Christine Fecko:

Good afternoon and welcome to day two of the 2023 New York State Technology Conference. I'm Christine Fecko, the General Counsel at the New York State IOLA Fund. First, we have some quick housekeeping notes. As people are filing in, I'll just go through this. First off, this is the Leadership Panel, and we are happy to offer a cross section of civil legal services leaders who will talk about how they are managing their programs with respect to technology. So if you're in the wrong room, this is a good time to exit and check out one of the other excellent sessions. We won't be offended, I promise. Today, we're going to try to cover five topics that some or all of our panelists will address.

To keep us on track, we're going to stick to a specific timeframe for each topic. If there's time within that time limit, we'll take questions as we go. We also expect to have some time at the end of the session for additional questions on the topics we covered and anything else that you would like to bring up. Speaking of questions, you can put them in the chat, which for most of you should be at the ribbon across the top. The Q&A function for this conference, if any of you joined us yesterday you'll know, is not working. It's disabled. My wonderful IOLA colleague, Colleen Fehringer, will be monitoring questions in the chat, and will speak up and poke us if we get off track, time-wise or otherwise. So Colleen, please do feel free to jump in.

I'm happy to announce that for the first time, and thanks to our friends at Skadden, this free conference is also offering free CLE credit. CLE information is on the Permanent Commission's website, and you'll also get an email after the conference is over with more details. To receive credit, you must attend the entire session, which is 50 minutes, report the CLE code that I'll give sometime during the session and then submit your online form within a week.

In the materials, you'll see that our panelists have generously shared examples of written policies, relating to remote work, security, equipment usage and project management to help inform how you might approach these issues in your own office. Please note however, that we're not going to be going over those policies in detail, but they're just there for your reference. Finally, we do not have any polls. This is a very low-tech conversation that we're hoping to have, but we do invite people who are joining us to help us understand who's in the room. Please put in the chat the name of your organization, your title, and your location. It'll give us a bit of a visual cue that's missing with not being live. Again, thank you, Colleen, for putting that note in the chat, so just please introduce yourself there. That concludes the official housekeeping. We're going to take about 20 minutes for our first topic and the question I'm

asking our panelists to talk about is whether they're fully remote, fully in-person or hybrid and to share an advantage or a challenge with your approach.

The full bios for our panelists are linked in the conference agenda that was emailed out and is on the website, but before each panelist answers my first question relating to hybrid work, please quickly introduce themselves and their organizations, including the nature of your practice, your service area, and your approximate number of staff. So with that, Kristen, you want to kick us off?

Kristin Brown:

Sure. So I'm sorry, Christine, are we going around with introductions and then our answers or are we doing it all together?

Christine Fecko:

No, we can do it all at once.

Kristin Brown:

Okay, great. So hi everyone. I'm Kristin Brown, I'm president and CEO of Empire Justice Center. We are a statewide civil legal aid organization. We have seven offices across the state and about 80 employees. As an organization we focus on systems change work and we use a 360 degree strategy to identify patterns and barriers within our client representation. Then, we use our legal tools for policy advocacy, impact litigation, training, and technical assistance as ways to make the law work for our client communities.

In terms of my response to Christine's question, Empire Justice adopted a hybrid approach once we reopened our offices after the pandemic. And that is something that we felt was an important thing to do in part because we are not just direct services. We do have our systems change strategy and so it's not necessary for everyone to be in the office to do their work, but also because as we all know, not-for-profit organizations are resource challenged and we're competing with government entities, we're competing with private law firms and our pay is not what it could be. So we felt like it was really important to adopt a hybrid approach when we returned to the office to help with recruitment and retention of our staff. So, far it's worked really well.

Christine Fecko:

Awesome. Thank you. Nadine, you want to go next?

Nadine Patterson:

Sure. Nadine Patterson, Legal Aid Bureau of Buffalo. I'm Deputy Executive Director. Legal Aid is based in Buffalo. We are a direct service provider and we have about 125 employees on site. Our agency has four different legal services units. On the criminal side, we are the public defender's office in the City of Buffalo and it has a small felony unit handling D and E felonies that arise out of the City of Buffalo. We also have an appeals and post-conviction unit that handles criminal appeals and post-conviction proceedings in seven counties that aren't necessarily all within the Eighth Judicial District. On the civil side, we have an Attorneys for Children Unit, who are assigned by the courts to represent children in the Erie County Family Court.

And then, there's our Civil Legal Service Unit that provides legal representation and assistance to residents throughout the eight counties of the Eighth Judicial District. We are unionized. So as far as the remote work policy, we don't have one. Given the challenges of the different work of the different units and the needs of each unit, we have not been able to come up with a formal remote work policy. At this point, our employees are entirely in the office. They do work entirely from inside the office, and probably the biggest challenge that's created or one of the biggest challenges is that it is difficult to become competitive with other employers that are allowing work from home policies, and it's forced us to explore things like sign on-bonuses.

We looked at our holiday schedules, vacation times, things like that to add different benefits where we can. Though we have no formal remote work from home policy, we do promote staff equity in the workplace by allowing the employees to occasionally work remotely based on their individual needs. Those are typically personal needs or family needs. Then, we find this to be a win-win situation because the attorneys would rather cover their own cases when they can, even if they're not in the office, and it frees up management from arranging coverage for cases where cases can be covered virtually.

Christine Fecko:

Thanks, Nadine. Raun, you want to take it next?

Raun Rasmussen:

Sure. Hi everybody, I'm Raun Rasmussen. I'm the Executive Director of Legal Services NYC. We're a Legal Services Corporation funded, free civil legal services program based in New York City. We have a staff of about 650 based in 11 offices throughout all five boroughs of the City. Our model is to provide a high volume of direct legal services to more than 110,000 people every year and also, to learn from our

clients and from the communities in which community based organizations that we work with about the laws, practices and policies that are hurting our clients, and we bring impact litigation and other kinds of advocacy to change those laws, practices and policies. We are a unionized program and in October of 2021, we negotiated a remote work policy that is in the materials. It permits people to work remotely up to 50% of a pay period.

It's a two-week period, so it could be two days remotely, one week and three days remotely, remotely in the other week, up to 50%, for all of those whose jobs can be performed remotely. So not reception, not maintenance, but pretty much everybody else could work from home. It applies to all of our staff and all of our managers, the same policy, and we're about a year in and we're still seeing how it works. I will respond to another question, I think about that in just a minute.

Christine Fecko:

Fair enough, Raun. Susan, you're going to close us out on this topic.

Susan Shin:

Great. Hi everyone, my name is Susan Shin. I'm the Legal Director of New Economy Project, which is located in New York City and like Kristen's organization, we don't do just direct legal services, we also engage in a lot of policy advocacy as well as community education and other types of work. I think it's fair to say we're by far, the smallest organization represented on this panel. We currently have 17 staff overall, and that's actually after some recent growth and that includes a core legal team of five people, which consists of me, three staff attorneys and a paralegal as well as sometimes law interns. We work towards economic and racial justice using different strategies and through our legal advocacy, the heart of which is a hotline we run for low income New York City residents, we provide limited scope legal assistance on financial justice issues. From that hotline also stems our impact litigation and policy advocacy work.

Most of our staff switched to working remotely when the pandemic began and we are still actually working mostly remotely. We are just about to transition to a hybrid policy where different teams are going to be meeting in the office at least one day a week. Interestingly, the size of our staff grew pretty significantly during the pandemic. We're almost actually too big for our physical office space. As we transition to this hybrid policy, we're planning to rotate staff among desks and computers, rather than having desks and computers assigned in a fixed way to specific staffers as we had done before the pandemic.

For us, the challenges of working remotely, though I will say there have been many benefits, but the challenges have been onboarding and really integrating new staff, rolling out some of the new tech changes, the systems and platforms we've started to use during the pandemic, and bonding with these new colleagues, especially when they're on other teams that we don't work with regularly.

Christine Fecko:

Thanks so much. I hope everyone appreciates that we really do have a cross section of people. Trust me, Susan, you are not the only small program throughout New York State or probably the smallest. There's a number of small programs here, so I'm sure people are really interested in what you're going to share. I don't see any questions related to remote work, Colleen, am I right on that?

Colleen Fehringer:

You're right. Although people are sharing in the chat how their organizations are handling hybrid work, so if you want to see from your other colleagues, you can read it there.

Christine Fecko:

Great. Thanks for pointing that out. We'll move on to our second topic then, which is talking about decision making and change management, always a hot topic at these technology conferences. I think everyone is often really curious about how you can move your staff. Aside from your remote or hybrid policy, I'm wondering, what is the new or newly revised policy that you've adopted that responds to the technology changes in your practice since the pandemic? Tell us something about how that policy came about or how your decisions are being made. How are you approaching change management? I know I'm saying a lot and we've only got about 10 minutes for this question. Susan, I think you were going to start on this topic.

Susan Shin:

As I mentioned, we run a legal hotline for low-income New York City residents. It's a live hotline and when the pandemic began, we had to figure out a way to operate it remotely and we found an app called MightyCall that enabled us to do that really effectively. It was easy for staff to use. It was easy to train people to use. With that app, we gained the capacity to text with our hotline callers, which is something we hadn't been able to do before, and that's proved invaluable when we're working with callers who are uncomfortable using email or who are unable to reach us during our set hotline hours.

After that wonderful honeymoon, we as an organization made a big change where we changed our phone system to voiceover internet protocol or VoIP.

The hope was that we would be able to operate our hotline through VoIP, and I will say publicly, it's been more or less a disaster. There's been a lot of technical glitches with respect to our hotline. We lost some functionality. It was very difficult to rotate among the different hotline staffers who were assigned to staff the hotline on particular days. After that brief saga, we are now going back to this app, which thankfully in our time away from it has actually improved. For example, people weren't able to text us files before, but now they can. I think that's going to make it a lot easier for people in general to send us documents. As for the decision-making process, we're a small organization. I'm one of four people on our management team, which consists of our two co-directors, our associate director and myself.

So the process can be pretty straightforward, but it does pull in different staff, depending on the situation. Getting everyone on the same page while working remotely has been a little bit harder, but I would say that the decision to switch to the app in the first instance was very easy. There was a clear need and our colleague found this app right away. The decision to go to the VoIP involved the whole organization. It was an attempt, I think, to mitigate some of the remote work culture. So for instance, everyone was working off of their cell phone with their cell phone numbers and we wanted to go back to having people use their work numbers. Since it turned out that the VoIP didn't meet our specific hotline operational needs, the legal team and the management team worked together to figure out how quickly to go back.

It was a huge learning experience. As for training people on these new changes, that's all happened remotely, and I would say that it's actually worked out really well.

Christine Fecko:

I think it's an important thing to just pause and acknowledge that people are sometimes afraid of failure. I think trying something, failing, learning from it, trying something else is a really important approach, especially when it's technology. I think you can get overly invested in one idea and afraid to iterate. Kristen, you want to jump in on this discussion?

Kristin Brown:

Sure, happy to. I'm going to focus on some of the change management and project management work that we've been doing. At the outset of the pandemic, and the way that we were able to develop the hybrid work policy for coming back from the pandemic, was that we created a team across the

organization and offices with representatives from the various practice groups. We met weekly to be able to respond in real time because everything was changing so quickly. Then, through that team, we pulled folks together to create the hybrid work policy that we then implemented. As Christine mentioned, the policy is in your materials, but this idea of when we were implementing a change, to bring our staff together to work together as a team has been really successful.

We've just ended our first year of our strategic plan and have been doing an immense amount of operations improvements and building infrastructure within the organization. One of the things that I wanted to share is just that we've come to understand that, as a not-for-profit, we can't always afford the staff time or the level of expertise that we need to implement the new systems. By embracing the utilization of outsourced and contract based expertise, combined with the project management model which you have in your materials that brings in staff participation into the implementation process, we've been rather successful in moving through a lot of changes within the organization.

To give you a sense of this, over the last couple of years since 2020, we've moved from an internal finance office to outsourced accounting, we've moved from a hard line to a voiceover IP phone system, we've moved our case management system from Time to Legal server, we moved from Net Docs to SharePoint for our document management system, we've moved our email from office servers to cloud-based Microsoft 365, and we've also transitioned to a new marketing platform for our newsletters and fundraising communications. We're now in the process of a branding refresh and we use this same strategy to develop our strategic plan. So it's been a lot of change. It's been a lot all at once, but what we have found is that it is a good model for sharing information out and getting organizational buy-in, and we hope it might be helpful to you as well.

Christine Fecko:

Kristin, that's a lot of change and I just want to make a plug here. I hope any IOLA grantees in our session know that IOLA is very supportive of infrastructure support. We have seen many large and small organizations struggle and even fail because they don't have enough infrastructure in place. If you have a question about that, feel free to reach out to us and we can talk more about it. Raun, I think you had something to contribute on this topic as well.

Raun Rasmussen:

This is actually also related to change management. We have an in-house IT team of about 10, and one of the things we have noticed over time is that although they're awesome, they're not always awesome

at change management. We would get massive changes to timekeeping, to phone changes to our Ignite systems launched with great training, but no advance engagement in decision making. In addition, and I think this was aggravated by the pandemic, we realized that changes were being made internally without the input of our finance team, our grants and contracts team, and without real effective engagement with the stakeholders. We are an organization that likes to challenge authority. That's who we hire and that's how we roll.

So that means that sometimes when changes are adopted, if we don't have the right people in the room involved in the change making process, it can be problematic. We have engaged an outside consultant who is working with us in a really big project right now to address change management issues with respect to our financial management, internal systems and processes, and grants and contracts management systems and processes. It's been a very important engagement that I think is going to have far-reaching benefits for the organization, having to do with some real basic things that I think everybody understands, but we don't always do effectively. It's important to be real clear in problem identification, making sure the right stakeholders are in the room, making sure that there is shared responsibility for problem solving and decision making, and making sure that there is effective, sometimes elaborate communication throughout change processes. Then, of course, implementation, memorialization and, as our consultant likes to describe it, return to homeroom for future implementation, operation, and growth. Echoing what Christine said, IOLA is super supportive of these kinds of initiatives. I really think it's important that as we build the infrastructure foundations for the work that we do.

Christine Fecko:

I love it. I want to just point out that our panelists are happy to share names and there was a question for Susan about the app you used. If people have questions about that, we can take them now or you can put it in the chat. You can also hunt the panelists down later and get more details from Raun about this awesome change management consultant who's working with him or talk to Kristen about the outsourced people that she's been working with on all the different changes. Colleen, do we have any questions in the chat related to change management?

Colleen Fehringer:

Not about change management, but there are a number of questions about office culture in a hybrid or remote work situation and also about onboarding new staff during hybrid or remote work. If our panelists have something to say about that, that might be helpful.

Christine Fecko:

It's a jump ball. Anyone got something to add on this? Want to say something about culture in your office, how you're managing it?

Nadine Patterson:

I'll take the onboarding. We have had, as everybody else, a lot of technology change. For those of you calling in, this is Nadine Patterson from Legal Aid again. We actually have a multi-tiered onboarding. It starts with our HR obviously, describing the bigger policies and the issues. Then, it goes to our IT level where they're explaining to them things like signing in and out with the time clocks, using our case management system, our document management system, the emails, and all that kind of technology stuff. Our IT department sits with the new hires and goes through all those policies and how to get on and how to access everything. Then they sit with one of the supervisors in the immediate unit that they start in and learn the specifics of what they're supposed to do now that they've learned the broader policies and now that they've learned how to get into the system. They sit with one of the managers, either a managing attorney or a support staff manager to get the details on how you actually do it. So it's much more intense onboarding than it used to be before all these changes.

Christine Fecko:

Anybody want to jump in on the question about culture, how to manage culture where you've got a hybrid or fully remote? I know Susan, you talked a little bit about it already, but if you or anyone else wants to add a word there, please do.

Susan Shin:

I'll mention that we have weekly staff meetings, as I'm sure a lot of organizations do. It used to be more about running through calendars, letting everyone know what's coming up, making sure that things are syncing up if we're speaking to the same elected official, that sort of thing. We noticed that, especially with all of the new staff that we brought on during the pandemic, working remotely has just made it

harder for people to absorb the culture, mission and principles, and vision of the organization through osmosis, through those kitchen conversations or walk by conversations. So we've changed our staff meeting formats to be more of a teach-in opportunity.

We're addressing different topics that go into the work we do at New Economy. We're talking about new economic models and coming up we're going to talk about financial justice and the role of that in creating a new economy. That's one way we've tried to address that office culture gap.

Raun Rasmussen:

Thanks, Susan. I don't have answers for this, but I'm going to raise some of the concerns that we've seen because, as I said, we're one year in. We have concerns about those who are not seen as coming into the offices and they often are lawyers who are in court, rather than in the office. That creates an equity question for people who are in the office all day. You can explain it to people all you want, but if people are not seen, then it seems like they're not coming in as everybody is required to do. We have a concern about clients' ability to access their lawyers and a related concern about new lawyers who may be learning that in person client contact is not critical. That's a concern that we have.

We have a concern about monitoring. What does it mean if we've got a policy that requires people to come in at least 50% of the time and they're not. Who's going to monitor? Is that going to affect our culture? Then, the last thing is really just a concern about what this might mean, this new hybrid workplace for our culture and what is our culture going to be? Is it going to be different? We don't think we're going to know any of those answers for another couple of years because things are still going to be settling and sifting.

Christine Fecko:

I think one thing that's worth noting, and I appreciate you identifying those issues, Raun, even if you don't have answers, is that the hallmark of a good lawyer is issue spotting. I think the issue spotting is an important first step, so thanks for flagging that. I'm going to move on to our third topic and we're going to spend about five minutes on this, just, so a couple words about outsourcing, pros and cons. What are you outsourcing? How's it working? I know Kristin, you're going to kick us off here and you've talked a little bit about that already, but is there anything else you want to add?

Kristin Brown:

I'll just go a little more in depth. One of the most impactful things we've done with outsourcing is shift from the in-office, finance office to an outsourced accounting firm. Part of what we kept finding is that we didn't have enough resources to fully staff a finance office and we would end up with turnover. When someone would leave, we were so close to the margin in terms of being able to get contracts registered and submit vouchers for payment. And we all know that there are delays with (not with IOLA) but delays with getting contracts registered and payments processed, that it was undermining the financial stability of the organization to have an in house finance office. By outsourcing, if someone leaves the team, it's the outsourced business's responsibility to bring someone in to fill that gap.

We also have access to much more robust software for our general ledger, expertise that is at such an incredibly high level because these firms are able to hire people that have vast expertise and only tap them now and then to work with the organizations that are working with them. So that has been a game changer for us, and I think we've seen that in other areas as well, but the difference is most stark from in-house to outsource for us with our financial operations.

Christine Fecko:

Thanks. Susan, you were going to offer some comments on this also.

Susan Shin:

Yes. We have some limited in-house tech capacity, but we do always need some extra help. We used to work with a small IT worker cooperative, and we recently switched to a bigger IT company. While we really liked working with the worker co-op and supporting a worker co-op, I do have to say we now have more consistent and continuous on-call tech support, which has been really helpful. They've helped also with big systems changes, which I'm not sure the smaller co-op could have been able to do, such as setting up a cloud server for us. They're also now helping to make it possible for any staffer to log into any computer in the office as we prepare to transition to some hybrid work.

I will say that another big change in outsourcing has been that we also recently outsourced our HR functions to a PEO, or professional employer organization, and that has tremendously streamlined the benefits administration. Not that I had to bear the burden of that, but it's definitely helped our co-directors and our operations manager and other people who were involved with that at our organization. Having this PEO has both improved the quality and reduced the overall cost to both the organization and to staff of the benefits, especially health insurance. So that's been a great change.

Christine Fecko:

Yes, the PEO arrangement can be super helpful, especially for small organizations, but also mid-size as well, I would think. Colleen, do we have any questions about outsourcing?

Colleen Fehringer:

We don't have any questions about outsourcing. We have some more questions about hybrid work, of course, because I think that's the hot topic of the day. One question is about when folks are in office, are there mandatory precautions like masking or the use of HEPA filters, things like that?

Christine Fecko:

We could take that question. We've got a minute or two here. Anyone want to grab it?

Kristin Brown:

I'll go. We maintained our masking requirement up until probably three or four months ago. We don't have a lot of staff that are coming into the office, and, interestingly enough, it's mostly our staff that are going into court and doing direct services who are in the office. The folks that were in the office were asking, can we please stop wearing masks? So, we did go ahead and stop that practice but only in the last couple of months. We did maintain a requirement that folks sign in when they come into the office so that we can trace if there are any COVID issues, but we're just in this week stopping that process as well. We're really, at this point, back to business as usual when it comes to masking and other precautions.

Christine Fecko:

Anyone else?

Raun Rasmussen:

Yes, we have a masking requirement and do health screening, which is part of reserving an office and is required in all of our offices, but we're in the process of negotiating to eliminate those. We now have five questions on the health screening, but we may keep one health screening question. Mostly, they're going away.

Christine Fecko:

Okay. All right. We're going to move on to topic four, which we're going to spend just five minutes on. How is the court in your region approaching virtual appearances and how is it impacting your staffing? How is it impacting your technology needs? How is it impacting your clients? I know that's a lot of questions in just a few minutes, but Nadine, I think you had a few things here.

Nadine Patterson:

Yes, again, I'm talking from Buffalo, New York, and with regard to the appearances that we do, our criminal matters are all in person. Our Family Court here in Erie County has gone hybrid. If you're going to be in front of a judge, you have to be in person, but if you're with a law clerk or a referee, you do virtual appearances. Then, for our civil legal services, the bulk of our court appearance are in Supreme Court and they're on matrimonial cases. We practice throughout the Eighth Judicial District, and it's been our experience that motions and trials are in person. Most settlement conferences are in person, but everything else is done virtually. Both in the Supreme and Family Court, we have found that the virtual appearances tend to keep the court calendars clicking along and keep them on time.

For the matrimonial practices, it's allowed our attorneys to expand their coverage area. We're able to provide more representation to litigants in the other counties that are outside of Erie County. In a lot of those court cases, if we took them without virtual appearances, it would take us hours to drive back and forth between the courts. It's really added to our ability to extend representation to more people in the further away counties. At a local level in Erie County and spearheaded by the Erie County Bar Association Volunteer Lawyer Project, and I said I would shout out to them, so here it goes, they have worked with the support and assistance of the Eighth Judicial District Access to Justice program and developed what we call the HUB Court, which is used for eviction matters.

The HUB Court in Erie County has taken about 35 Town and Justice Courts in Erie County and consolidated them into a virtual courtroom where the City of Buffalo hearing officer presides over virtual landlord tenant matters. The petitions are filed in the local courts, they're transferred to the HUB Court, they're given a virtual court appearance date, litigants can appear by teams or by phone, and lawyers have electronic access to all the petitions filed and all the court records. The establishment of the HUB Court has allowed the Court to manage this huge wave of eviction matters that came through once the moratorium was lifted. It's allowed the Court to ensure uniformity in the application of the law because all the landlord tenant laws were revamped after the moratorium was lifted.

And, more importantly, it's afforded the civil legal service providers to provide meaningful representation to more litigants in the Town Courts. We can literally, in one HUB Court appearance, represent people in West Seneca and in Springville and in Tonawanda all in one court appearance. Again, to drive to these Justice Courts and Town Courts to give representation would be hours of driving. The current data shows that since the inception of the HUB Court in Erie County, the rates of eviction have been reduced about 35%.

Christine Fecko:

Nadine, that is amazing, and I think the cooperation in Western New York is awesome. I know the issue of representation in the Town and Village Courts is a real difficult pain point, as they say, for all of upstate and Long Island. Those of you out there who want to learn more should be knocking on Nadine's door, but I want to jump now to Raun. I think you had something on the courts and virtual appearances as well. A quick thing.

Raun Rasmussen:

Yes. This will be a short story for New York City. Notwithstanding the Chief Judge's repeated proclamation that we would never return to pre-pandemic court conditions in Housing Court, we have returned to pre-pandemic conditions in Housing Court and in Family Court, for the most part. Virtually everything is in person now. I think that there's still some residual virtual intake in the Bronx, for example, which is beneficial. It allows tenants to do intake by phone, but interestingly, not by Zoom for the most part. Most people are accessing it by phone. In Family Court, there are still more opportunities for clients to appear virtually, and that's especially good for survivors of domestic violence who don't have to go to court to see their abusers.

I think one of the longer term benefits of the courts being virtual for as long as they were during the pandemic is that they got more comfortable dealing with cases virtually. Our sense is that the zeitgeist of there being more requests for accommodations has continued a little bit and that the courts are more responsive because they had more capacity. Aside from that, really things have changed almost exactly back to the way they were.

Christine Fecko:

Speaking of accommodations, I think Susan, your practice is primarily in Civil Court, and you had an observation about that.

Susan Shin:

Yes. In New York City, and I just saw a comment in the chat relevant to this, it's been really hard for our clients to no longer have the virtual option to appear, especially if they have disabilities or medical conditions. It's been hard for people to get timely responses to requests for accommodations because those requests apparently have to go through a judge. I would say that having a virtual option be more widely available would also be helpful for people who have a hard time getting time off of work or finding childcare.

Christine Fecko:

Back to our last topic, as we want to try to end on a positive note, although I would say that the discussion so far has been not unduly negative. I want each of our panelists to discuss in the remaining time, we've got eight minutes, what's the best technology related change that your program has implemented since the pandemic? Kristin, I think you're kicking us off here.

Kristin Brown:

Yes. I would just say, far and away, it would be Zoom and Teams. It's being able to see each other. Communicating through video, calls has been incredibly impactful, and it's dramatically reduced our phone bill. Also, a little bit more specifically, it's allowed me as a CEO of a statewide program to be connected, particularly with our Rochester based providers. We, the directors in Rochester of the legal services organizations are meeting weekly and have been meeting weekly throughout the pandemic. Our organizations are co-located in the Telesca Center for Justice, but with these virtual weekly meetings, we really were able to solidify our relationship. The Empire Justice Center was brought into a collaborative project, the Tenant Defense Program, in large part because of those meetings.

Ultimately, we decided to hire a strategic planning consultant. We did some strategic planning work and we have now soft launched a shared fundraising campaign. We've hired a joint staff member who is now our joint development director for Monroe County. They're employed by Just Cause in Rochester, and they're supervised by Empire Justice and then, LAW New York and Legal Aid of Rochester are part of the partnership. It has been incredibly impactful and we're just really proud of it and wanted to be able to share it with everyone.

Christine Fecko:

Thanks Kristin. I love the cooperation in Western New York. Nadine, I think you are next.

Nadine Patterson:

Yes. Probably one of the biggest things for us has been the online portal that goes with Legal Server. In the last year, we've intaked over 4,700 cases and almost a thousand of those were done by the clients themselves on

our online portal. That's a thousand applications that someone didn't have to weed through, open cases manually, and input data for. It's really helped the functionality and speed up the timeline when people are applying. Additionally, because most of the legal service providers in our local community have Legal Server and we collaborate on a great number of projects, we're beginning to explore the idea of central intake so that they can be using Legal Server online for the intakes and just an internal referral system over to our case management system. I'm a big fan of the online intake.

Christine Fecko:

Love it. We've been talking online intake at this conference for years now, so I'm happy to hear about that. Raun, you want to share your best takeaway?

Raun Rasmussen:

Yes. Our best takeaway is that our pro bono program is now default Zoom and hybrid. It previously was always in person, which we thought was best for clients. Now, we think that's not true. We give clients choices now and two thirds of the time they're choosing virtual. It eliminates travel time, childcare expenses, and dehumanizing Housing Court time. We and the firms that we work with are able to be very flexible with technology, which means that we can find ways to help our clients access services through their technology. We've been able to get more volunteer attorneys from firms with offices worldwide. That's been, I would say, the biggest change.

Two other quick things. One is automation of our access line project. We have an access line that fields 30,000 calls a year. We were previously relying on four different kinds of technology and we're shifting to one. That's a very exciting project that's going to make it very efficient to manage those calls and to assign case appointments for people. It'll go right onto their calendars, right onto our attorney's calendars. The last thing I'll just mention is we've got a knowledge management program, which I would just say is a gleam in our eye at the moment. So more on that to come.

Christine Fecko:

Fair enough. On the pro bono front, I was just at a great City Bar Best Practices event and saw Adam Heintz and heard about how tremendous the pro bono is doing over at your shop, Raun. So that's awesome. Susan, leave us with some parting words here.

Susan Shin:

I mentioned the phone app for our hotline, MightyCall. Slack, which I saw someone refer to in the chat, has also been incredible. It facilitates quick check-ins and conversations among teams. I will mention that our online intake form has been a really helpful new method for our intake. It also imports the data automatically into our client database. I will note that we've recently did a preliminary analysis of the demographics of the people who reach us by calling our hotline versus those who submit our online form. And we saw that the latter group tend to be younger and have more money. The average age for the online forms was 28 versus 51 for phone calls. The average income for the online forms was 34,000 versus 18,000 for phone calls. We definitely see a lot of benefits to the online intake form or portal as we've all noted, but we are thinking about ways that we can make them more accessible to very low income and/or older people.

Christine Fecko:

I love the data analytics. We're going to get you for a data panel next year, Susan. Just watch for it. Colleen, we've got a minute left. What's the top question?

Colleen Fehringer:

Sure. We had a question about whether any of our panelists here have a published or internal document that they'd like to share about onboarding practices

Christine Fecko:

Anyone have a written onboarding protocol. Everyone wants the written policies. They're so helpful, but so time-consuming.

Colleen Fehringer:

Right. We do also have another question for Raun about the integrated calendar system. If he could name the system or talk more about that.

Raun Rasmussen:

I can't name the system, but I'm happy to talk to and to connect whoever is asking that question with the Director of our access line who can give you all the details. It's actually hugely exciting.

Christine Fecko:

All right, with that, I'm unfortunately going to have to conclude our session. We had a really active chat. I so appreciate all of our panelists for taking time out of their day today and the multiple preparation days we had. Thank you all and thank everyone for attending today. We had over 50 people. Thank you so much. We now are going to have a 10-minute break in the Conference, so hit the restroom, go grab your lunch, and you can navigate to the conference webpage and choose your next breakout session, which will start at 2:00. Thank you all, and I hope you enjoy the rest of the conference. Take care.

Raun Rasmussen:

Thanks everybody.