a particular time. But if there was a segment that was about Know Your Rights, that we were making sure that we would curate it and our comms team would edit it down to be placed on these platforms.

We also developed a centralized virtual intake system for our Robin Hood Benefit Access Program, which is where we team up with a lot of schools or community based organizations. And we normally would be appearing in person even before the beginning of the pandemic. I'm sorry. I just have to say that, Lillian. We had already brought some people in to say, we are just going to have the community folks call because there is this thing happening that we're concerned about with COVID 19, but we decided to really try to build on that to say, isn't it more efficient that there doesn't have to be a specific time once a week for some period of hours, but we can actually schedule different shifts of people who are just going to be available around the clock. So if someone comes in on a Thursday, they don't necessarily have to wait till like next Friday when we're actually present to be able to get some type of screening on a promise of an appointment.

The other thing I know we have to go quickly, and again, that's not huge, but it was huge for us because of the way in which we were working, like where people were working virtually, we had to bring in the systems, thank you IT department, and really figure out what was affordable. Thank you IT department for us to be able to have people who could have these different switches, where it's like, well, I'm on today and I will be available to the community partner be to be able to take any... And then I can also transfer thank you IT department to because my big background is in housing, but I can transfer to the person whose background is in immigration to still be able to connect that person.

And then we also had expanded virtual outreach efforts and again, more client facing material to help our folks out. What our clients was at, they needed and we worked with Columbia Law School to develop these things called justice tablets, which are inexpensive portable things that we loaded with WhatsApp and just other things so that clients who really were having a hard time during the course of their litigation, not just in terms of appearing for trials or for

hearings, but even in uploading documents to share with their clients, clients who are disabled clients who had other type of impediments that would keep them from even being with their advocate. And we were able to use them in a very limited sense, because we could only afford, a lot of us funded it out of our own pocket, because my organization didn't have the funding for it.

But now I was just told last week that we finally have gotten someone to generously give us more of those that can then be checked out for the clients. But we were able to develop that with the assistance of Conrad Johnson at Columbia Law School and his Lawyering in the Digital Age Clinic. So it's just things like that. Again, not so momentous, but I mean, or so innovative for us. Let me just say it's innovative for the Legal Aid Society. I'm sure people across the state were already doing some of these things or moving in that direction, but it's something that for us really has opened it up and helped us to modernize. And one last thing, if I have a second, I will say you to-

Lillian Moy:

You do, but then we're going to want going to... Yes, you do.

Adriene Holder:

So, one other thing that we were able to do is during these times, you also want to look for like what innovations and all of us are good at this here in the New York legal services provider community, like at a time of crisis, let's also sneak in some more innovations and things that we've always been trying to do. We were able to up our game in the use of Qualtrics so that our people who are on help lines can push out information. We had a small repository of recent information based upon where people lived and their issues that they could send out on how to get repairs or how to apply for food stamps. We were able to refine that and develop more so we could push that out to people in and better real time.

And we also were able to update our case management system, which I'd like a new one and I need to talk to anyone about getting one. But in the meantime, we were able to update it with better capturing and be more affirming to folks in terms of collecting SOGI information and making sure that folks understood that even though systems and institutions and agencies may view their identity to be one way that we at the Legal Aid Society were still capturing what was their true identity and for our system to have that was huge to change it because our case management system is so bulky. So we use this as an opportunity to say, let's push the envelope and get this done as quickly as possible.

Lillian Moy:

We'd like you to share that intake part of your intake flow with others. Okay?

Adriene Holder:

Sure.

Lillian Moy:

The part, all right. So Margaret, you could take down the PowerPoint, because I'm just going to ask the panel if they would share with... We still got a lot of people in the room, man, the end of the 50 minutes, what's your leadership tip for 2022, maybe for the next two years. Margaret, you can just stop sharing your screen and we're just going to end it now. We're not going to do the last poll. So thank you Margaret, but what's your leadership tip for the next two years?

Karen Nicolson:

Are you calling on people? Well, you're not being-

Lillian Moy:

Karen, you want to volunteer first? Yeah. You come on. You belong here, come on.

Karen Nicolson:

I think the leadership tip is probably, you just have to meet people where they are right now and understand that what you're seeing out of people in these last two years might not be what they're really and truly capable of just because of the stress and the anxiety. And I've had some of these conversations with my team to just be like let's just take the good and the bad and not throw the baby out with the bath water all the time. We just have to understand that this is really hard for our staff and it's really hard for us. And sometimes you're not putting your best self out there and that's okay.

Lillian Moy:

Yes. Thanks, Karen. Sienna, you're building a building. You just recognized a union, what's your leadership tip for the next year or two?

Sienna Fontaine:

I'm like how much time you got? No. Yeah, we are experiencing lots of changes, all positive and all growth and learning. But I think just to keep it in the tech realm, sourcing ideas from all ranks of your staff, I think as leaders at the top potentially of the hierarchy of the chain, especially when you've been practicing, as long as some of us have been practicing, you have your systems that work for you and you think it works for everybody else. And so I think really, talking to the young paralegal, who's like, I've been doing this other thing. WhatsApp was definitely like, I didn't have WhatsApp to start.

That's how the staff were communicating with clients as the organizers were communicating with clients, so really sourcing those ideas from all ranks of your staff is so important to stay fresh, see how people are innovating, see how people are approaching the work differently because often the best ideas are going to come from somewhere else and your staff.

Lillian Moy:

It could be in the next five years. Adriene, what's your leadership tip for the next year or two or five?

Adriene Holder:

Again, I'm like seeing you in 15 minutes, but I'll just say, keep clients centered. I'm always saying like, what is it that our clients need? What is it that we can do to help our clients? And what I found is that when we've kept the client centered and for everything, whether it's around the technology or how we need to be moving in terms of program when we keep the clients centered, everything else falls into place. When we keep the clients centered and say, what is it the clients need to be able to actively engage and really have due process? What we've found is that the answers to that actually help our staff. It actually helps other stakeholders that are depending on us to be able to support that client. So it's just keep the client centered and then the answers will come to you.

Lillian Moy:

You promise. Okay then. Sally, you want to close this down? Your leadership tip for the next year or two of five?

Sally Curran:

Sure. First I echo everything the first three said and the only thing I would add to that is really be flexible and recognize that, especially in the tech realm, there's no destination. It's always a journey because there's no tech that you will implement and be like, well now we've arrived. Because as soon as you implement it, you're having to change it and rework it. So try to be as flexible as possible and open to the idea that whatever you thought was the greatest idea ever will need to be changed and tweaked.

Lillian Moy:

My friends. Joanne, you want to pull in there or anything? No. Anything you want to-

Joanne Sirotkin:

No. But I think I want to thank our presenters since they've given us great tips.

Lillian Moy:

Absolutely the best. And if you want to chat us a leadership tip for the next couple of years, maybe we'll stay open for 30 seconds or you can email or remember email. You can email any of us. I have a great Text Chain going on. Chris, thank you. Thank you for joining. And I know Chris and Christine will remember everything they heard here from you about the next couple of years. And so will I. So thank you everybody namaste, have a great day. And sorry, Joanne. We ended almost on time, right?

Joanne Sirotkin:

You doing a great job keeping us on time, Lillian.

Lillian Moy:

Thanks to everybody-

Joanne:

Thanks, everyone.

Lillian Moy:

Talk you soon. See you soon. Bye-bye. Thanks, Tyler and Margaret. Bye-bye.

Margaret:

Thanks, Lillian.

Joanne Sirotkin:

Thanks you Margaret and Tyler.

Tyler Lehr:

Thanks. Have a good day.