The image features a graphic of the Texas state flag on the left side, consisting of a dark blue vertical bar with a white five-pointed star in the center, and a red horizontal bar at the bottom. The main title is positioned on the white background to the right of the blue bar.

# **Technology Planning for (*gasp!*) Attorneys**

*LSC TIG Conference  
Austin, TX  
January 22, 2009*

# Technology In Support of Advocacy

“It’s all about  
the client”



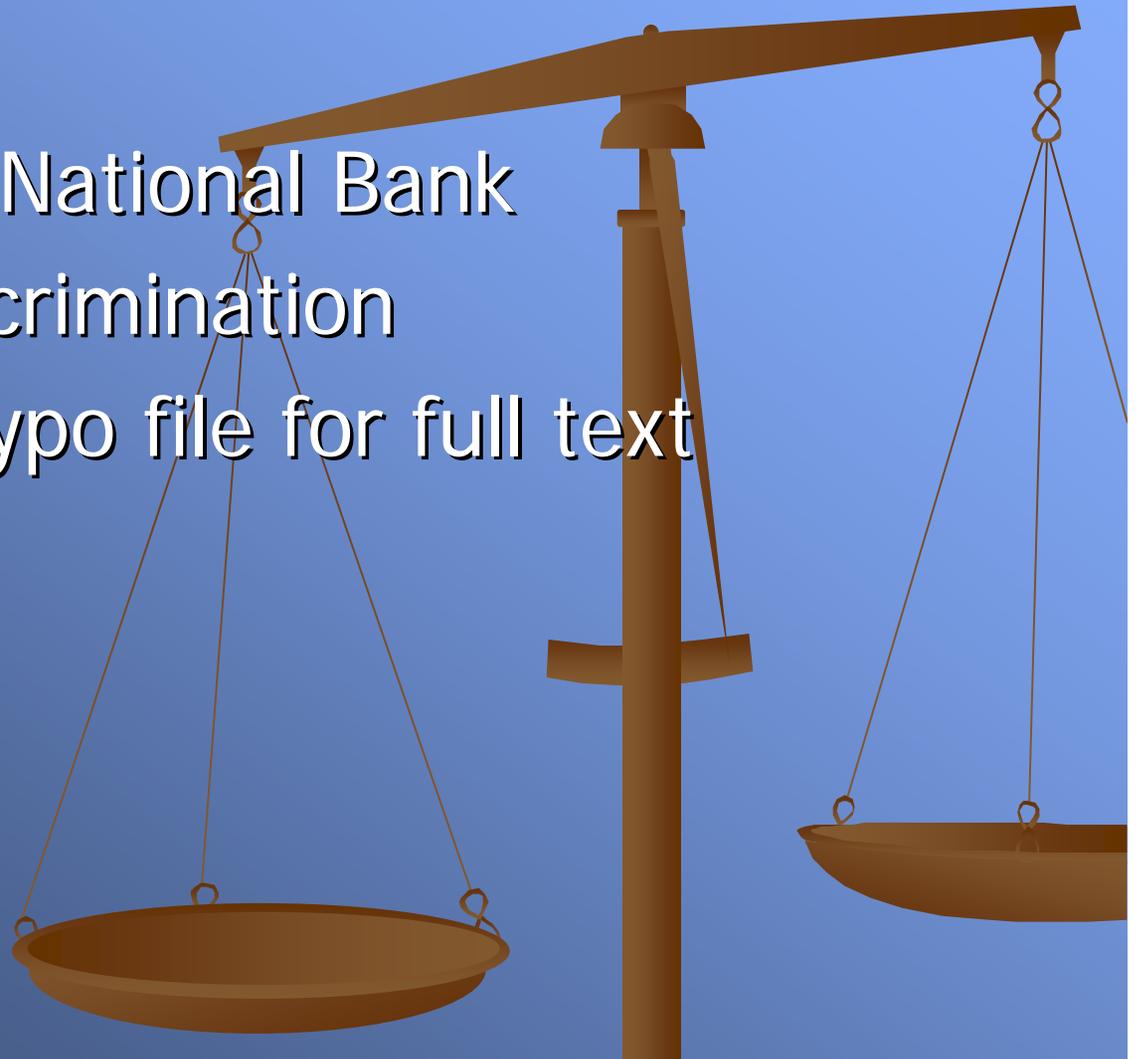
# Technology In Support of Advocacy

- Improve capacity for litigation & other advocacy
- Strengthen community & bar partnerships
- Increase visibility & presence in client communities
- Maximize existing resources & shared infrastructures
- Streamline administrative burdens
- Costs & sustainability



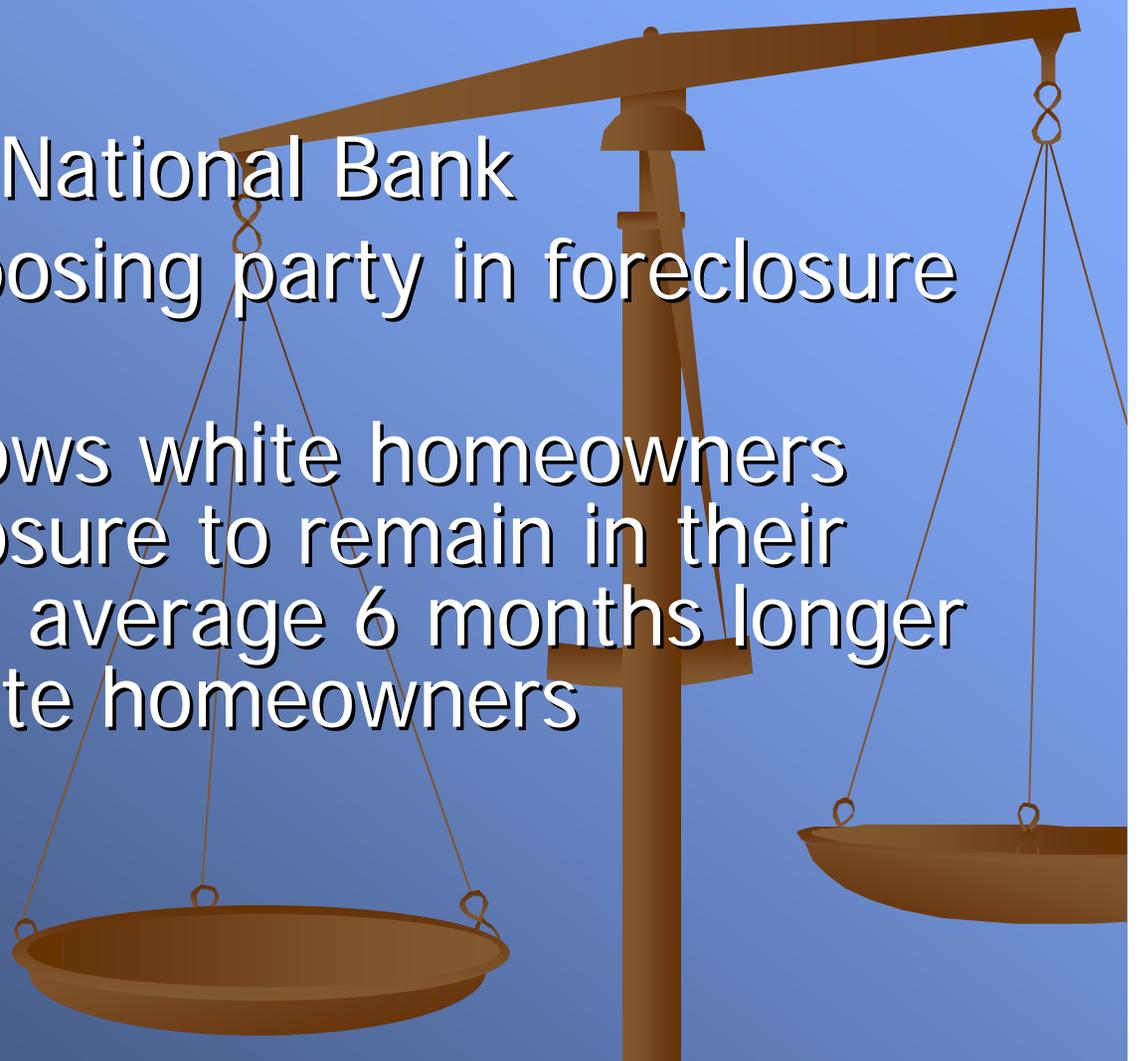
# A Hypothetical Case

- Heart of Texas National Bank
- Foreclosure discrimination
- See separate hypo file for full text



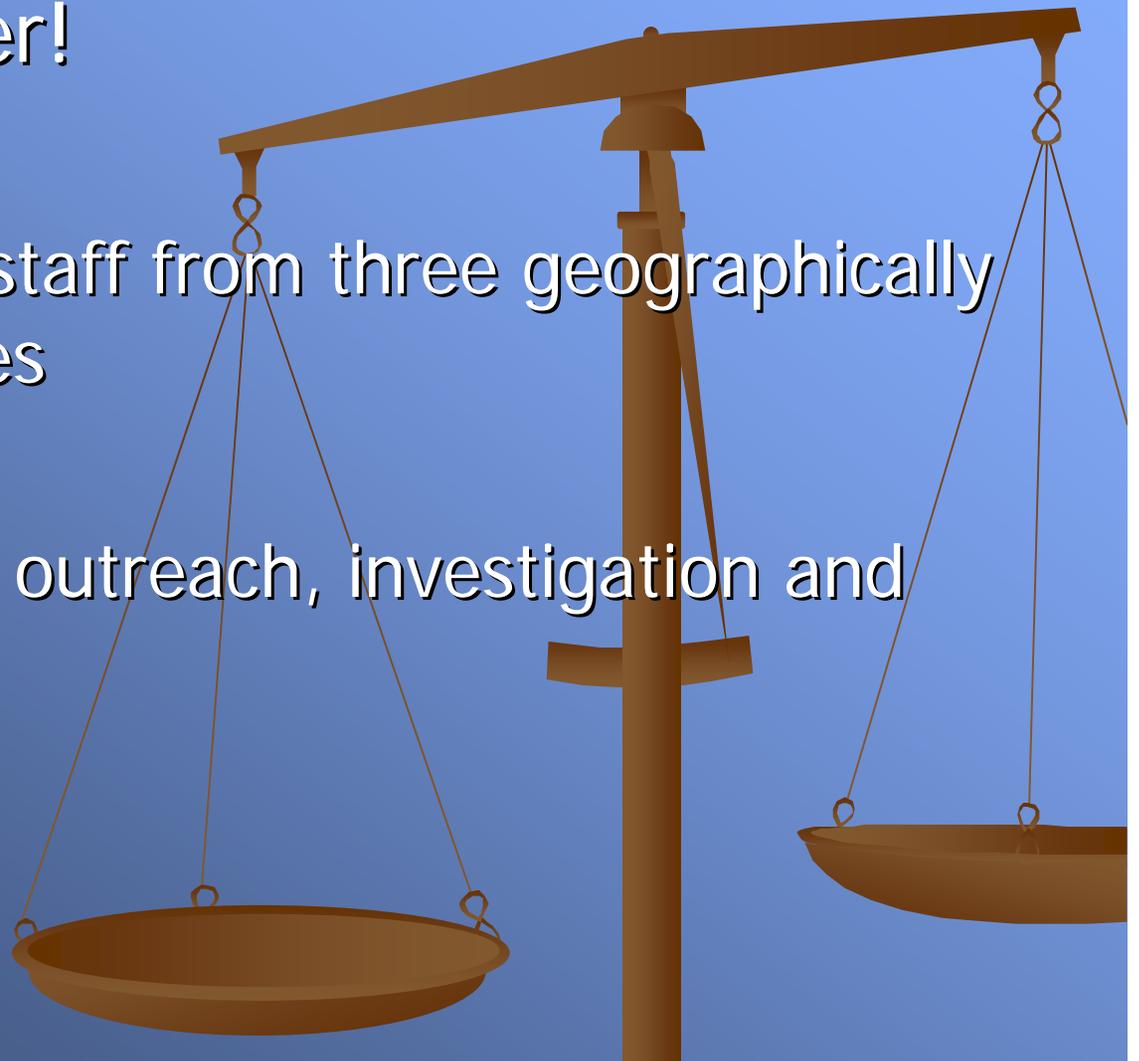
# Hypothetical Case Facts

- Heart of Texas National Bank
  - Frequent opposing party in foreclosure cases
  - The bank allows white homeowners facing foreclosure to remain in their properties on average 6 months longer than non-white homeowners



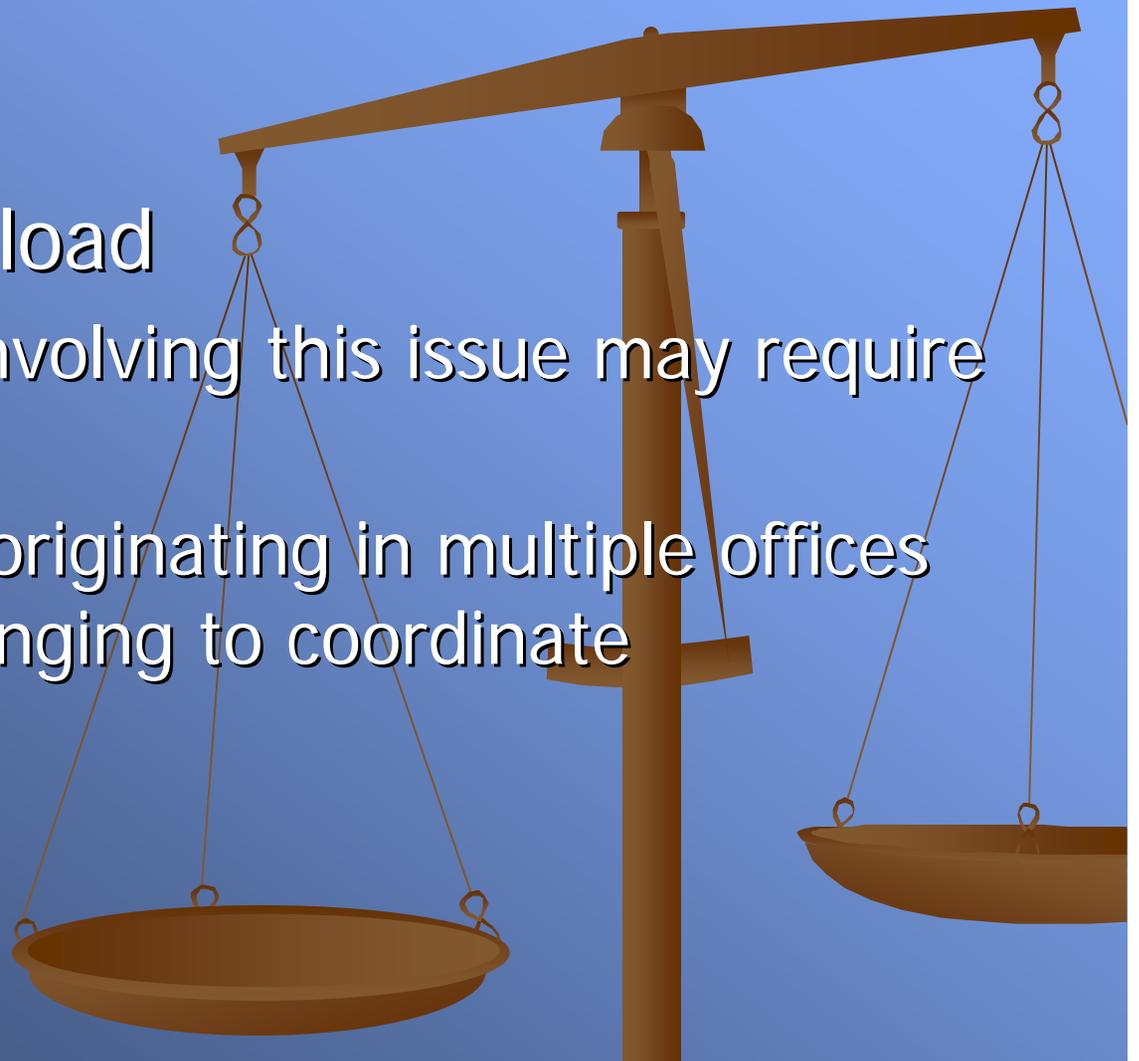
# Advocacy Team

- You're the leader!
  - Team includes staff from three geographically separated offices
  - Responsible for outreach, investigation and litigation



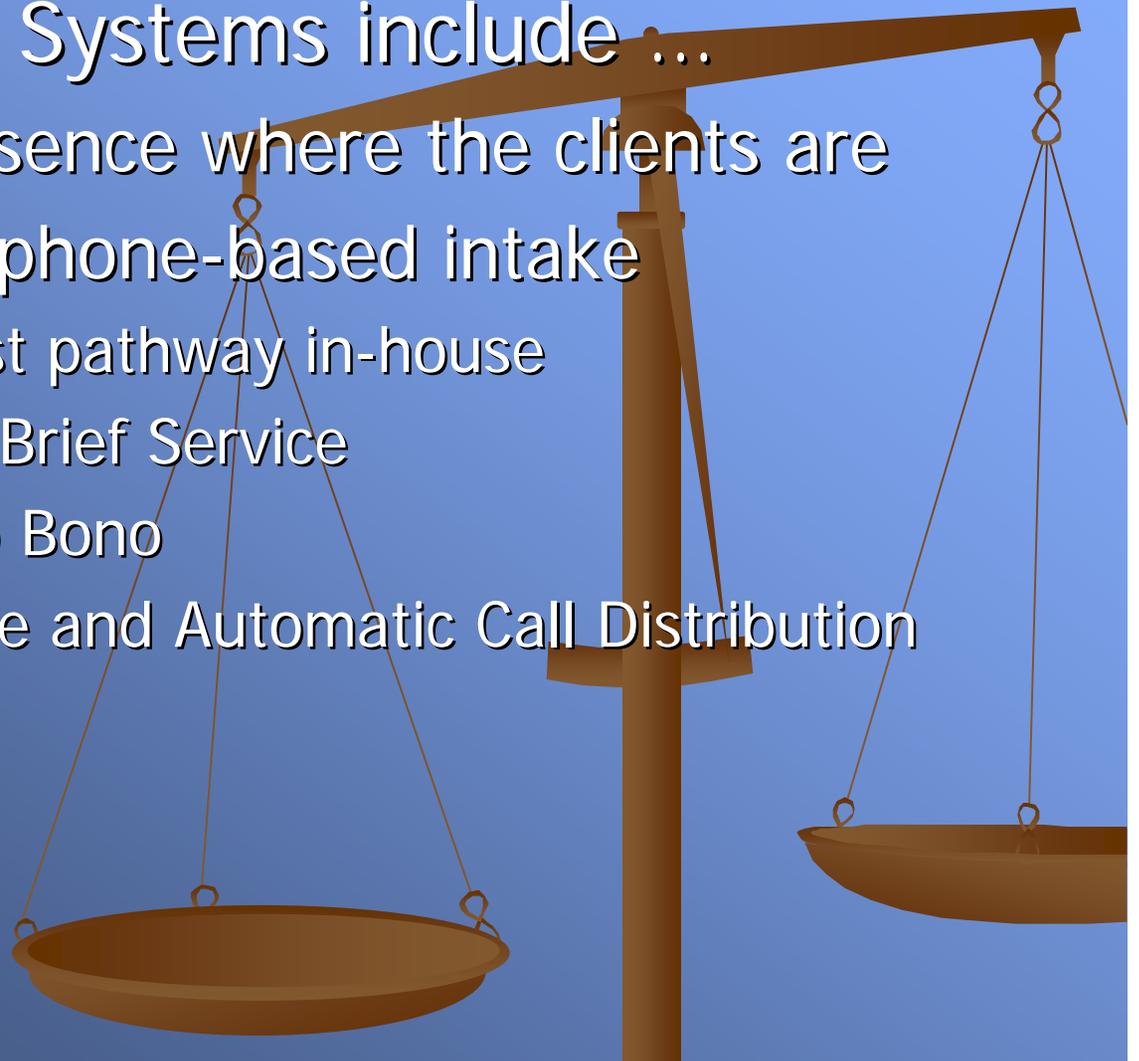
# Resource Issues

- Case work overload
  - A single case involving this issue may require 500 hours+
  - Multiple cases originating in multiple offices could be challenging to coordinate



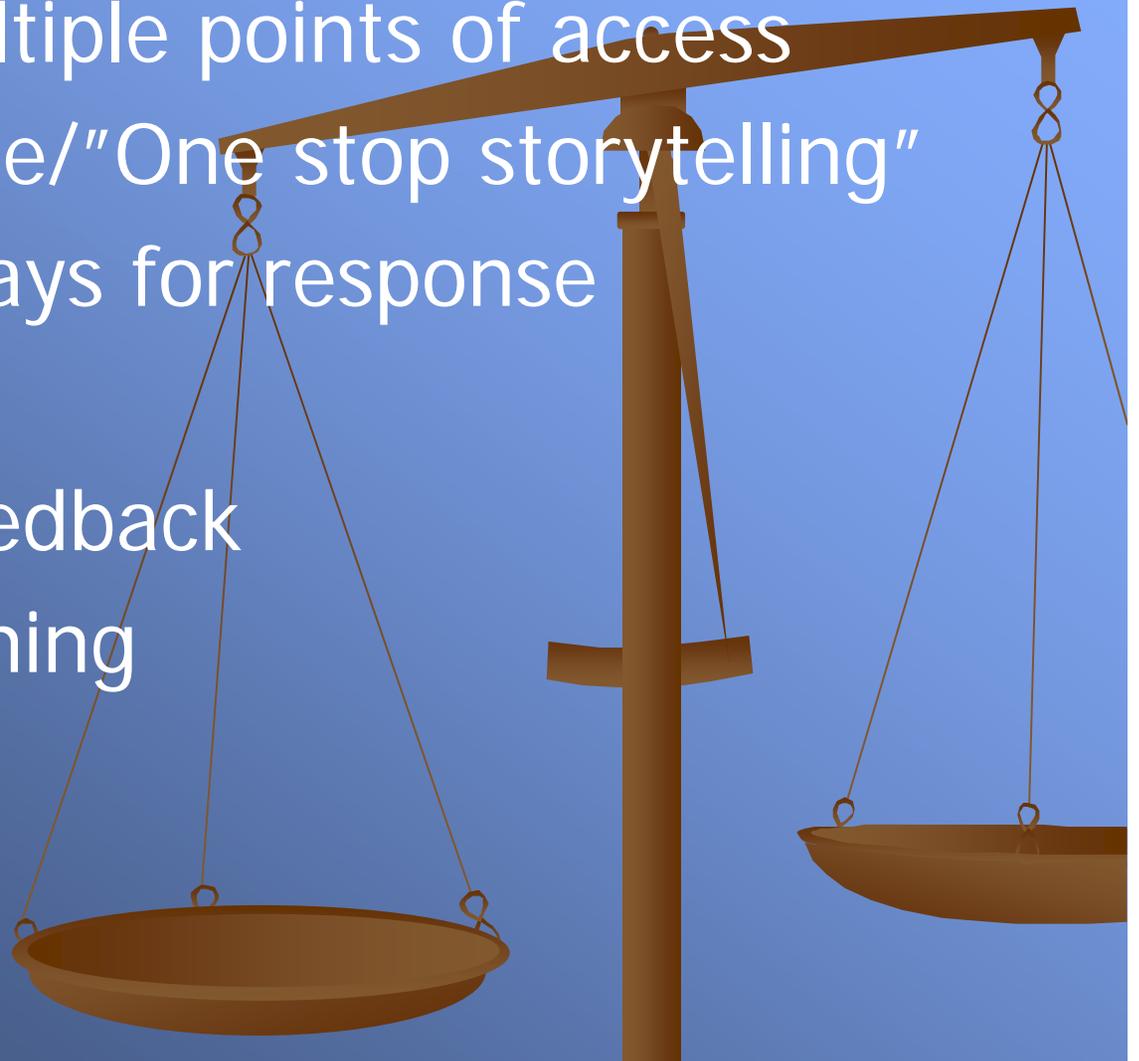
# Step 1 – Effective Intake

- Effective Intake Systems include ...
  - Community presence where the clients are
  - Centralized telephone-based intake
    - Referred to best pathway in-house
    - Advice Only or Brief Service
    - Referred to Pro Bono
    - VOIP, telephone and Automatic Call Distribution (ACD) options



# Intake & Brief Services, cont'd

- One system/Multiple points of access
- Reduce red tape/"One stop storytelling"
- Multiple pathways for response
- 24/7 presence
- Instant FAQ feedback
- "R&D" data mining



# Intake & Brief Services, cont'd

## ■ Mobile Outreach & Remote Offices

### ■ Access increased through mobile work sites

- Courthouses & Self-Help Centers
- Social Services Dept
- Community Based Organizations

### ■ Mobile IT platforms

- Wireless Notebook PC w/ air cards
- Blackberries, iPhones, et al.
- Mobile Printer/copiers & scanners



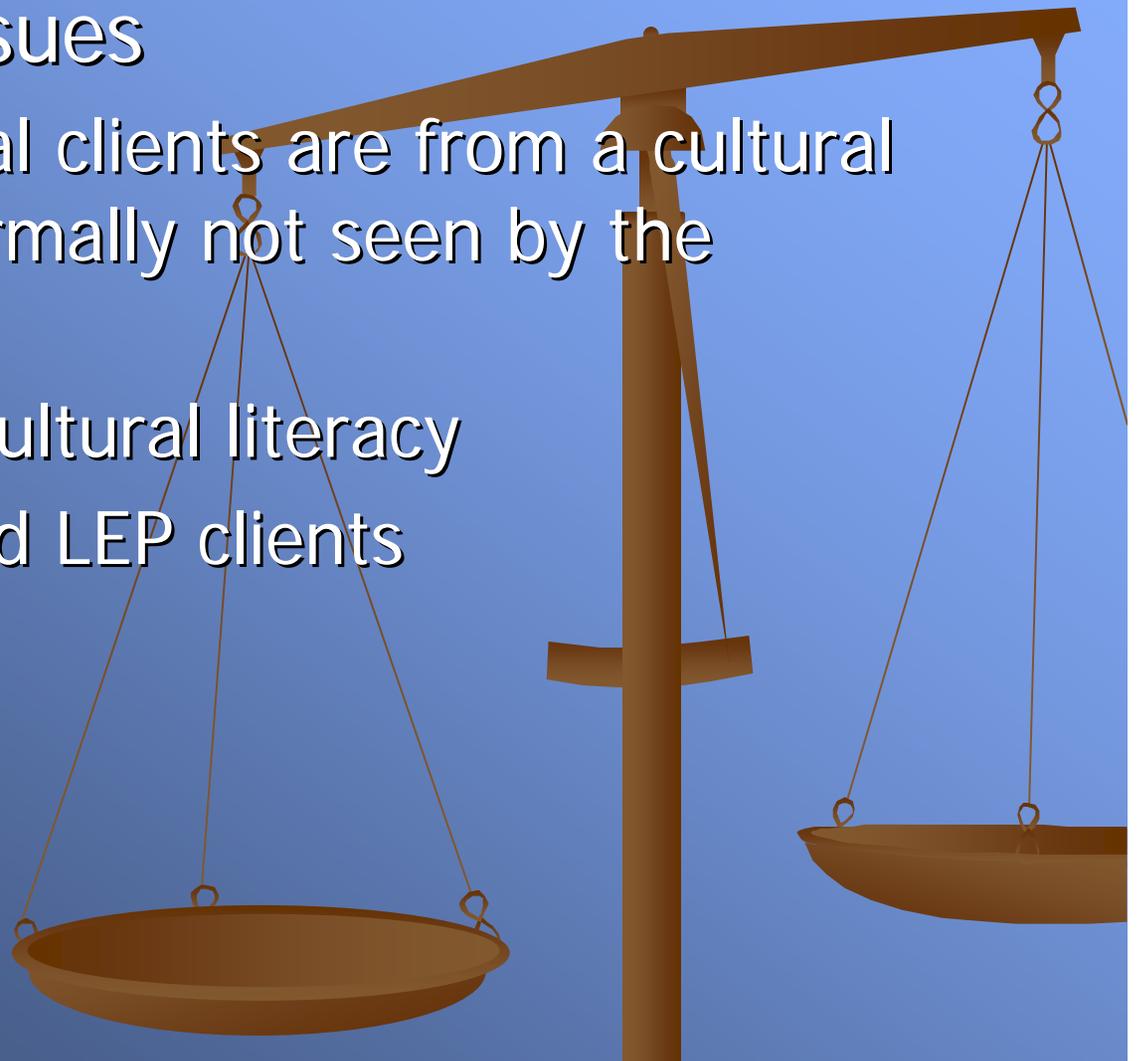
# Online Intake



- Web-based intake
- Ohio example: [www.legalaidline.org](http://www.legalaidline.org)
- Intake done by social agency partners sent directly to the CMS
- Live Chat

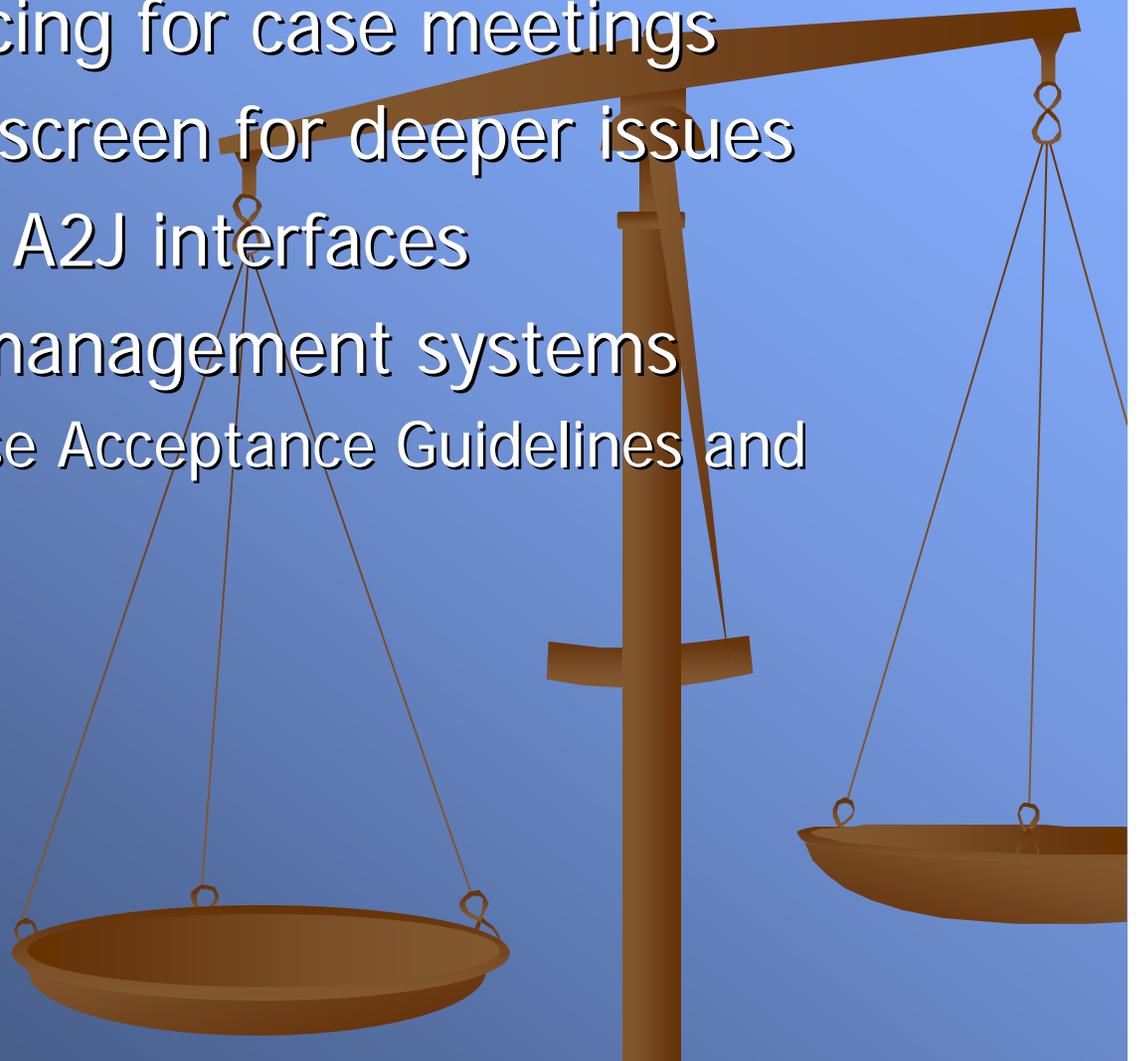
# Intake for Diverse Clients

- Multi-cultural issues
  - What if potential clients are from a cultural background normally not seen by the program?
  - Technology & cultural literacy
  - Multi-lingual and LEP clients



# Case Acceptance

- Video conferencing for case meetings
- Data mining to screen for deeper issues
- Logic trees and A2J interfaces
- Intake & case management systems
  - Developing Case Acceptance Guidelines and Business Rules



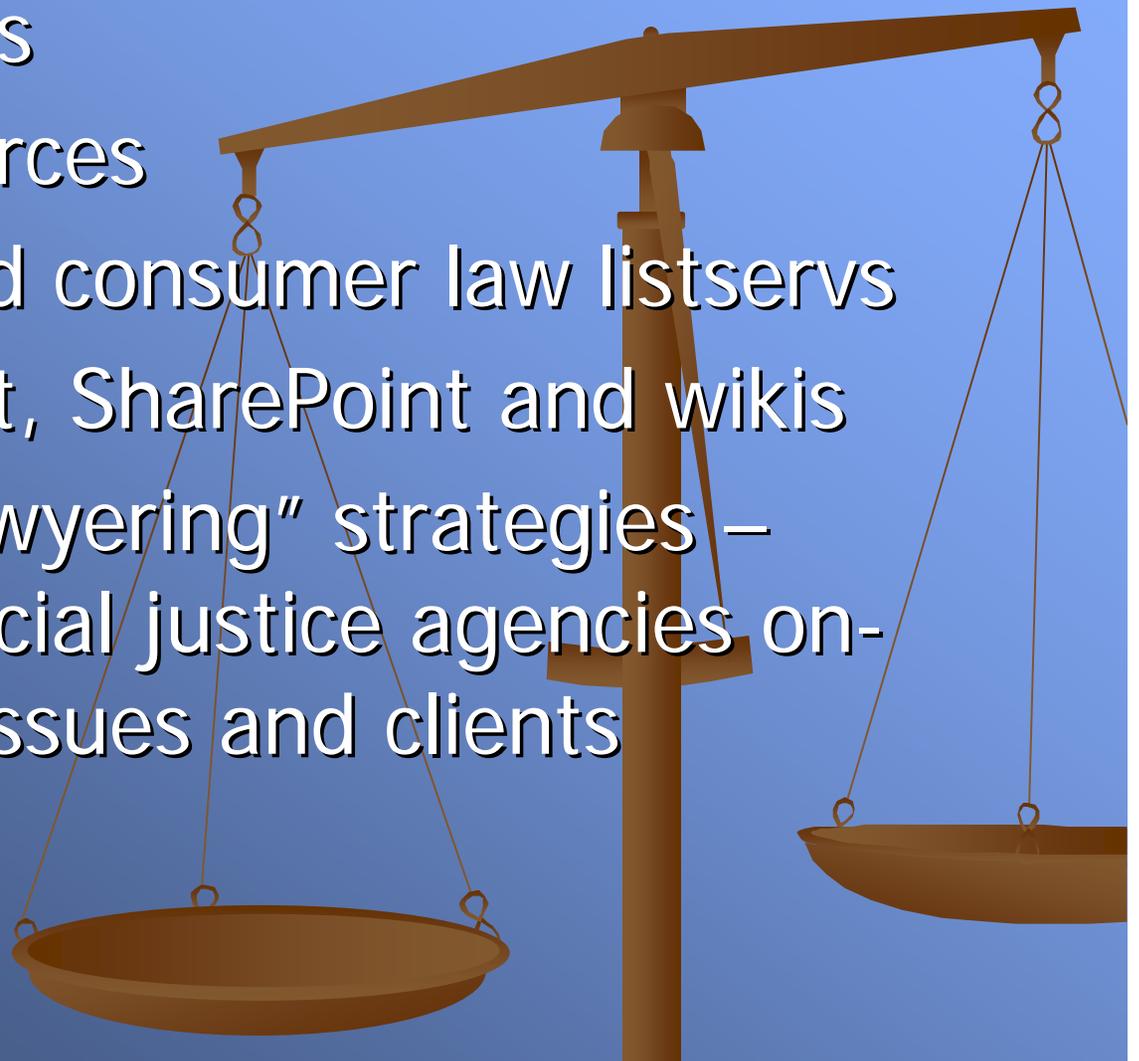
# Developing the Case

- Public web:
  - News media
  - Opposing party web sites
  - Blogosphere
  - Google for lawyers
- Personal search sites re clients and witnesses:
  - Facebook, MySpace, et al.
  - Zabasearch



# Developing the Case

- Expert witnesses
- Academic resources
- Housing law and consumer law listservs
- Internal intranet, SharePoint and wikis
- “Community Lawyering” strategies – connect with social justice agencies on-line to identify issues and clients



# Developing the Case

- Videoconferencing & web conferences
- Regional brief banks
- Document management and other litigation support tools
- Mobile outreach and investigation tools



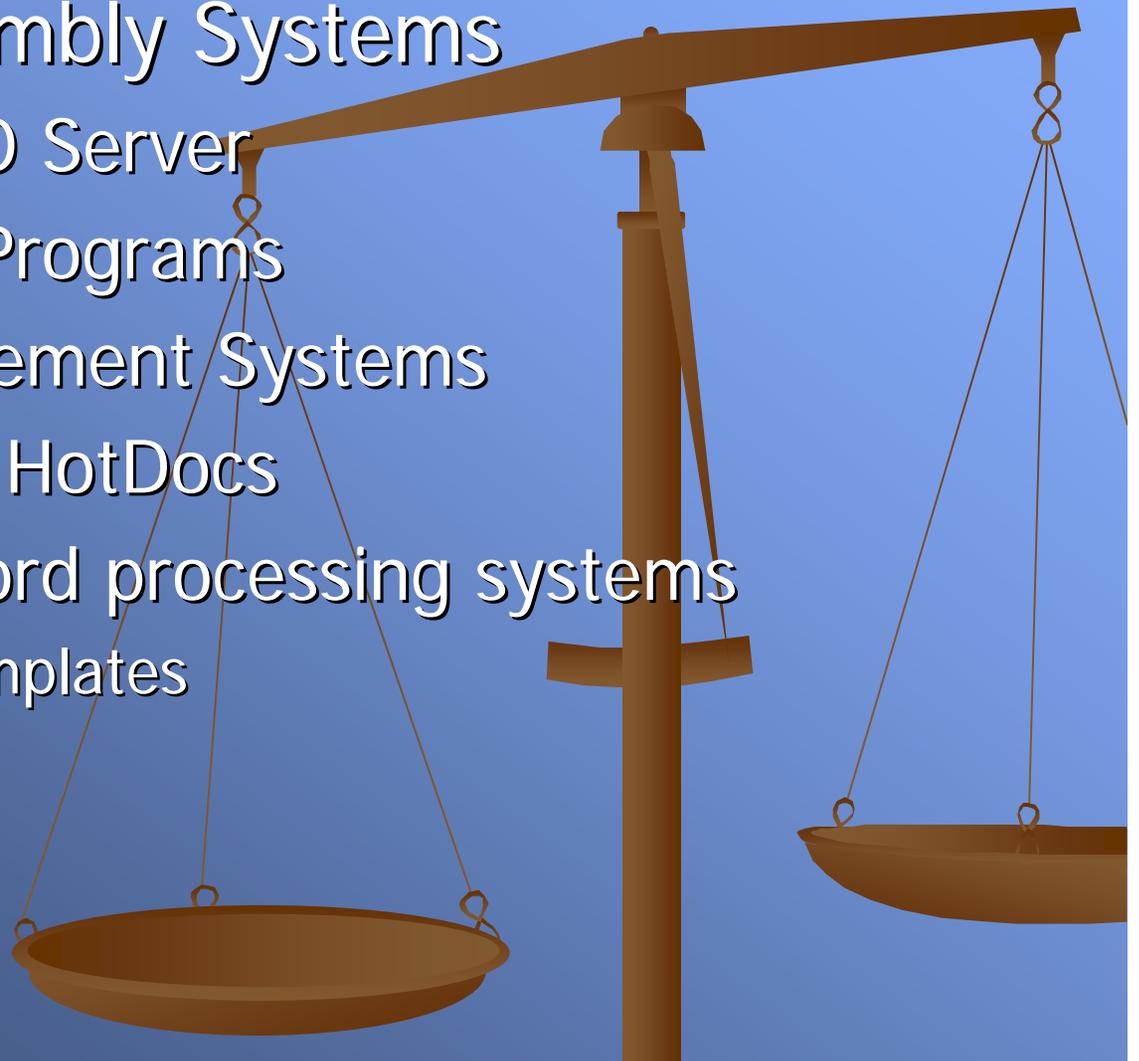
# Developing the Case

- Public Interest Law Firm sites
- RSS Feeds:
  - How do we manage “push” information processes?



# Advocacy Tools

- Document Assembly Systems
  - National NPADO Server
  - Judicial Forms Programs
  - Content Management Systems
  - TIG Projects re HotDocs
  - Pleadings & word processing systems
    - Macros and templates



# Advocacy Tools

- Litigation
  - Collaborative environments:
    - Legal Meetings
    - Basecamp, Central Desktop, Sharepoint
  - Document management
  - E-discovery
  - E-filing



# Advocacy Partnerships

- Mentoring & co-counseling
  - Support from private bar
  - Corporate law departments
  - ABA Litigation Assistance Partnership Project
  - Specialized advocacy organizations
  - Statewide pro bono resources
  - Law School partnerships



# Litigation Management

- Supervision & Professional Development
  - Management based on substantive expertise, not geography
  - On-line training resources
  - High quality litigation training and support
  - Work plans coordinated across multiple offices



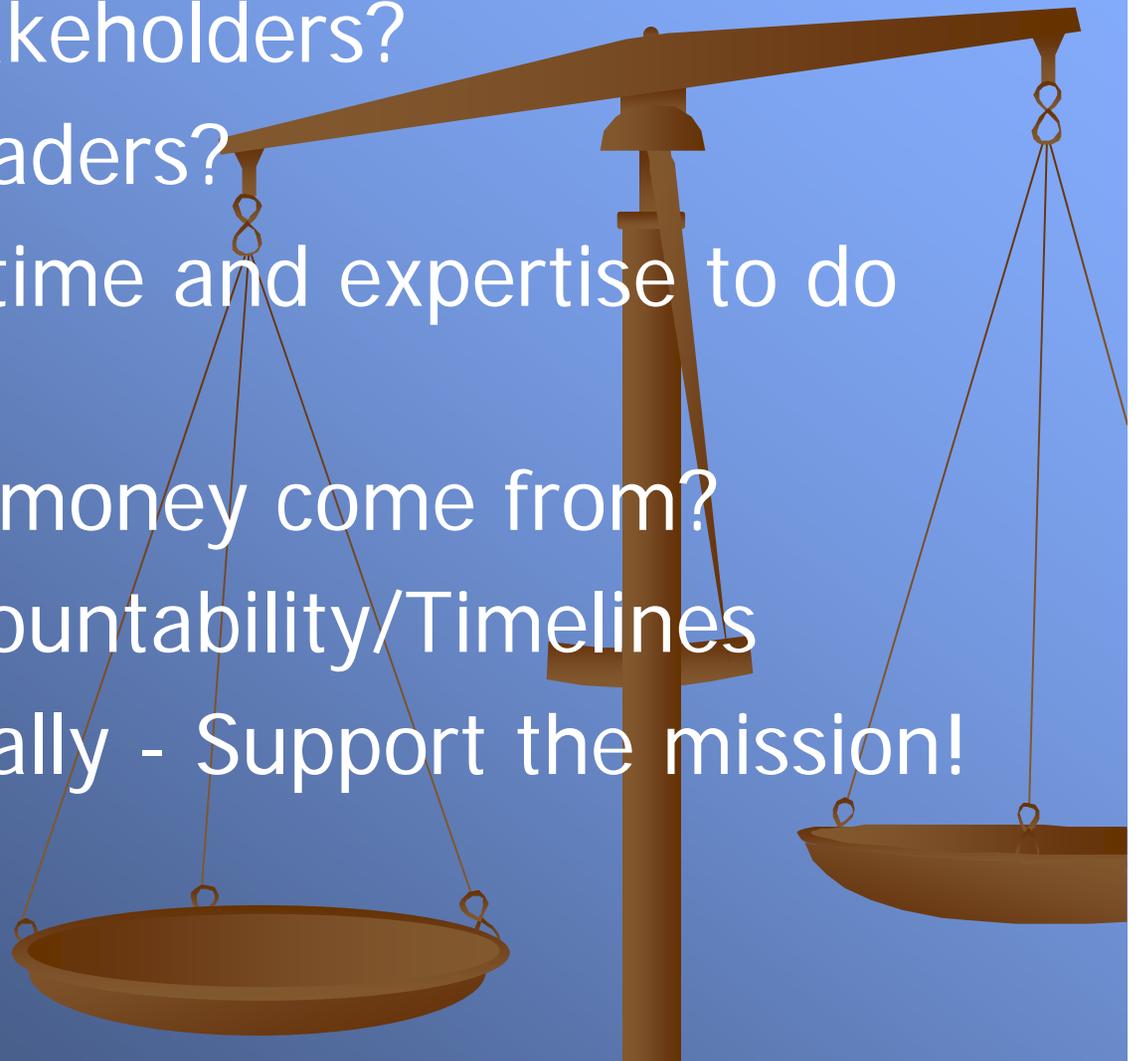
# Trial or Hearing

- Laptop
- Projector
- PowerPoint
- Document camera
- Wireless access
- Document management programs
- Portable printers / wireless faxing
- Email and Instant Messaging access
- Effective graphics



# Technology Leadership

- Who are the stakeholders?
- Who are the leaders?
- Who will have time and expertise to do this?
- Where will the money come from?
- Evaluation/Accountability/Timelines
- Think strategically - Support the mission!



# Thanks!

- Ed Marks

[emarks@lawolaw.org](mailto:emarks@lawolaw.org)

Litigation Director

Legal Aid of Western Ohio, Inc.

[www.lawolaw.org](http://www.lawolaw.org)

