

OPERATIONALIZING "CHANGE MANAGEMENT" THROUGH STAFF-MANAGEMENT TECHNOLOGY COMMITTEES

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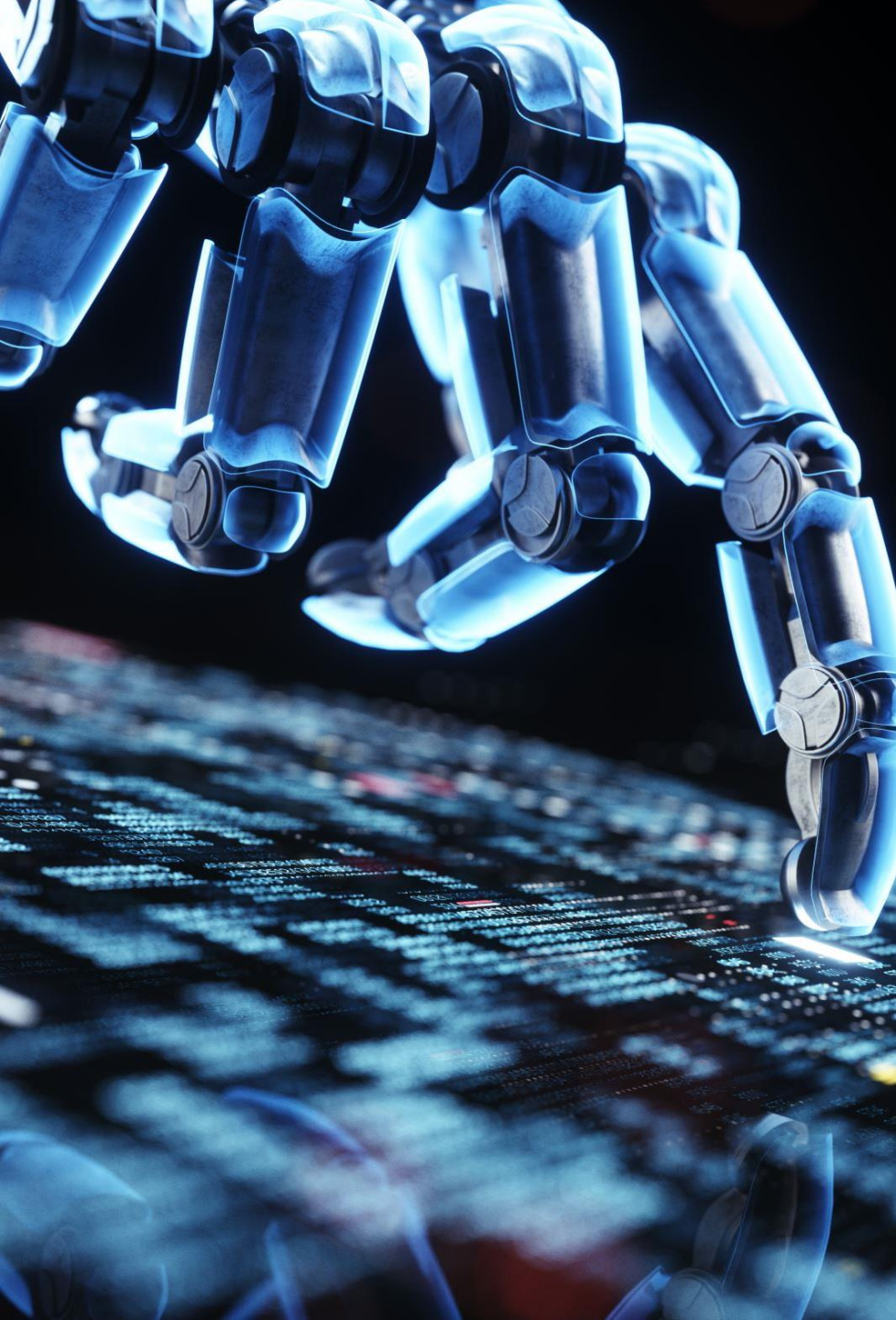
Alexander Horwitz, Chief Operating Officer, Legal Services NYC (LSNYC)

Moderated by

Erica Ludwick, Deputy Director, LASNNY

Q & A

HI! FEEL FREE TO ASK QUESTIONS AND WE WILL DO OUR BEST TO ANSWER THEM
IN THE SESSION!



Do you currently have
a technology
committee?

1st POLL

LASNNY TECH COMMITTEE



Legal Aid
Society

NORTHEASTERN NEW YORK

WHO IS ON THE LASNNY TECH COMMITTEE?



- Managers and staff co-led by one staff member and one member of management
- Goal: represent all positions
- Current distribution by position:
 - Executive Director
 - Chief Information Officer (CIO)
 - Deputy Director
 - Managing Attorney (co-head)
 - 2 other Managing Attorneys
 - Senior Attorney (co-head)
 - Paralegal



GEOGRAPHIC DIVERSITY

- Goal: Each office is represented
- LASNNY has 6 offices
- Committee Members based on location/position:
 - Albany (Managing Attorney co-leader, Senior Attorney co-leader, and Executive Director)
 - Amsterdam (Deputy Director who supervises 3 offices)
 - Plattsburgh (Managing Attorney)
 - Saratoga Springs (Managing Attorney)
 - Canton (Paralegal)
 - Remote CIO based in NYC



HOW DO WE MEET?

- We are a standing committee.
- Two co-leaders (Senior Attorney and Managing Attorney) plan agenda with input from committee members and ideas raised by other staff/management committee members
 - Co-leaders have a planning meeting prior to the actual committee meeting
 - Agenda is distributed prior to meeting as a group
 - Agenda items may be new or carry over from the prior meeting
- Meetings are on a recurring calendar basis with exceptions made for major conflicts



AT THE MEETING

- Discuss agenda items
- Everyone has an equal voice and brings their individual experiences from their position, practice area, job title, and office
- If an item is not completed, we discuss next steps:
 - Discussing further with Executive Management Team
 - Discussing further with CIO (who is a member of the Committee) or tech support
 - Assigning members to work on specific issues with a deadline
 - Surveying staff for their opinion (formal and informal)
 - Planning for next meeting regarding an agenda item



HISTORY



LASNNY had a prior Tech Committee



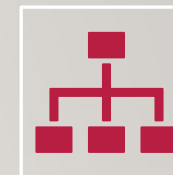
Mid 2010s: LASNNY participated in a year-long training through the Shriver Center where several organization-wide plans were created, including “Knowledge Management”



Preserve institutional knowledge and create tools to efficiently disseminate knowledge to all LASNNY employees



Knowledge Management committee worked separately on technology issues and eventually merged into the “old” Tech Committee



“New” Tech Committee has been an active presence in the organization

LSNYC'S TECH COMMITTEES





HOW LSNYC APPROACHES TECH CHANGE

- LSNYC leverages project- and purpose-specific ad hoc committees for tech and process change.
- A potential project is built around change and business cases using Grant Thornton OCM methods.
- Committees are populated after interviews with project stakeholders and management and staff representatives from all offices.
- Committees recognize and reflect that tech challenges often have cultural and process factors that must be addressed in the solution.

AD HOC COMMITTEE COMPOSITION

Committee composition must represent the full gamut of stakeholders and reflect LSNYC's commitment to DEIB both demographically and positionally.

Committee composition may change over time as projects advance from problem analysis to execution.



FLEXIBLE FUNCTIONS OF AD HOC COMMITTEES

- Developing new solutions from scratch
- Advocating for organization-wide changes
- The roll out/expansion of siloed solutions

DEVELOPING NEW SOLUTIONS FROM SCRATCH

- When a large-scale tech need/problem is identified, a committee is formed to analyze, address, and resolve it.
- The narrow mission of ad hoc committees encourages focus and efficiency. Secondary benefits include team-building and interdepartmental collaboration.
- Committees may be short-term or years-long, depending on the scale of the project and its ongoing support/evaluation needs.
- These committees are usually co-led by a Project Lead and a Change Lead and meet weekly or bi-weekly.

ADVOCATING FOR CHANGE



When an off-the-shelf tech product is implemented, an ad hoc committee may complement the work of the IT department by leading process and cultural implementations.



Process change leadership centers on developing and deploying audience-appropriate and stakeholder-inclusive trainings delivered by credible messengers.



Cultural implementation is achieved by change advocacy, with committee members serving as “tech ambassadors” for their offices and teams.



ROLLOUT OF LOCAL SOLUTIONS

- In some cases, tech solutions are developed “locally” within certain departments or offices that have broad applicability across the organization.
- Here, the committee works to expand and rollout the project to a wider audience.
- The committee may work with IT on technical or content tweaks to “de-silo” a tool; build on a homegrown solution by augmenting it with enterprise scale products; and/or launch change management processes like training and advocacy.



FUN & SUCCESSFUL PROJECTS!

- Committee members go to LSC and NYS Tech Conferences to learn ideas to bring back to the organization each year
 - ✓ Hi! We're here!
- Members of the LSNTAP listserv for ideas



FUN & SUCCESSFUL PROJECTS!

- Microsoft Teams was discovered by a committee member at the 2020 LSC Conference
 - The member tested within his department, recommended adoption, and trained the organization
- Teams changed how LASNNY assigns tasks to law clerks and staff
- We use Teams for many functions:
 - Quick chats, including group chats to share tips and ideas
 - Organizing the Tech Committee and other groups
 - Video meetings
 - Sharing documents quickly among staff without sending several emails
 - Many other ways
- We cannot emphasize enough using Teams!



FUN & SUCCESSFUL PROJECTS!

- The Committee identified issues with onboarding new employees to our internal systems
- The resulting recommendation was a list that tech support automatically sends anyone submitting a helpdesk ticket to ensure appropriate new employee set up:
 - Name
 - Title
 - Legal Server group (based on location and supervisor)
 - Start Date
 - Any groups the user will need to be added (practice workgroups)
 - The office they are located in
 - PC name (if known)
 - Phone Extension (if known)



FUN & SUCCESSFUL PROJECTS!

- Created a staff directory in SharePoint so people can learn about their colleagues
 - A years long idea from a long-time member of the Committee who is now a Managing Attorney
 - We call it a staff directory but it consists of all employees.
- Staff can:
 - Find notaries in any office
 - Determine who practices what law in different offices (i.e., housing law in Albany covering Schenectady County)
 - Quickly obtain someone's phone number or extension if they don't have a phone list on hand
 - Discover who has experience in areas that are not being practiced in current roles
 - See pictures of their colleagues if they have not met (voluntary for pictures)(some pets are featured)



STAFF DIRECTORY

Edit all Copy link

Mike Telfer

Picture

Add an image

Pronouns (ex. she, her, hers)

he, him, his

Area of Practice

SSI / SSD

Notary

✓

emergency contact (optional)

Enter value here

Attachments

Name

Mike Telfer

Office

Albany

Grants (please include county/counties covered)

DAP (Albany, Columbia, Greene, Rensselaer, and Schenectady).

Other Contact

518-533-5933

Extension

386

Job Title

Senior Attorney

Hello

I've been doing Social Security disability work for over 10 years. I have prior experience in long-term disability and criminal law. I'm always looking for new hiking trails.

See more

Supervisor

Peter Racette



FUN & SUCCESSFUL PROJECTS!

- Document Management with SharePoint
 - The Tech Committee and its predecessor committees were involved in a years long effort to migrate LASNNY to “new SharePoint” using Office 365 from our “old SharePoint”
 - Created naming conventions for saving documents and “buckets” for where information is stored (i.e., Forms is separated into “For Supervisor Approval,” “Cases and Clients,” “Cases and Clients Translated,” “Evaluation,” and “Letterheads”)
 - Oversaw which files to migrate to the “new SharePoint”



FUN & SUCCESSFUL PROJECTS!

- Document Management with SharePoint
 - Workgroups have their own pages to upload helpful, relevant documents (i.e., CLE materials, forms specific to the workgroup, and information for new employees and law clerks to the workgroup)
 - A Legal Library was created containing samples and trainings that are uploaded with descriptions and outcomes (similar to a brief bank but contains much more)
 - Updated calendar system so everyone can scroll one page to view other office's calendars to know when people are on leave/out of the office.



SHAREPOINT LANDING PAGE

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FUN & SUCCESSFUL PROJECTS!

- Tech Talks
 - Began during early COVID to train employees on various tech software working remotely
 - Evolved into widely attended live and recorded trainings every 2 months
 - Recent topics: Nuance (PDF editing), Legal Server (including texting from it), Word, efficiency tips, and Outlook
 - Employees greatly appreciated the “talks” - they ask questions and share tips, and new employees are asked to watch the trainings
 - We put together a Rapid Fire Tech Talk on various tech tools and tips, which employees also enjoyed
 - Created a FAQ folder in SharePoint containing recorded trainings and guides put together by the Committee



FUN & SUCCESSFUL PROJECTS!

- Making life easier!
 - Committee was responsible for introducing remote faxing which has made requesting records and faxing agencies so much easier
 - Responsible for requesting and testing advanced PDF editing software
 - Employees are asked to contact specific members of the Tech Committee to resolve issues with phones, Internet, and faxes in the office before contacting tech support (we contract with an outside organization for tech support so this saves \$)
 - Employees are encouraged to contact members of the Committee with ideas they may have that we look into and/or test out



CASE STUDY: COURT INTAKE

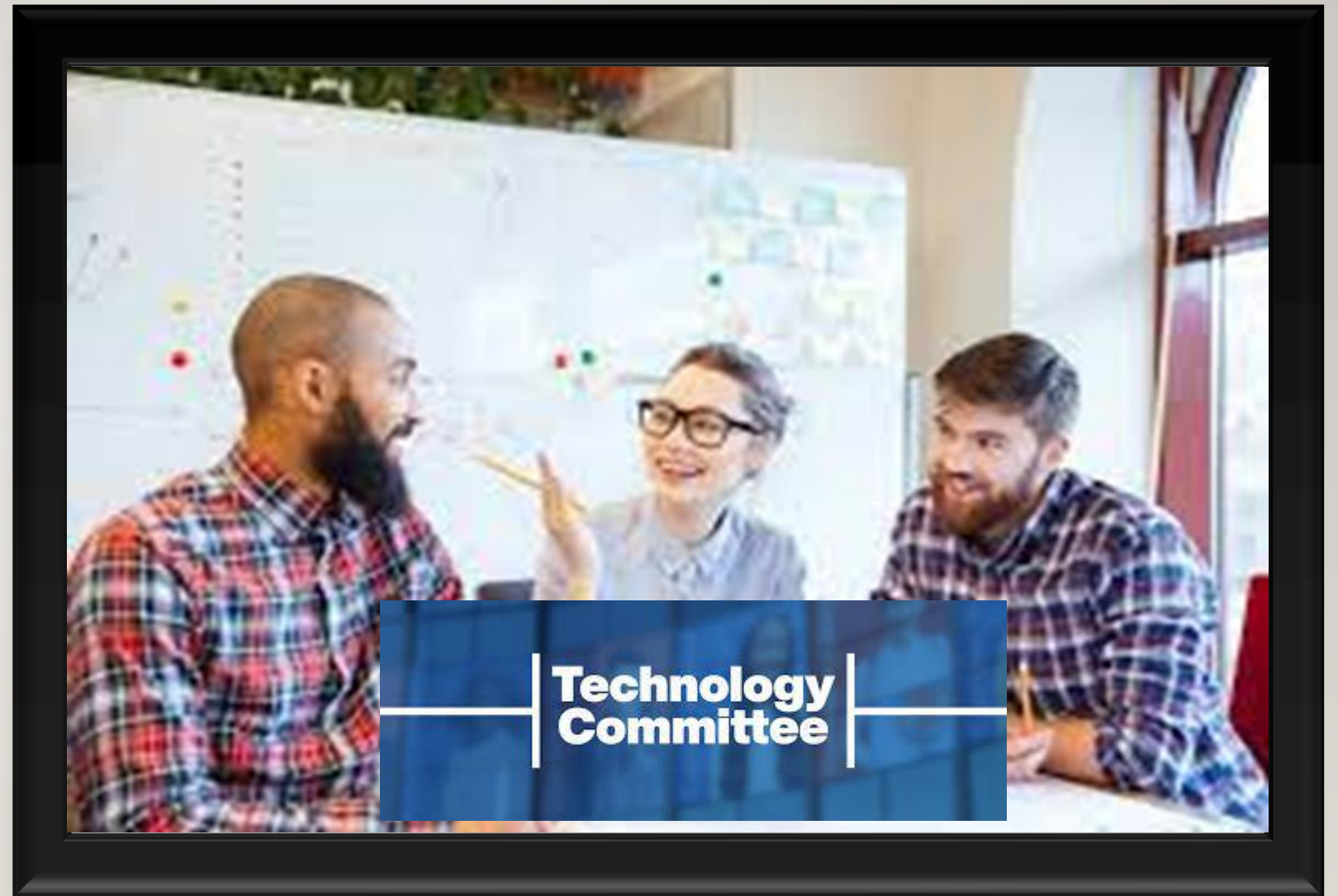
- Onsite court intake was a paper-based process with significant lags from client engagement to case management integration.
- A group of technically proficient employees developed an online solution accessible by tablet.
- A committee was formed to evangelize the technology among legal workers and to train court advocates on the tools.
- Now most court intakes are performed by tablet, with client and case info instantaneously uploaded to the case management system.



CASE STUDY: KNOWLEDGE MANAGEMENT

- Several departments had independently built and used small-scale knowledge banks to make legal work more efficient.
- The organization sought to build on this work and address the need for comprehensive knowledge management, globally.
- A committee was formed to evaluate the needs, explore the bounds of available products and technologies, and identify consultants to assist.
- LSNYC has now initiated a transformative KM project, in concert with key funders, that includes building and integrating knowledge banks, automation, and intelligent search into our legal workflow.

CREATING YOUR TECH COMMITTEES



STANDING COMMITTEE PROS AND CONS

PROS

- Familiar with each other and know what works best for each member
- Familiar with the work Committee can and cannot do
- As a result, Committee is faster in producing work product
- Knows when to meet and what to schedule around the meetings
- Employees become familiar with who to ask questions to and provide ideas
- The management members of the Committee are a direct line to the rest of management and vice versa as a recognized part of the organization
- Direct access to technology partners for troubleshooting and implementing ideas as a recognized part of the organization

CONS

- As people leave the organization, it may become harder to replace members by title and geographic location
- With generational changes in the organization and as people on the Committee are promoted, it becomes harder to balance an equal staff and management makeup without replacing long-term members
- It may be hard to have specific titles on the Committee due to work commitments/grant requirements
- Other work may take over the Committee backlogging its goals
- Resources may be thin to engage in new ideas if they are not allocated well
- If there is not a system to facilitate new ideas, the Committee can become too closed mind in approaching issues.

AD HOC COMMITTEE PROS AND CONS

PROS

- Committee is created for a purpose and is focused on a specific project.
- Reduces fatigue of committee members.
- Increases engagement with target audiences by constantly diversifying messengers of change.
- Flexible to accommodate different kinds of expertise for different projects.
- Increases visibility of diverse staff and management members across the organization.
- Many more staff members learn about OCM and IT issues by joining ad hoc committees.
- Allows for more employees to have a say and voice in the change process.

CONS

- “Go-to” committee members may be come hyperextended if regularly committed to multiple committees.
- Coordination of schedules and meeting management can be difficult.
- Early progress is slowed by learning curves for those new to the process and challenges.
- Containment of sensitive information can be challenging in early project phases.
- Committee buy-in and consensus building is more challenging with ever changing groups.

KEYS TO SUCCESS OF A TECH COMMITTEE

- Buy in from employees (staff and management) is key to the success of a Tech Committee.
 - Employees should know how their ideas are used and acknowledged for them.
- It's important to let employees know what's going on in projects.
 - The members of the LASNNY Tech Committee will provide updates in our Tech Talks, office meetings, or organization-wide meetings.
 - All members of the Committee should be updated even if they are not specifically working on a project.
- Surveying of employees (staff and management) from all levels is suggested when implementing new ideas or soliciting trainings.

KEYS TO SUCCESS OF A TECH COMMITTEE

- All members should be given an equal opportunity to work on projects and everyone's voice should be treated equally regardless of titles.
- Outside Committee employees may be utilized for help with projects and their contributions should be acknowledged when projects are completed as essential parts of the Committee's work.

KEYS TO SUCCESS OF A TECH COMMITTEE

- When rolling out new software or projects, it's important to solicit “beta testers”
 - Can be Committee members, members of a unit, job titles in specific offices, specific employees, etc.
 - It is suggested to obtain a range of positions and employees who are familiar with using technology and those who may be adverse to using new technology.
 - These beta testers are important to utilize before something is introduced to all employees.
 - The testers may identify issues the Committee did not think about, whether positive or negative.

KEYS TO SUCCESS OF A TECH COMMITTEE

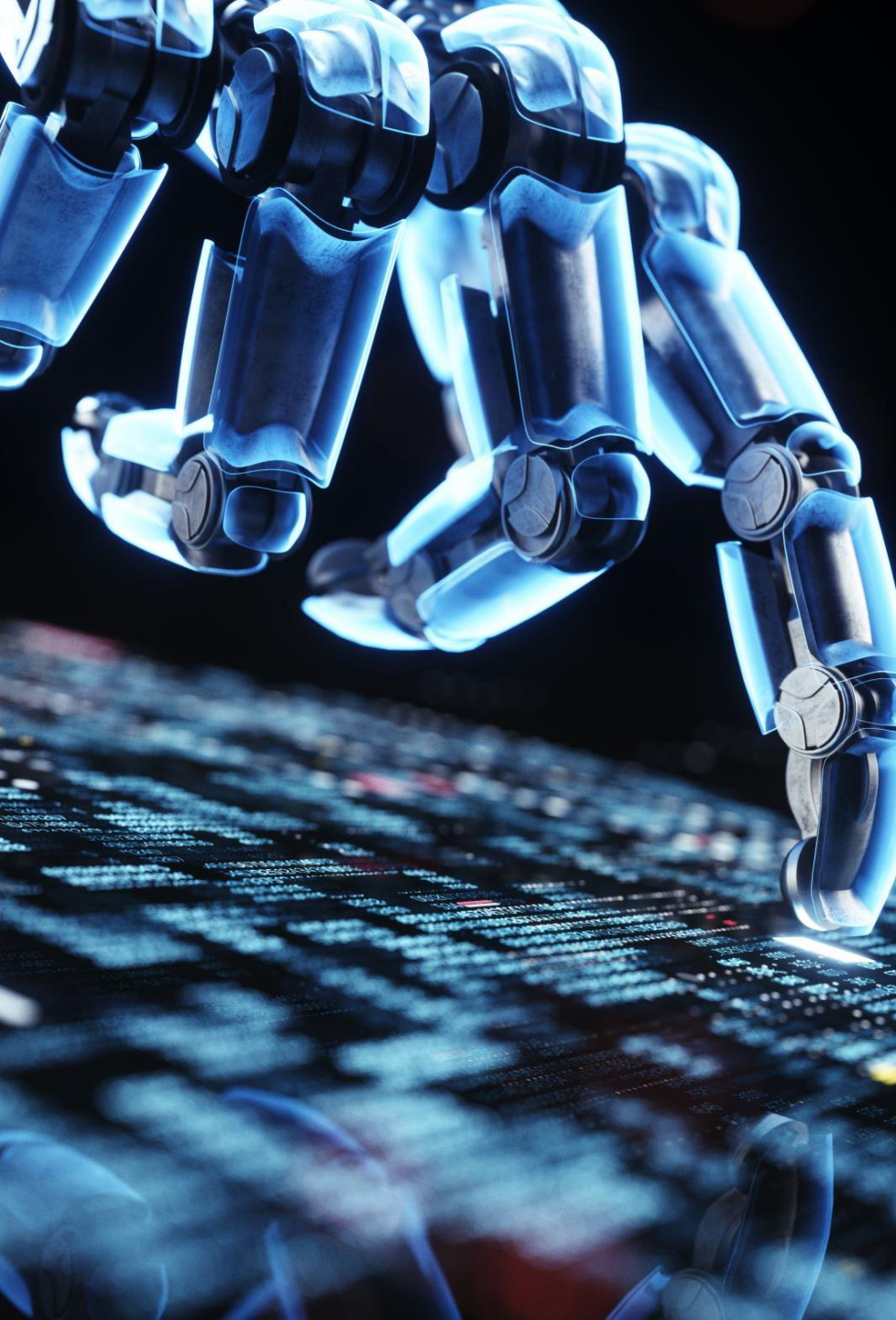
BETA TESTERS BECOMING CHAMPIONS

- Beta testers may be your best advertisement for rolling out new projects to the organization.
- They may start spreading the word among other employees regarding the new project to be implemented.
- Once a project is rolled out officially, the beta testers may become “champions” and experts about the project to advertise its use to the greater organization.
- This gives employees an opportunity to feel their voice is heard and allows employees to be part of decision-making.



KEYS TO SUCCESS OF A TECH COMMITTEE

- When rolling out projects, there should be opportunities for retraining of employees.
 - It is encouraged that large trainings be recorded and saved in an easy to locate spot.
 - Trainings should be short and a written guide for the material should be included.
 - Trainings might need to be updated year to year.
 - It's important that employees be given the contact information of employees who have become experts for one-on-one trainings if needed.
 - FAQs can also be created as a preventive solution or based on questions employees ask.



If you did not have a
Technology
Committee, are you
planning on discussing
creating one?

FINAL POLL

THE END

- Hi! Thanks for coming and reading our PowerPoint!
- Do you have any questions that you want to ask offline?
 - Feel free to email any of us:
 - Mike Telfer: mtelfer@lasnny.org
 - Erica Ludwick: eludwick@lasnny.org
 - Alexander Horwitz: ahorwitz@lsnyc.org
- Good luck with your Tech Committees and enjoy the rest of the conference!