Erica Ludwick:

All right. Good afternoon, everyone, and welcome to Operationalizing Change Management Through Staff Management Technology Committees. My name is Erica Ludwick. I'm a Deputy Director at the Legal Aid Society of Northeastern New York. I'm going to pass it off to my colleagues, Mike and Alex to introduce themselves.

Michael J. Telfer:

I can go first. So my name's Michael J. Telfer. I'm a Senior Attorney with LASNNY's Albany office. I represent clients in social security disability cases before Social Security and the Federal Courts. I am also the former chairperson of our staff union, and I'm here today as the Co-chair of our Technology Committee in the office, or our tech committee, for short.

Alexander Horwitz:

Cool. I'm Alexander Horwitz. Pleasure to be with y'all today. I'm the COO of LSNYC, Legal Services of New York City, and one of the departments that is under the umbrella of operations is of course IT, and I also chair a number of the ad hoc committees that we use for tech change.

Erica Ludwick:

Great. And thank you both. As a little bit of housekeeping this afternoon, I just want to let everyone know this program will qualify for CLE credit. The online forms are available on the conference website, and we'll be providing a code during the presentation.

By way of overview, we hope to have a fruitful discussion this afternoon about the comparison of different types of technology committees, including committee makeup, how committees operate, and some examples of successful initiatives that are resulting from the different technology committees. We'll also talk a little bit about creating your own technology committee, including ideas on how to create similar committees, and the pros and cons of the different structures and formation.

During the program, we will monitor the chat, but it is just the three of us, and so we'll do our best to answer the questions within the context of the session. So, we're going to go ahead and get started with our first poll this afternoon. If you could please launch the poll.

The question for folks is do you currently have a technology committee? And I'm going to give it just a moment to let some results come in. So, right now, we're sitting at about 57% to 60%, no, and about 45%, yes. Looks like it's coming closer to half and half. And so, with that information, we hope that the discussion that we're going to have today will help you discuss and decide amongst yourselves back in your organizations, what type of a technology committee structure might work for you, and hopefully inspire the creation of technology committees at organizations that do not currently have a technology committee. And so, we'll jump into things. Mike, can you tell us a little bit about the technology committee structure at LASNNY, including the who, what, when, where, and how?

Michael J. Telfer:

Sure. So, our tech committee, it's led by a managing attorney and myself. We're co-led by a management member and a staff member. So, the goal has been to represent all positions. Currently, as you can see, it's our Executive Director or CIO, a Deputy Director, who is Erica. Three managing attorneys which includes the co-head, the senior attorney, which is myself, and a paralegal.

The staff members were not placed by the union. We don't represent the union and we're not union officers. LASNNY's also a unionized workplace, I should mention that. We have six offices. Every office is represented by someone there. Either they work in that office or they supervise the office. So, the goal has been to represent the members from that office, the employees.

So, we meet as a standing committee. We have a recurring calendar every month for meetings. How it works is the other co-leader and myself, we plan the agenda every meeting with input from each other, from members of the committee, and from talking to other management and staff members in the office. We've had virtual meetings, honestly, I think the whole time we've actually been a committee because we've had people from different offices.

And then we have the meeting's work, we discuss agenda items. Everyone has an equal voice, people can voice opposition, support for ideas. And we have planning for next action steps if items are not resolved. Those item steps can be discussing further with our executive management team. We call it our EMT, which is our upper level management team, with our CIO or tech support. Our CIO is part of the committee. The committee members are assigned work on specific issues. We will survey employees for opinions, either informally just in the hallway, or formally through a SurveyMonkey. And then we plan just the next meeting as well.

And how this all came about, how our current committee exists, little history lesson for everybody. We had a prior committee, technology committee, before my time. I've been with LASNNY since 2013. The committee existed before that. We did a training at the Shriver Center in the mid-2010s. And then from that, a couple of initiatives came from it, including one which was knowledge management, we called it. The goal was to preserve institutional knowledge in the organization and share it with employees throughout the organization and for the future.

And the one of our projects from that was modernizing our SharePoint for a legal library or a brief bank. And then, our knowledge management committee was working on that issue, among other issues. And our old technology committee was working on various other issues as well. And at some point, to the knowledge management initiative, we just merged together the committees. And now, our old tech committee, the knowledge management committee exists as our current tech committee. And that's how our we came about today.

Erica Ludwick:

Great. Thanks, Mike. That's really helpful. Alex, I'm going to pose the same question to you. Can you tell us a little bit about the technology committee structure at LSNYC, including again, who, where, why, and how?

Alexander Horwitz:

Well, I will do my best to hit all of those, Erica. Thank you. Yeah, we have a very different approach to solving similar problems or similar challenges. So, as opposed to a standing committee, our organization uses ad hoc committees. So, we assemble committees and committee structures around specific challenges or specific projects. And then those committees really manage and own that project from the concept phase, all the way through execution and evangelizing the change to the rest of the organization.

And one of the reasons that we found that this setup works best for us, is down to some core features of the organization and its profile. And what I mean by that, is one of the distinguishing features of LSNYC is its scale. We're very large, we have a headcount of about 700 people. And so, when you put together committees and you want to be as inclusive as possible when it comes to stakeholders, and you might be working on a broad spectrum of tech challenges or tech improvements, in order to truly be inclusive, in order to really get a lot of stakeholder input and ensure that all those voices are heard and that those workflows are taken into account, you need to have a really diverse and deep bench to work with.

And so again, given the scale, if you have a committee of just seven people, let's say, you're really only capturing 1% of the organization. So, by doing multiple ad hoc committees, we can ensure that there's a lot more equity in the process and that we get all the viewpoints that we need.

We base a lot of our workflows, we try to root a lot of our workflows, in our commitment to DEIB as well, to diversity, equity, inclusion and belonging. And that's another reason why we find that the ad hoc structure really works for us because it is necessarily so inclusive. And again, you get more diverse viewpoints, both in terms of the areas in which people work in the organization, unit-wise, practice area-wise, department-wise, but also just demographically. And that is so key to, again, building a stronger organization and building solutions that will last for a workforce that is always evolving and always changing at that scale, that it is.

Another interesting aspect of our committees is that often the composition changes over time. So, we may find, especially for longer term projects, that we start with, let's say, a heavier balance of legal work supervisors, or a heavier balance of IT pros as part of the committee. And then as we get further along in the development phase and move towards execution, we start to move other people into the committee. Some people might exit as their roles sunset, and we try to make the committees really, really flexible in that way.

I think that another really important feature that we've talked about in some of the prep sessions for this session, is that it is hard to ignore that almost any process change that you want to make in a law firm, and especially a public interest firm like ours, or the collective ours, there is a tech component. Technology is this is the backbone of all of our work across all of our units. So, even if at first it doesn't sound like a technology project, you pretty quickly realize that you're going to need that input and you're going to need those tools in order to carry through almost any operational or workflow change. And that was another reason why we wanted the flexibility of ad hoc committees that we could quickly pull together and engage on a project to see it through.

And so, the way that we use these committees, and thanks for putting up this slide, Erica, is we really use them in, we think of them in sort of three different categories. We're developing new solutions altogether when there's a gap or an opportunity that we want to address. Then there are cases where we have off-the-shelf tech products that we need to integrate into our system. And sometimes those are disruptive, even if they may serve the organization's interest or eventually serve even the daily practice of our attorneys. We need people to be ambassadors of that technology. And that's how we use a committee to advocate for change. And then finally, there are cases where we have solutions bubbling up in various departments that we want to roll out organization-wide, and that's another reason to put together one of these committees.

So, a little more detail if we have time. Is that cool, Erica? Great. So, when we think about developing solutions from scratch, we tend to use a method from Grant Thornton who's been an amazing partner to our organization in coaching us and teaching us about large scale organizational change management. And we use their method in guiding the committee's work. So, that involves appointing a project lead and a change lead, tackling the two different aspects of the project, the cultural side of change and the technical side of the project. And we try to ensure that we're getting, again, as many stakeholders and to encourage and foster cross-department collaboration, which is really difficult on a good day. But these committees provide a nexus point where finance can talk to grants and contracts, which can talk to legal workers, and talking to IT in ways that they don't traditionally do because they're so busy and so focused and dedicated to their own work. So, that's another benefit of these committees in assembling them. But we use a very deliberate method again, that Grant Thornton Change Method with these two project leads. And I should mention that the two project leads are not necessarily senior members of the organization. We try to choose the best person for the job based on their engagement, the amount of their level of being a stakeholder and their skill sets. And they really guide the project through its various phases.

And then when we talk about advocating for change, as I mentioned, we know that there are some really big funders out there that prefer buy over build. And listen, that's great when it comes to the longevity of a product and ensuring ongoing security and updates and stuff. But it often is a big hill to climb, to get people to engage with an entirely new system, to engage with a new workflow, especially when folks are so overwhelmed by the amount of legal work that they have to do.

That's when we really need these committees to be vocal advocates for this change to go out and perform trainings. And we usually ask folks who are subject matter experts in the area that is affected to deliver the trainings as opposed to relying strictly on IT trainers for this kind of stuff. Because that peer-to-peer training is so important. And that's how these committees can be used as tech ambassadors for changes that are necessary, but maybe difficult. Could you flip to the next slide please?

And then this is a really interesting case and I'm so curious to hear, hopefully in the chat some folks might talk about this, again with our scale, and it's ... Nobody wants silos in an organization, but they happen because we all do different things. And what's really amazing though, is when you see an individual vertical or a unit in an organization develop or implement a change because it was really needed and necessity becomes the mother of invention. Wow, actually that tool, we would really like to see that rolled out across the organization. How do we do that? That's another opportunity to engage an ad hoc committee who can find those tools that have bubbled up in these individual units and then start the process of adapting them from a technical standpoint and rolling them out culturally so that the entire organization benefits from some of the innovations that are taking place in what are traditionally siloed units. And so, that's another great use of ad hoc committees that we've taken advantage of.

Erica Ludwick:

Thanks so much, Alexander. Having heard a little bit about each of the different models that LSNYC and LASNNY are using for their technology committees, I'm going to go to you again, Mike. Could you tell us some of the projects that LASNNY'S technology committee has tackled and particularly why or how you think the LASNNY model helped or advance those projects?

Michael J. Telfer:

Sure. So, talk about three projects I'm pretty proud of. The first one . . . we documented a few in the PowerPoint, so definitely take a look at all these. Microsoft teams, I love it. I went to the LSC conference in 2020 in Portland, and I don't work for Microsoft, but I really encourage people to use it. It's changed my practice completely. So, what happened is I went to the conference literally when I got back, I tested it out at home and I tested out at our unit and we pretty much ... it changed how we do stuff in the disability unit. I presented to the staff and we started rolling it out before we went remote during COVID and we were prepared to use it as a unit remotely. And that really helped us.

So, how we use it now, we use it to assign our law clerks and our paralegals, and other units do it too, tasks and projects to do. I do it for myself. I'll set a reminder to do something in Teams. We use it for quick chats instead of just back and forth emails, which can go on for days. Where I've done recently, which has also helped our new staff, we have a couple of new hires in our disability unit. I set up a chat for the new staff to give advice and for them to ask questions to the more senior staff. It evolved the last couple of weeks to just me including the whole unit now. And it's just brought us together more just with the new staff. And then it also allows me to, or any of us, to give advice at once, so everyone gets the same advice and it's really just helped our ... I think the new staff, they really enjoy it.

And then we also use Teams to organize our tech committee and other groups such as law clerk hiring, which we just are working on finishing. And then we use it for video meetings internally, externally. Sharing documents quickly without emails back and forth with editing. And we've also used it to draft documents on a shared location. Especially during early days of COVID, we would do trainings for the public and we would just draft our trainings through Teams.

We've also done tech talks, which began during early days of COVID, to train employees on software working remotely. And then these evolve, we do these now every two months. They're live trainings that are recorded. The recent ones we've done, we've done our PDF editing software, which is Nuance, LegalServer, including texting. I feel like I've done the texting one at least three times since 2020. We've done on Microsoft Word, efficiency tips such as a sticky notes app we have in Windows, date calculator website, a snipping tool for cutting and pasting screenshots on Microsoft Outlook.

People have really liked these. They ask questions. They're wildly attended, they share tips. I've learned things. Just some people, just employees, just noting stuff they're doing. It's really been, I think, a game changer in the office too.

These are recorded, we share them in SharePoint, so new staff and interns are asked to watch them. And we put together our own version of the rapid fire tech talks, learning from this conference, the LSC conference, because those are always great, on the various tools and tips. We put together a bunch of funny animal photos, so people enjoyed that part. But we think the substance was also enjoyed too. And then, it's giving enough people opportunities in the committee to get experience training people and for people to ask questions live.

So, I think it has helped the organization as well. And the final one I'll note, which you've also explained in here, is we've created a staff directory. And this is a years' long idea from a long time current member of the committee, who is now a managing attorney. Depending whether you went to law school, at Albany Law, we have like a paper Facebook. And his version was to do that several years ago with taking pictures of people and putting them on a Word doc. But now we've done it in SharePoint and we call it a staff directory. It includes all employees, staff and management.

How we've done it, we talked about this on the committee, what details to have. And we came across an agreement -- use it to find notaries, we have a box, people check they’re notaries or not. We can determine who practices what law in different offices. For example, you see the example we have in the PowerPoint. I list the counties I serve and my grant. You can obtain someone's phone number or extension quickly. Who has experience in areas not in current roles. I noted in just my short bio, my background's criminal law, long-term disability, which I don't practice currently. And then we have pictures, which are voluntary. I do have to add my picture at some point. We also have people's pets. Those are also fun too.

And then just your last question with this, I think the model has helped us because we built on our past work to do all these things. The staff directory was based on our work on SharePoint. The tech talks were based on us being most familiar with how to do things. And then with Teams, that was a result of me representing the tech committee to go to the conference and having that ability, that pipeline to the CIO and to the tech committee, to just test this out internally.

And our ideas with all these, they came from multiple people within the committee, sharing tips and long-term goals. And I think we've always been able to rely on each other for the tech talks, so it's not just one person teaching these. And our relationship on the committee, also I think has led to a lot of our success with all these projects. We've allowed the free sharing of ideas and opinions, good or bad. And it's enabled us, I think, to work through projects effectively.

Erica Ludwick:

Thanks, Mike. I'm going to turn now to you, Alex, and really same question. So, tell us about some of the projects LSNYC has tackled using their ad hoc committees and how or why you think the LSNYC model helped or advance those projects?

Alexander Horwitz:

Sure. Well, I have a small and a large to talk about, and they represent I think, two really different approaches to these types of projects. So, I hope it's illuminating. On the small side, in terms of a solution that addressed a really specific problem, or took advantage I should say, of an incredible opportunity, that some staff members in our grants and contracts department created, is around onsite intake for clients.

Intake is a really brisk process at LSNYC. We have an access line, where we have a whole phone bank of people full-time who just do legal intake and provide some forms of advice. And it's tens of thousands of people a year calling in. But we also do intake onsite, in court. But there was a problem, which was that the onsite intake was a slow process and a paper-based process, and that meant that there was a significant lag when it came to entering that client information and getting all of their relevant consents and acknowledgements uploaded and integrated into our client management system, of course, LegalServer.

And for a while, really all on their own, a group of super tech-savvy folks in our grants and contracts department had been experimenting with creating little JavaScript projects and really fun little coding projects, to build integrations between grants and contracts and LegalServer, and our financial system. And it was just sort of our own little mini DARPA basically of folks who were taking this on, all on their own. And they had a breakthrough with an off-the-shelf forms product that they realized that they could tweak using the coding that they had learned to link up mobile devices with our intake system. And they got really excited about this. We all got really excited about it because we realized, "Oh, there's a huge opportunity to apply this project that really had been just done for fun and convenience, and apply it for the benefit of our clients." And so, this was a great eureka moment.

And so, we formed a little group of stakeholders that included, of course, a lot of intake folks from the access line, as well as the progenitors of the project, people who had actually done the coding on their own. Then we brought in some bigger guns from IT, our app developers, and of course some managing attorneys to figure out is it possible to really leverage this, again, to the benefit of our clients and to the benefit of our attorneys onsite, in court.

And once we realized that it was and that we could arm ourselves with tablets that were sufficiently secure and digitize our intake forms, then we started to beta test it in the field. And we didn't use live clients, live client info at first. We just experimented with dummy forms and made a little sandbox for ourselves to play with the information moving back and forth. And yeah, there were bugs and there were hitches, but it was eventually really successful.

And the rollout was really fascinating because there were of course, a lot of folks who were going to court and wanted to perform intake faster and wanted to make this thing more efficient. And were just really excited to embrace this technology. And then of course, always there's a group who are rightfully skeptical of these types of technologies and see them as interruptions to their workflow and have questions about the persistence of information and its accurate conveyance and security.

And that's when we really needed the group of beta testers and folks that had worked on rolling this out to be those advocates for the change and to do a bit of training, a bit of handholding, and convincing that this is going to make an attorney's work easier and a client's life better. And once we were able to make that case, the adoption was actually pretty swift and it's a solution that we're still tweaking and still improving and looking to expand now.

Erica Ludwick:

And Alexander, if you don't mind, I have a quick question from our audience? And the question is, what was the issue with the native LegalServer, mobile app or website for the intake tool? If you could answer that briefly?

Alexander Horwitz:

What was the issue?

Erica Ludwick:

Yes.

Alexander Horwitz:

Well, we weren't directly using LegalServer's interface for this. We actually built custom forms that then, I believe, talked to LegalServer through an API.

Erica Ludwick:

Thank you so much.

Alexander Horwitz:

Yeah, why did we need to build a custom form? We collect more information I think, in our access line intake process. And it was also, we have a combination of paper forms that people need to fill out, a couple of different attestations that are required by different funders we have, depending on the type of case. So, it is not just a straight LegalServer page, it's a whole collection of paperwork that is part of the intake process.

Erica Ludwick:

Thank you so much for ... and then I think you had another project that you were going to talk about?

Alexander Horwitz:

Yeah, something a little larger scale. So, that that's an example of something that addressed a really specific opportunity and a specific problem. And then we're right now embarking on a really large scale knowledge management initiative, that is very, very exciting. And this is an example of when something bubbles up from a silo and you realize, "Oh my goodness, this is something the whole organization should be involved in, that we really need."

So, what we had observed that was that several departments, several legal units had been developing ad hoc brief banks, memo banks, research banks, and some amazing work that folks in housing have done in connecting different organizations with wikis of information that they were building. We saw this in our pro bono practice, we saw this in housing, we saw this in immigration. We realized the organization should be leading this and should be investing in a large scale solution that makes knowledge management a real thing, and that it isn't dependent on unit directors putting together webpages on their own.

So much good work had been done on this. It was so impressive what had been achieved by folks. Some folks using Google Forms, some people were using SharePoint, some people were just using the server and getting really creative about the architecture of the information. But we had a feeling that we could learn a lot from our private sector folks on this, our pro bono partners. And once we started talking to them about what we were interested around knowledge management, our biggest concern was have we achieved the kind of size to start taking advantage of the tools that are out there in KM in the private sector? So, we talked to a bunch of our pro bono partners, a bunch of tech consultants about this.

And when we started describing the organization and our headcount and the way it all works, they said, "Absolutely, you're big enough, and this would be an exciting thing to do to introduce some of these tools into nonprofit law." And that's when we realized, okay, we're going to take all these folks who have been independently working on knowledge management specifically for the practice, let's get everybody into the same room, form a committee around this, and really envision what large scale knowledge management looks like for an organization like ours, in the hopes that over the next couple of years, as we implement these solutions, and we're talking about everything here from document management, to intelligent search to automation, that we could help promulgate some of these tools across the entire legal services community. And probably, we need an organization that's large enough to capture the sort of attention, and work down the pricing for nonprofit purposes of these tools and then introduce those tools to the rest of the community. And we're really, really excited about this.

So, the committee has been formed and working on this really, really hard to envision how this would work in an LSC funded context and a legal services context. And we're doing some really big fundraising about it and it's gone really well. So, we envision this to be at least a two to three year project, but it's all going to be based around this ad hoc committee that was formed that will shepherd this from, again, we built a brief bank using Google Forms, all the way to what we hope is a fully integrated KM department that will really preserve 60 years of work and set us up really well for the future as well.

Erica Ludwick:

I think that's some really exciting work. And as you stated earlier, Alexander, the technology committees are really becoming increasingly important in today's legal services offices. And I think you were right when you mentioned that nearly every workflow change that you could imagine really involved technology.

And so, thinking about what we've discussed regarding structure so far and some of the projects that you've worked on, I'm going to pose this question to both of you. Can you take a moment to talk about the pros and the cons of each of the structures selected by your programs?

Michael J. Telfer:

Sure, I can go first. So, I think some of the pros for us, we're a standing committee, so it's been the same people last couple of years. We're familiar with each other, we know the work we can and cannot do. And we're a recognized part of the organization, so people know, the staff knows, the management team, our tech people, they know if we're asking for something, it's from the committee itself.

Some of the cons, as I noted in the pros and cons that are down in the slides, more of these. Right now, at LASNNY, we're going through a generational shift, which I'm assuming a lot of places are as well. So, as our long-term members of the committee and staff are being promoted to management, it's becoming harder to balance equal staff management makeup.

And we've had some preliminary discussions just how to return to that balance, taking some ideas the three of us have discussed in planning this too, bringing it back to the committee. And then we always, if someone leaves the committee or the organization for some reason, we can't always replace people by title and geographic location, due to work commitments, grant requirements. We don't have secretaries, we don't have staff attorneys since it's just the senior attorneys right now. So, that's an issue as well.

Resources may be thin due to the number of people on the committees. So, it's a balancing of priorities for projects and that's always the most ... that's why we do bigger projects and then it's the focus turns on those projects, like the ones we've noted in the slides.

Erica Ludwick:

Alexander, you have thoughts about the ad hoc committees?

Alexander Horwitz:

Oh, I do. A lot of pros and certainly some cons too to be aware of, as everybody considers how to structure these committees. A lot of the pros, we've talked about when an ad hoc committee is created and they have a reason for being, they are intensely focused. The work is efficient, it's singular. It's singular in purpose. So, as long as you provide a project structure in terms of project management and everyone's on that page and you establish the appropriate cadence for meetings, this is a group of people who are deeply committed to the solution, and that keeps agendas very lean. And often, we found accelerates a project's development and progress. Because projects also hopefully have a start and end date, it can also help reduce fatigue and make more room for the work of serving clients, but for people who also want to have a say in these types of changes, which is great.

Being super flexible about the composition of committees means you can ensure that you have credible messengers, delivering trainings, delivering transparent updates to their teams, to their units, to the rest of the organization, about why we're embarking on a particular tech change. And that's really helpful.

Likewise, technical expertise and subject matter expertise comes in a lot of different flavors and you need a lot of those different inputs when you're talking about altering people's workflows. And you want to be really conscientious and respectful of that. And having the ability to constantly create new compositions of committees ensures that you've got all those different subject matter experts involved.

And there are some secondary and tertiary benefits as well. I mentioned cross-department collaboration and again, breaking away from the big wall that is traditionally, at least that we've seen, is traditionally between legal workers and administrative, operational, governance, administrative staff. That's a really hard separation in a lot of situations, and on the day-to-day. And by working together on these integrated committees, we can break down some of those barriers and that helps the health of the organization overall.

Likewise, another secondary benefit besides getting the project done is that it is these committees are venues for learning and for teaching and for professional development. So, it's wonderful to be able to involve new staff in them and certainly staff with shorter work histories in them. Because it's a wonderful venue to learn about management, project management, change management, so on and so forth. So, you're really sharpening the skills of the organization by using these committees in this way. And that has long-term benefits, culturally and organizationally. So, that's the good.

Now, the bad. On the con side, there are a few of those too. Certain folks will wind up in a lot of committees, or wind up on a lot of committees in rapid succession. And if you think there's fatigue for a standing committee, wait till you put somebody on four of these at the same time. Their schedule is destroyed, they're brain dead by the end of the week, it's not a good thing. So, you have to be very mindful that you don't become over-reliant on any single staff members when you're working with ad hoc committee members.

Scheduling can be very difficult. You need a lot of admin support. You need people to be flexible with their time so that you can make room for new ad hoc committees as they spring into existence. And that can be really, really challenging between court and all the other responsibilities we have around timekeeping and everything else, everyone's time is so pressed.

The benefit we talked about, about educating people about this process and bringing your staff along for the ride, that can sometimes slow things down if there's a really steep learning curve. But at the same time, it is probably an investment that you want to make.

A lot of times when you're dealing with technology changes, some of it can be quite sensitive. The information that you're working on can be sensitive. And if containment is a problem, that can be worsened when you're constantly changing the groups and the players in terms of confidentiality and maintaining confidentiality.

And then, when you're bringing new and diverse groups together, consensus is more difficult. And you have to be super committed to the process of hearing out dissent, developing solutions to address those concerns and incorporating it into the long-term vision for the project. That can feel very sluggish. It can feel very frustrating on both sides, of the people who are eager to make a change happen, and the folks who have legitimate concerns who are saying, "Wait, you're moving too fast." Finding that balance is very, very challenging. But there's a lot of treasure in consensus on these projects. And so, I found that it is definitely worth the work.

Erica Ludwick:

Thanks again. And real quick, Alexander, just especially with respect to ad hoc solutions that you've been talking about, we have a question from our audience, whether there are any best practices that you might find worth passing on to some smaller organizations that emerged during your processes?

Alexander Horwitz:

I mean, being flexible on the composition was a real light bulb thing. Realizing that these committees are not life rafts, you can get in and out of them and you don't wind up in the ocean. So, there's a tendency to sort of think that way when you form a committee. Like, "Okay, this is the committee and they're going to see it from beginning to end." You do want constancy, you want your project leads to be the same. You want the people chairing the committee, hopefully to be able to do it continuously through the project. But we found a lot of value in being flexible about the composition and that the composition should change with the staging of a project.

Oh, I'm sorry, whoops. There's not the committee composition, but Google Forms, brief banks, solutions that you’re two large for might still be useful in smaller context. Oh yeah, absolutely. I mean, that's the hope with some of these, especially the knowledge management project, is that if we can take a really big bite of that apple, that we can reframe those solutions and make them more widely available to smaller organizations, to organizations who will benefit but who aren't at the scale. And so, we see our role in this is part of this community, it's going to have big benefits for our organization. But if we can work with these vendors for the first time, with these software companies for the first time, with the consultants for the first time and say, "This is a whole sector that you guys have ignored and you need to develop solutions that are right-sized for us," that is absolutely part of our ambition here.

Erica Ludwick:

Thank you so much. So, I'm going to move on just a little bit in this conversation. Thinking back about some of the work that you've done and then assessing the work that you've done in your particular technology committee structures, can you each take a moment to talk about two or three things that you would consider to be key benchmarks of success regarding your individual technology committee? Alexander, I'm going to give you a little bit of a break and I'm going to direct it back to Mike.

Michael J. Telfer:

Sure. So, I think, a couple of things on my end. Buy-in from employees, whether it's staff or management, I think is key. We've noted a couple of these in the slides, just soliciting ideas, beta testing different people in the organization. People who are just more ... not familiar with tech, those are probably your best people.

And the beta testers can become the best advertisement for rolling out a new software project because they'll get the demo version and they'll be excited if it's something cool and they'll advertise it to other people. I mean, that's always the goal.

And one big thing we've done always is, if it's ... the secretaries will help us out, they help us out. The SharePoint transition, we acknowledge their contributions. They were not part of the committee, but we acknowledge their help. And then acknowledging the committee's help too on things. And then what I've known before, is making sure everyone's voice is heard on the committee to give input. I feel like we're all equals on the committee. Erica is the Deputy Director; it's just we all have the same voice on there.

And then another big thing is training of employees and being available for retraining. This is something I've heard at multiple conferences. We tested ideas, we've brought in solutions to the organization, we've been trainers and the contact for people, so people know to go to us. It's helped with our success in the organization. And we're, I think, seen as a reliable part of the organization because we have brought in ideas and solutions.

And the last thing I'll note is we also act as what's best for the organization and the employees. We don't act as a union versus management committee. It's a collaboration that allows for non-positional leadership. It's non-positional for me, I'm officially the co-head, but even for the other members of the committee, because they're not the co-head, but they do contribute. And then it allows for input from different parts of the organization, different offices who may not ... they're not in the headquarters, the regional offices. So, they give their input of what's going on in their offices, what people are saying in those offices. So, it allows input to come from all levels and different positions.

And I'll note just in closing with this point, I've never felt our committee's actions or a mandate coming from the top instead of collaboration. I'm on the committee and when we do something, it's usually, it's the committee's agreement to do something. We may not get unanimous consent for something, but it's some kind of agreement we have to do something going forward.

Erica Ludwick:

And then back to you, Alexander, what do you see as keys to success of one of the ad hoc committees that you've worked on?

Alexander Horwitz:

Building off of what Mike said about the agreement, the stage setting for these committees is really important, and that early leadership of framing up the goal. And what I mean by that is it is natural, especially for ... I am not an attorney, but I've worked with attorneys for a very long time. And so, this is a good quality of attorneys, but they are adversarial, of course, by nature, that's how they're trained, makes them great advocates. But you can find yourself in a debate on a tech committee about whether a project should take place as opposed to how a project is going to take place.

And it is very important to move people to the how place. That is where the collaboration takes place. That is where the fruits of the labor are. That's the gold. And if you spend so much time debating about whether, "Oh, is it really needed? We're getting by fine." Or "Oh, I think this is going to make things more complicated rather than less." Well, those are all really valid concerns, but those can all be part of the how, if there's an organizational need that's unmet.

So, I think framing that from the very beginning, especially in these legal work environments, is super important. It sets everybody off on the right foot to say, "Okay, we're here to solve this." Not to debate whether it should be solved. It is being solved. The question is how do we address all of these concerns in the solution so that we're not just fixing a problem, but we're improving people's working lives, we're improving our ability to serve clients, and we're making the organization more secure and more sustainable. And those are just some of the questions that we frame up right from the beginning of one of these projects. But it's very easy to slip into that, "Oh, do we really need to?" And so, we try to get people to the “how” as quickly as possible as opposed to the “if”.

And another really important part of why this has been successful, and this echoes something that Mike said too, is a tech committee really has to be, in my opinion, built majority of non-tech people. That's what a tech committee is really great at. If you've got a whizzbang IT consultant or a great IT department, they can roll out solutions all day long. They don't want to talk to anybody, they don't have to talk to anybody. But in order for a solution to stick and to be integrated and to be sustainable, you need all of that buy-in, and you need your messengers to be the folks who will be using the technology and will be impacted by the technology.

And the last thing I'd say about a key to success is to focus on the mission. Technology can be pretty seductive when it comes to new tools. And it's really important to focus on the workflow and ensuring that the technologies that you're adopting aren't just newfangled, aren't just shiny, aren't just impressive, but serve the organization's mission. Because that way, even if it requires a learning curve, even if it may at first be seen as disruptive to an established workflow, if it's in service of the mission, you can bring people along for the ride.

And so, focusing there has been enormously helpful for us because I'm sure, just like at everybody's organizations who's in this room right now, people come to work here for the mission. So, if we can make that case convincingly, and if we're rooted in mission work, folks are a lot more flexible than they would be otherwise.

Erica Ludwick:

Thanks. And so, with that right now, I want to roll into our final poll. And so, for those of you who've been patient with us this afternoon and heard us go back and forth over the pros and cons of the different forms of technology committees, if you did not have a technology committee before coming to this presentation, are you planning on creating one now or discussing creating one?

So, I think looks like very positive results here, given some of the discussion. About 86% of folks who did not have technology committees before are considering creating them. Alexander, Mike, are there any parting thoughts that you can provide folks with respect to the structures you chose or what you hope to see folks get out of your contributions today?

Michael J. Telfer:

Sure, I can go first. I think what we've discussed in planning this is, is everyone's choice, either ad hoc or standing, is going to be based in your organization, your size, what you're planning to do, just your technology you have at the office. I do think it's something to consider from a staff member's perspective and also from the management perspective.

We've definitely, as you can see on both sides, we've come across with projects from our committee work. It has changed the practice, definitely for myself and many other advocates in the office. The work from the tech committee has definitely affected our clients because we're definitely more productive with using different software and everything else. So, I definitely think it's worth it to consider looking into one.

Erica Ludwick:

Alexander?

Alexander Horwitz:

Yeah, I'm with Mike. We talked about this a little bit when we were meeting about this session, that this isn't really ... this wasn't exactly a smack down, for those who were hoping to come to a grudge match between the standing versus the ad hoc committees. I think what we have here are two very different models for different styles of organization, different scales and different approaches. And both are very functional and I think the choice comes down to the pros and the cons and what's going to serve, again, the people that you work with, the resources at your disposal, the scale of the work, the best. And I think the most important thing is to bring the people together and to get tech out of just IT and to invite more people to participate in the decision making, in the trainings, and the process, and the change.

Erica Ludwick:

Well, I want to take the time to thank you both so much for both of your contributions today. And also, to let folks know if you have questions after this presentation, I've placed all of our contact information on the screen and you should feel free to reach out and contact any one of us. We'll be more than glad to assist you with your questions,

Michael J. Telfer:

Thanks.

Alexander Horwitz:

Well, thank you, Erica. You were a wonderful moderator and guide for all of us, so we really appreciate it.

Michael J. Telfer:

Thanks.

Erica Ludwick:

Thanks.