

**LEGAL SERVICES CORPORATION
TECHNOLOGY INITIATIVE GRANT (TIG) PROGRAM
FINAL GRANT REPORT**

Grantee name: Kentucky Legal Aid
Submission date: March 31, 2009
Revised submission: May 5, 2009

TIG Grant number: 06365
Approval date: May 7, 2009

Contact person: Scott Crocker
Email address: scrocker@klaid.org

Phone number: 270.782.1924, X 113

Secondary Contact Person: Rona Roberts
Roberts & Kay, Inc.
Website Project Manager
rona.roberts@gmail.com
859.317.9132

I. Project Goals and Objectives

These are the main goals and objectives as set forth in the approved evaluation plan for TIG 06365:

Objective 1: Improve legal services program advocates' ability to serve and support clients by increasing the ease and efficiency with which these staff advocates can retrieve useful practice information from the advocate library at www.kyjustice.org.

- Build a "Tech Bridge" (changes in programming) between Kemps Prime Case Management and Kentucky's installation of the OST template so that Kentucky advocates have secure, one-click, no password access to legal practice documents stored in the advocate library at www.kyjustice.org.
- Offer short (live) online training sessions to introduce the Tech Bridge to Kentucky's legal services program advocates and encourage them to use it; hold at least four sessions on different days of the week to make wider participation more likely.

Objective 2: Expand the public and private document libraries at www.kyjustice.org by 300 percent, with particular attention to three priority practice areas: Family, Consumer, and Housing.

- Engage law student to conduct a significant advocate library upgrade by reorganizing the advocate library and working with topic leaders (experienced advocates) and relevant task forces to add key practice documents for the three target topics.
- Engage experienced advocates to revise public education documents from www.indianajustice.org for use on www.kyjustice.org.
- Modify Kemps Prime Case Management to give every Kentucky advocate easy, frequent, prompted options to submit completed legal work to the advocate library.

Objective 3: Develop the infrastructure necessary to sustain and secure the online library's quality, usability, and durability as a valued resource for Kentucky advocates.

- Modify and update Kentucky's website Content Management Protocol.
- Re-constitute the Technology Committee and ensure its members include advocates from all programs, leaders from all programs, and Tech Leaders from all programs
- Create and sustain a regular schedule of online meetings for the Technology Committee
- Nurture the fledgling relationships with University of Kentucky College of Law Legal Clinic and University of Kentucky Federal Work Study program (as affordable sources of ongoing skilled workers for the online library)

Objective 4: Improve advocates' ability to serve Spanish-speaking clients, and improve Spanish-speaking clients' access to vital legal education documents in Spanish.

- Translate into Spanish and make available in the public document library at www.kyjustice.org ten public legal education documents most needed when serving Spanish-speaking clients.

Changes that occurred during implementation included the opportunity to add a significant number of improved public documents along with the planned advocate library improvements, and the use of Plain Language (Low Literacy, Fourth Grade reading level) translation as well as Spanish language translation for the ten most significant public documents.

II. Evaluation Data and Methodologies.

Kentucky's programs used multiple methods to assess the results of TIG 06365.

A. Quantitative Approaches

1. **Tech Bridge Tour Participants.** We used the Poverty Law Survey Tool to develop and process results from an anonymous, confidential survey of Online Tech Bridge Tour participants.
 - *Purpose:* To gather useful information on the effectiveness of the Tour, the use of online meetings to deliver it, and ways to improve future promotions of website improvements.
 - *Population:* The 32 people who completed the online Tech Bridge Tour; 50 percent were staff attorneys
 - *Respondents:* 11 respondents (34 percent) of Tour-takers completed the survey, 62.5 percent of them were staff attorneys.
 - *Reminders:* We sent two email reminders soliciting additional responses.
2. **All Legal Services Advocates.** We used the Poverty Law Survey Tool to develop and process results from an anonymous, confidential survey of all Kentucky legal services advocates.
 - *Purpose:* To discover advocates' views on recent website changes, particularly the installation of the Tech Bridge, allowing easy, no-password access to the statewide website's advocate library from Kemps Prime Case Management.

- *Population:* 207 advocates on the state's listserv
- *Respondents:* 30 respondents (14.5 percent) completed the survey.
- *Reminders:* We sent two email reminders soliciting additional responses.

3. **Tech Committee Members.** We used an informal email survey, including open-ended questions, to gather information from Tech Committee members. Members returned the survey to the Tech Committee chair.

- *Purpose:* To learn how Tech Committee members experienced their participation in this work, and how they would like to change and improve it
- *Population:* 27 Tech Committee members
- *Respondents:* 12 members (44 percent)
- *Reminders:* We sent two reminders by email.

B. Qualitative Approaches

1. **Client User In-Depth Face-to-Face Interviews, English- and Spanish-Speaking.** We organized and carried out detailed field tests of new Plain Language public documents.

- *Purpose:* Determine whether new Plain Language documents are useful to clients and easy for them to understand; get suggestions for improving the documents or their presentation on the website
- *Population:* Eligible clients in Kentucky
- *Participants:* Eight Spanish-speaking and eight English-speaking clients
- *Recruitment:* Completed by experienced English-speaking and Spanish-speaking interviewers in Bowling Green, Kentucky

C. Informal Approaches

To be in touch with decision-makers and key collaborators, the project manager for TIG 06365 asked for feedback and suggestions for ongoing improvement during regular email and telephone contact with project directors, the director and manager of the Federal Work Study Program and the University of Kentucky, and the director of the University of Kentucky College of Law Legal Clinic, contractors, and Kentucky's Tech Leaders.

While we had planned to conduct five telephone interviews with advocates to get further information about their use of the Tech Bridge, given the timing of the re-launch of the second Tech Bridge, we did not see the merit in taking advocate time to talk through a tech improvement that is just now in its early stages of promotion, which our survey indicates clearly is not yet in wide use.

III. Summary of Major Accomplishments, Recommendations and Future Steps

TIG 06365 offered Kentucky's four legal services programs the valuable opportunity to take several crucial, positive steps forward on www.kyjustice.org, their shared statewide website.

The grant supported Kentucky's programs in accomplishing these important goals, articulated in the project proposal:

- A. *Make it easy – defined as “one click” access – for Kentucky advocates to search and add documents to a rich, useful, extensive, online statewide document library. Status: Done.*

Kentucky advocates can now reach the protected advocate library in one click, without entering a password, from within their case management programs. The advocate library is a repository of proven practice documents, developed or identified by successful Kentucky advocates, organized for retrieval by other Kentucky advocates. The advocate library serves new and experienced advocates whose use of online documents may make practice either more efficient (time-saving and effort-saving) or more effective (offering tactics and information that improve legal outcomes for clients.)

In the context of the overwhelmingly busy workdays of typical legal services advocates, ease of use determines extent of use of any technology-based tool. Although the complete installation is very recent, advocates affirm the significance of the new, easy access to the advocate library. In surveys conducted after initial training sessions about how to use the new Tech Bridge, 67 percent of advocates said the new linkage helps them be more *effective* in their practice; 67 percent also say the Tech Bridge helps them be more *efficient* in completing their work.

A before-and-after comparison, presented just below, makes it clear why the structural improvement supported by this grant matters to advocates. One important fact frames both the "before" and "after" scenarios: Kemps Prime Case Management is a crucial, "always-on" tool for Kentucky advocates, who use it easily and are familiar with its features on their computers.

Before the Tech Bridge: Prior to the Tech Bridge installation, any advocate who wanted to see whether the statewide advocate library included documents related to a particular case s/he had open within Kemps Prime had to take these steps:

- Leave the familiar Kemps Prime user interface
- Open a browser
- Locate the statewide website URL and point the browser to it
- Locate and enter a valid username and password
- Begin searching for applicable, usable documents, using either "browse" or "search" techniques.

Any advocate who completed a case document or located a resource that could be useful to peer advocates in Kentucky faced an even more daunting set of tasks should s/he decide to place the document within the statewide advocate library so others could benefit. Prior to TIG 06365, the advocate would have been expected to learn the steps for loading a document herself/himself. The interface for doing this baffled even the administrative people who managed the statewide website, and presented insurmountable barriers to any busy advocate with minimal tech skills.

The unsurprising result: Kentucky's advocates rarely ever accessed the statewide advocate library, and never submitted documents to improve the usefulness of its holdings.

After the Tech Bridge: Two important advances occurred in searching and submitting documents to the statewide library. First, Kentucky advocates, working within their familiar Kemps Prime interface, have a new button labeled "Statewide Library" on Kemps Intake Page 2, a location within the structure Kemps presents for every case. That button takes an interested advocate directly – in one click -- to the inside of the protected statewide advocate library, *to the explicit category of documents that match the active case the advocate has open in Kemps Prime*. If s/he wants, the advocate can use "Search" or menu-driven browse functions to move from that initial location through any parts of the advocate library holdings and into other protected parts of the statewide website.

Second, submitting a document has become similarly easy, and similarly based within advocates' familiar Kemps interface. Any Kentucky advocate who has developed or identified a document that may be useful to peers who are handling similar cases can now submit a document by clicking on a "Document Submit" button on Kemps Intake Page 2. No technical expertise at all is needed to send the document to the state website coordinator for loading.

Advocates' embrace of the new Tech Bridge makes sense, given the ways it makes their practice easier and increases the ease with which they can access helpful resources.

Examples of verbatim advocate responses to a survey about the Tech Bridge:

- ...I find the information helpful in areas of the law with which I am not as familiar.
- I have used and really like the easy access from Kemps. I always had trouble remembering the password to get to the advocates section in the past. That was a big headache for me. The easy access button in Kemps is great. (This is from an old dog who has trouble learning new computer tricks.)
- I presently have no concerns about access; the training was useful, and the procedure is simple and painless.

While advocate ease of use and the associated benefits increased significantly, we did not have to compromise security to accomplish these gains. Security of statewide advocate practice documents is preserved by the smart tech work of the contractors for this project. Secure access to the advocate library from within Kemps Prime Case Management is made possible by passing code from the advocate's desktop to the server for the statewide website, verifying that authenticated Kentucky Kemps users may safely be treated as authenticated statewide advocate library users. This grant supported contracts with experts on both ends of the "Tech Bridge" – Ray Agostinelli at Kaivo, for the Python/Zope/server end of the bridge, and John Kemp from Kemps Prime Case Management for the Kemps

end of the bridge – that resulted in production of the code that accomplishes the "handshake" between the two types of programs.

Expanded skills among Kentucky's tech leaders constituted an unanticipated, welcome additional benefit of this phase of TIG 06365. Tech leaders involved with the development and installation of the initial Tech Bridge code learned from that project and used that learning for Kentucky's benefit when unexpected trouble materialized at the statewide website's long-time server/host in Colorado. The website had to be moved to a new platform and server, severing the initial Tech Bridge.

Once Kentucky's website moved to its new Drupal platform, Kentucky's in-state Tech Leaders and website contractors – without using external contractors -- rebuilt the Tech Bridge a second time so it now connects advocates from their desktops to kyjustice.org's new server at May First in Brooklyn, New York. The Tech Leaders then installed the Bridge in the four programs' Kemps Prime Case Management iterations and verified success through testing before advocate training began.

- B. *Make it worthwhile for advocates to contribute to and use the library by tripling the number of available online documents and ensuring their relevance and currency. Status: Done.*

Kentucky expanded its libraries from 184 documents to 656 quality documents, more than tripling our holdings. Advocate library documents grew from 114 to 359; public document numbers increased from 70 to 297. These document additions significantly increase the likelihood that advocates searching the advocate library will find documents that help them improve services to clients. Kentucky is committed to continuing to grow its advocate library holdings. Responding to a survey question about ways to make it more worthwhile to search the statewide advocate library, one advocate said, "The more documents we have and the better their quality, the more likely everyone will start using the [Tech Bridge] link."

Cost savings from lower-than-expected first stage contracting costs made it possible to invest more deeply in public document development than expected. Partial replication – we revised successful public documents initially developed in Indiana -- saved money and boosted quality with excellent cost efficiency.

Funding also extended to allow the translation of Kentucky advocates' top ten documents for clients into Plain Language, or Low Literacy English, moving our documents from average Eighth Grade to average Fourth Grade reading level. We had initially intended only to carry out the Spanish translations, but were able to stretch the project funds because of the welcome contractor cost savings. Following recommendations from LSNTAP, and after checking references and experience, we engaged Transcend Translations of Davis, California, to complete the translation work. Transcend strongly recommended the initial Plain Language translation prior to Spanish translation. In accepting this advice, we benefited from experience and user testing accomplished when Transcend translated documents for low literacy, low income users of the California Court system.

Kentucky's subsequent in-depth, face-to-face tests with English-speaking and Spanish-speaking clients indicate an extraordinarily high level of usefulness and usability for these documents. The newly translated documents won strong support from both English- and Spanish-speaking clients during depth interviews on the new content. Clients in both languages rated the new Plain Language documents 100 percent on usefulness, 96.4 percent on ease of understanding, and 100 percent on the likelihood that they will recommend the site to others. Spanish-speaking clients in particular stated their interest in sharing information about the documents at churches and social action centers so other Spanish speakers can access the documents.

- C. *Develop the sustainable infrastructure of program agreements, technical support, management practices, training, and trouble-shooting necessary to secure the online library's quality, frequent use, and durability as a valued resource for Kentucky advocates. Status: Done.*

Kentucky's programs rebuilt their shared statewide Tech Committee, which now meets online regularly to sustain and improve the statewide library and website. Collaboration on the website has expanded to include collaboration and communication on other tech projects as well. Affordable online meetings and practical decision-making have resulted in stability for a multi-program state's support of its shared online resource.

When surveyed about the Tech Committee's usefulness as a structure to engage advocates, tech leaders, and program leaders in guiding tech decision-making statewide, with particular focus on the statewide website, 90 percent of respondents said the Tech Committee structure works well. Asked whether the Tech Committee meets requirements for regularly scheduled meetings, 97 percent said the present structure and approach work well. The Tech Committee is seen as a solid, inclusive foundation that can yield additional benefits with additional investment. Most important, the Tech Committee vehicle is seen as solid enough to be worthy of that additional investment.

Examples of Tech Committee members' verbatim responses to survey questions about the Committee's effectiveness:

- Since being coordinated by Rona, the tech committee has emerged into a statewide website coordination and development group.
- On-line meetings have been conducted regularly and efficiently.
- I think the Tech Committee does a great job in accomplishing these goals but could grow to be more influential with the advocates participating in content management. This is a tough task, understandably, but that would be my only critique.
- Rona has done a masterful job at trying to engage all types of people in the tech committee. I think we do need to engage more intake people and more advocates but do not know how to accomplish this.

Training that introduced advocates to the new Tech Bridge took place in 30-minute online sessions, offered seven times in early 2009. These trainings will continue at regular intervals, both online and face-to-face; 87.5 percent of respondents to follow-up surveys agreed or strongly agreed that the online "tours" are effective ways to inform them about the new, easy access to the statewide advocate library. Survey respondents offered similar support for the amount and type of information presented during the tour.

Examples of online tour participants' verbatim survey responses:

- I think it's working fine.
- I think the meetings work fine. We probably just need to use the meetings more often.
- I liked the gotomeeting.com. good format, good presentation.
- I think that GoTo Meetings are very effective.

Programs revised the 2003 website management protocol. The revised protocol provides practical guidance for the website and its growth. See Appendix B.

IV. In-Depth Analysis of Accomplishments.

Objective 1: Improve legal services program advocates' ability to serve and support clients by increasing the ease and efficiency with which these staff advocates can retrieve useful practice information from the advocate library at www.kyjustice.org.

Activity 1: Build a "Tech Bridge" (changes in programming) between Kemps Prime Case Management and Kentucky's installation of the OST (Zope) template, so that advocates have secure, one-click, no password access to legal practice documents stored in the advocate library at www.kyjustice.org.

Circumstances required that Kentucky build and install its "Tech Bridge" between the four programs' case management systems and the Advocate Library at www.kyjustice.org two times. The first completion occurred on September 27, 2007, and consisted of completing these tasks, as envisioned in the grant proposal:

- Coordinate between the two contractors whom we had engaged to build the two ends of the Tech Bridge:
 - Ray Agostinelli of Kaivo, whose work was to modify the site's Python code and Zope content management system to respond appropriately to requests for access to the protected Advocate Library from authenticated Kemps Prime users in Kentucky's four legal services programs, and
 - John Kemps, whose work was to develop an enhancement that would allow authenticated Kemps Prime users in Kentucky programs to

- click one button and access the protected Advocate Library at www.kyjustice.org, and
 - click a second button to submit documents to the Advocate library, all without opening a separate browser or entering authentication information beyond what Kemps Prime had already elicited. (This "submit" task is addressed in Objective 2, activity 3; in practice it was completed in tandem with Objective 1, Activity 1.)
- Work with the Tech Leaders in each of Kentucky's four programs to install, test, and share screenshots of the functioning Tech Bridge within that program's iteration of Kemps Prime Case Management.

Virtually as soon as the fourth program completed installation of the Tech Bridge, the Zope/platform supporting www.kyjustice.org began to fail irretrievably. The vital user's search function failed, as did several administrative features related to loading documents and managing the two libraries. Kaivo estimated an upgrade to a newer version of Zope could cost at least \$5,000. Among OST states, only Kentucky's platform showed signs of imminent failure that exceeded a reasonable estimate for repairs. Making the situation worse for Kentucky, at nearly the same time Kaivo's primary OST Zope problem-solver resigned.

Rather than investing in repairing a failed, aged, inadequate platform with few trained "mechanics" available to solve its problems, Kentucky's programs decided to move www.kyjustice.org to a new platform that could add some new features and improve ease of administration. In addition, the programs sought a platform with a large, active user community and a sizable number of technical assistance providers who could help with major site improvements or problems.

Using funds from in-state grants, www.kyjustice.org became the first OST site to move to the Drupal platform, a process that took place over several months between the decision point in December, 2007 and a newly operational site in June, 2008. The Tech Bridge then had to be rebuilt, linking each program's Kemps Prime Case Management to the new Drupal platform underlying www.kyjustice.org.

Fortunately Kentucky's Tech Leaders had learned from the first round, and, over time, created the necessary code changes within each program's Kemps iteration without requiring an outside contractor. In addition, a sub-contractor for the Legal Aid Network of Kentucky worked with Drupal installer/vendor May First to accomplish the server-side changes without undue difficulties.

Tech Leaders completed the final re-installation of the new Tech Bridge on February 16, 2009. As additional states adopt Drupal platforms for their statewide websites, Kentucky's Tech Leaders and website contractors stand ready to share the approach and the code used to make the Tech Bridge with any programs that use both Kemps Prime Case Management and the Drupal platform. Because this specific set of circumstances may not be replicable, we also offer to talk through the approach and the particular issues we addressed with any programs considering a similar "bridge" based on different anchors at either the case management or website platform end.

Training and promotion of the new Tech Bridge is still in its relative infancy (see Activity 2, below). It is going well, but the Tech Bridge has not been completed and promoted for long enough to demonstrate any real impacts yet on advocate use of the statewide library. Even so, we invited all advocates to complete a confidential, anonymous survey about the Tech Bridge and the library improvements. The survey was developed and processed using the Poverty Law Survey Tool, and in addition to a role question, included 11 fixed choice questions about awareness/use of the new website features, and closed with invitations to respond to two open-ended questions about ways to make it easier to use the statewide website and the new Plain Language public documents in English and Spanish that are an outgrowth of TIG 06365.

The results point clearly toward continuing to work to boost awareness, information, and explanation of benefits of the statewide advocate library and other website features. Of the 30 respondents, 68 percent were attorneys. Nearly two thirds of respondents strongly agreed or agreed that they are aware of the ability to access the statewide library easily from within Kemps without entering a password. Slightly fewer (58 percent) strongly agree or agree they can easily locate the button that offers the access, and fewer than half (42 percent) report actually using the button.

Advocates recognize that the easy linkage between Kemps Prime and the statewide library can help them be more effective (68 percent) and more efficient (68 percent) in completing their work, though nearly a third say they need more training before they try to use the Tech Bridge features. Just over half (53 percent) say they are aware of trainings offered regarding the Tech Bridge, and just under half (47.3 percent) say the short online trainings are a good way to reach them.

Activity 2: Offer short (live) online training sessions to introduce the Tech Bridge to Kentucky's legal services program advocates and encourage them to use it; hold at least four sessions on different days of the week to make wider participation more likely.

Once the Tech Bridge was in place, we worked to make advocates aware of it and show them how to use it. So far we have conducted seven online 30-minute "Tech Bridge Tours." We offered the Tour four times in January, 2009, before the Tech Bridge installation was complete in ARDF of KY, Inc., which had unexpected tech issues just before the first tour date. We offered the Tour an additional three times in March, 2009. (More details are included in Appendix A.) We varied days of the week and times of day. To date, 32 Kentucky advocates have completed the Tour, including 18 attorneys, four managing attorneys, a program director, an associate director, and an intake manager.

Overall, advocates responded with appreciation and enthusiasm to the tours themselves, and most reported gaining some useful understanding of the Tech Bridge as a result. Additional Tech Bridge tours will be offered regularly, to reach new staff and offer recurring opportunities for advocates who have not yet taken the Tour. We learned that although we need to offer Tech Bridge Tours regularly, the Tour itself is not enough for all advocates to understand immediately how to begin accessing the statewide Advocate Library from within Kemps. As

one survey respondent noted, we need to encourage legal work supervisors to promote Tech Bridge use in their offices.

See Appendix A for more detail on advocate responses to the online Tech Bridge tours.

Objective 2: Expand the public and private document libraries at www.kyjustice.org by 300 percent, with particular attention to three priority practice areas: Family, Consumer, and Housing.

Activity 1: Engage a law student to conduct a significant advocate library upgrade by reorganizing the advocate library and working with topic leaders (experienced advocates) and relevant task forces to add key practice documents for the three target topics.

With cooperation from Legal Aid of the Bluegrass, the four programs worked with the Federal Work Study Program and with the University of Kentucky College of Law Legal Clinic to engage a bilingual third year law student who had built a website for an immigrant law startup. When the student began work, advocate holdings included 114 documents; he loaded 215 additional documents in the Advocate Library, nearly tripling its holdings. We have since added additional documents, reaching 359 at present, a 215 percent increase. We trust this number can now grow steadily, given the recent launch of the Kemps-based "Document Submit" feature of the Tech Bridge.

We completed the Tech Bridge and its promotion through the online tours too recently to demonstrate any trend or make any real guesses about its use by advocates to submit documents – except we know we must do more online promotion/explanation, in short snippets, offered frequently, with good examples showing benefits to advocates. (See Activity 3, below.)

Activity 2: Engage experienced advocates to revise public education documents from www.indianajustice.org for use on www.kyjustice.org.

Because Kaivo and John Kemp, the initial tech contractors for TIG 06365, required less money than anticipated to deliver their respective contributions to the Tech Bridge, Kentucky's programs asked for and received LSC approval to expand and improve public library holdings with the leftover funds. To use the money wisely, Kentucky's programs chose the path of replication, revising excellent public legal education content developed in Indiana (with the strong support and assent of the leaders at www.indianajustice.org). Six experienced attorney advocates received small fixed price contracts to revise Indiana public website content for Kentucky on these topics: Benefits, Consumer, Elder Law, Family, and Housing. In this way, we boosted our public holdings from 70 to 297, a 324 percent increase.

Activity 3: Modify Kemps Prime Case Management to give every Kentucky advocate easy, frequent, prompted options to submit completed legal work to the advocate library. This activity, in practice, took place in tandem with Objective 1, Activity 1. The Tech Bridge work, in both its first and necessary second iterations, included an approach that allows advocates to submit documents in no more than three clicks from within Kemps Prime without opening a

separate browser or entering a username and password. While this function is in place and has been tested in all four programs, it will require a concerted and sustained effort to persuade advocates to use this feature of the Tech Bridge. Even among advocates who understand the ease of use of the new "Submit to Web" feature, and who know they will not be expected to learn any special code or do any direct work on the website to use the feature, we see reluctance based on a range of factors from diffidence to concern about protection of valuable practice information. This latter point is under focused consideration in the state, as a subcommittee of the state's Tech Committee is at work engaging advocates in idea development around the appropriate protocol governing pro bono allies' access to documents stored in the Advocate Library.

Objective 3: Develop infrastructure necessary to sustain and secure the online library's quality, usability, and durability as a valued resource for Kentucky advocates.

Activity 1: Modify and update Kentucky's website Content Management Protocol. Kentucky's initial protocol, a model framework developed in 2003, assumed substantial staff attorney engagement with the statewide website, including document loading in the Advocate Library. The protocol also envisioned a need for advocates to follow a set of styles that would apply to all documents, making them all similar in appearance.

Kentucky's programs completed a protocol revision in December, 2007. The 2007 protocol, called "Kentucky Website Practical Guidelines," attached as Appendix B, provides guidance about topic areas for major focus, deletes style sections (given that the website pages themselves are governed by style sheets, and attachments in the advocate library need to retain their original styles), and deletes all expectations that staff attorneys should learn to load documents on the statewide website.

A sub-committee of the Tech Committee has completed a more recent revision (March, 2009), updating the topics of greatest focus, clarifying the review process for documents, and pointing toward a document that is now being developed that will guide decision making about *pro bono* attorneys' access to some or all of the Advocate Library at www.kyjustice.org. The updated "Kentucky Website Practical Guidelines" will be presented to the full Tech Committee in April.

Activity 2: Reconstitute the state's Technology Committee and ensure its members include advocates from all programs, leaders from all programs, and Tech Leaders from all programs

At the 2006 Statewide Conference and by email follow-up, all employees of Kentucky's four legal services programs received invitations to join the Tech Committee. The resulting array of members meets the intentions set out in TIG 06365 and serves our purposes well:

ARDF of KY, Inc.

Darlene Conley - Database Administrator
Diane Fish - Administrative Assistant
Marilyn Neumann - Directing Attorney
Addison Parker - Litigation Director

(Tech Leadership currently provided by Brian Miller, LABG, and Phillip Johnson, KLA)

Kentucky Legal Aid

Cheryl Cureton - Managing Attorney, Owensboro
Catherine Noe Fuller - Staff Attorney
Phillip Johnson – Tech Leader
Stuart Warren - Associate Directory
Norm Wheeler - Intake Manager

Legal Aid of the Bluegrass

Brenda Combs, Business Director, Chair of Tech Committee
Glenda Harrison - Advocacy Directory
Brian Miller – Tech Leader
Dianna Reynolds - Special Assistant
Susan Watts - Intake Attorney

Legal Aid Society

Stefanie Coomes – Tech Leader
Ron Marstin - Brief Services Managing Attorney
Nellie McCall - Staff Attorney
Marc Theriault - Staff Attorney

Project Directors (all)

Jeff Been - Executive Director
Scott Crocker - Executive Director
Dick Cullison- Executive Director
Cynthia Elliott- Executive Director

Access to Justice Foundation, KY

Nan Hanley - Interim Director and Training Coordinator
Jackie Duncan - Pro Bono Director

Kentucky Equal Justice Center

Cori Hash - Maxwell Street Legal Clinic Director
Rich Seckel - Executive Director

Contractors

Elizabeth Kissack - Contracted Statewide Website Developer
Rona Roberts - State Tech Coordinator

Activity 3: Create and sustain a regular schedule of online meetings for the Technology Committee

Prior to the 2006 statewide conference, the state's Technology Committee had met primarily face-to-face, usually no more than twice a year, supplemented by occasional conference calls.

As part of TIG 06365, we initiated a calendar of regular, bi-monthly meetings, with schedules set a year in advance to help members schedule around them. The meetings took place by scheduled telephone conference call until April, 2007, when the Committee began using the GoToMeeting tool to support the calls. This simple structure of regularly scheduled, planned, structured meetings for Tech Committee members has yielded far more than expected.

In a survey submitted to the Tech Committee chair, with 12 members responding, members responded to three questions, with an invitation to add comments as they wished. When asked "To what extent does the Tech Committee accomplish the purpose of including advocates, Tech Leaders, and program leaders from all programs in guiding and supporting www.kyjustice.org?" responses averaged 6.3 out of 7, with 7 being the most positive response ("Works Well"), in effect a 90 percent positive rating. When asked, "To what extent does the Tech Committee meet the requirement that it meet regularly in scheduled online meetings?" responses averaged 6.8 out of 7, a 97 percent positive rating.

Full results from the survey are included as Appendix C. Extending beyond the survey, observation of the results and side benefits of the bi-monthly meetings of the Tech Committee suggests the meetings offer a welcome forum for collaboration across program boundaries for common good. The programs' Tech Leaders seem to have woven together a cooperative working relationship, in part due to the foundation the regular Tech Committee meetings provide. In addition, programs' Tech Committee members have used the Tech Committee framework to communicate about Tech plans and issues that are not limited to the statewide website. Examples include working together on ways to automate some grant reporting, learning from each other about VOIP and telephony options, and talking through tech needs before developing TIG Letters of Intent.

Activity 4: Nurture the fledgling relationships with University of Kentucky College of Law Legal Clinic and University of Kentucky Federal Work Study program (as affordable sources of ongoing skilled workers for the online library)

The Federal Work Study Program, University of Kentucky College of Law Legal Clinic and programs all reported benefits from the first use of a law student to improve content at www.kyjustice.org.

- Responding to an email query, the director of the Work Study program said, "It is terrific to place a student in such a great job."
- The director of the UK Legal Clinic stated in a phone interview, "These placements are good for our students."

We have laid a solid, positive foundation for more engagement of this type, and have learned it can be both cost-efficient and effective. We expect to use this approach frequently in the future.

First we must resolve an additional puzzle, and develop a successful structure of Topic Leaders in the state. The law student's engagement revealed a need for programs to invent ways to make it possible for individual experienced attorneys in the state to serve all four programs as topic leaders for www.kyjustice.org. While experienced advocates had agreed to play the topic

leader role, in practice the law student discovered that the designated topic leaders had little or no time to organize material for the law student to load on the website. Programs have since developed some incentives that help address this situation, and we are just launching a new initiative to identify and offer modest compensation to Topic Leaders in five areas, but the incentives came after the time of the law student's engagement with the project. If the new incentives and structure succeed as we hope, future law students working on the statewide website's content will work with clearly designated Topic Leaders to improve content in one or more key areas of legal services law.

Objective 4: Improve advocates' ability to serve Spanish-speaking clients, and improve Spanish-speaking clients' access to vital legal education documents in Spanish.

Activity 1: Translate into Spanish and make available in the public document library at www.kyjustice.org ten public legal education documents most needed when serving Spanish-speaking clients.

Once www.kyjustice.com had been firmly settled onto the Drupal platform, the Tech Committee asked the community of legal services advocates in Kentucky to choose the top 10 public documents for translation into Spanish. The documents offered to advocates for their rating by importance had all been developed by the 2007 summer contractors, who had used Indiana's public documents as a starting point. We asked advocates to choose the documents that would be most useful to them if translated for low literacy readers of English as well as Spanish readers and speakers. While researching effective translation approaches, Kentucky's programs learned, through LSNTAP, about Transcend Translations in Irvine, California. Transcend had translated a substantial number of documents for the California courts. Transcend advocated strongly that we translate each document first into Plain Language – about a fourth grade reading level for English speakers – and then translate the Plain Language text into Spanish.

The Tech Committee chose this approach. Our community of advocates chose 20 top documents, and we had enough TIG 06365 funds for translation to translate 11 documents, which have since been rearranged considerably into a different configuration. A legal reviewer (an experienced advocate) examined both the documents being sent to Transcend Translations and the draft Plain Language documents for legal accuracy.

The documents include the main public website pages on these topics, which are now presented in Plain Language/English, and in Spanish:

- Divorce
- Child Custody
- Child Support for Non-citizens
- General Information about Child Support
- Visitation
- General Information about Domestic Violence
- KTAP and Domestic Violence
- General Information about A Domestic Violence Order

- How to Get and Enforce a Domestic Violence Order
- What to Do If Your Landlord Tries To Evict You (Non-Uniform Residential Landlord Tenant Act jurisdictions)

After Plain Language translations, these documents, taken together, included about 23,000 words.

The four programs commissioned former Tech Committee Co-Chair and retired IT specialist Angela Campbell to set up and manage field tests of the English and Spanish documents in face-to-face interviews with eight English speaking clients and eight Spanish speaking clients. Kentucky Legal Aid's bilingual Intake Specialist, Maria White, conducted the Spanish interviews, each of which lasted an hour. English interviews also engaged clients for a sustained period of detailed reading and feedback on the Plain Language approach to the newly refurbished, reloaded documents.

We learned that, for the most part, both the Plain Language and Spanish translations succeed wonderfully with our target audience. Using a scale in which 7 was the highest positive rating, clients in both languages rated the new Plain Language documents 7 out of 7 on usefulness, in effect a 100 percent rating. In addition, clients assigned the website an average 6.75 out of 7 on ease of understanding, a 96.4 percent rating, and all 16 clients (100 percent) gave the highest possible response (7 out of 7) to a question about the likelihood that they will recommend the site to others. Spanish-speaking clients gave detailed suggestions for specific language changes, particularly with two usage instances on which there was significant convergence. All comments have been incorporated into the Spanish website documents. English-speaking clients made suggestions about additional topics they would like to see addressed, or a few areas where language can be clarified. These suggestions will be handled by the state's newly chosen Topic Leaders in the relevant topics, and the website team will assist as needed with the small revisions proposed for the new documents.

Both Spanish- and English-speaking clients stressed their sense of the usefulness and approachability of the new Plain Language documents. Spanish-speaking clients in particular stated their interest in sharing information about the documents at churches and social action centers so other Spanish speakers can access the documents.

The field tests marked the second time the Legal Aid Network of Kentucky has conducted in-person interviews in Bowling Green, Kentucky, aimed at improving the statewide website. Bowling Green is somewhat centrally located for the state, and has a large Spanish-speaking community (as well as Bosnians and other recent immigrants). In addition, personnel at Kentucky Legal Aid steadily support the purposes of the statewide website, and work hard at the somewhat challenging task of recruiting clients and interviewing them. That commitment and experience showed in the success of this field test. Transcend Translations reported that the Spanish language field tests Angela Campbell and Maria White conducted were the most thorough and the most productive of any they had encountered.

These thorough field tests give us confidence in the usability, approachability, appeal, and effectiveness of our newly translated "Top Ten" Plain Language and Spanish Language

documents. We hope to expand the documents that have had these vital translations – and more important, we intend for the new system of Topic Leaders, coupled with effective translation and effective web maintenance, to sustain a steady approach to updating and accuracy for the important documents in this Plain Language group.

IV.a. Information for Multiyear or Multiple Projects.

This section does not apply to TIG 06365.

V. Factors affecting project accomplishments and strategies implemented to address major challenges

Significant *challenges* this project confronted, with *strategies* we adopted:

Challenge 1: Platform failure. Completion of the Tech Bridge happened fairly quickly, but then the platform (Python/Zope, the OST template) supporting Kentucky's statewide website began to fail in ways that could not be repaired, including system failures that prevented users from searching the website effectively and prevented administrators from loading library documents. We had a Tech Bridge, but it quickly turned into a Bridge to Nowhere when Kentucky's Zope site failed.

Strategy: Build the Tech Bridge again on a new platform. Kentucky's Tech Leaders had learned from the external contractors who built the Zope-Kemps Tech Bridge. At the end of the long process of carrying out a low-budget migration from Zope to a new Drupal platform, Kentucky's Tech Leaders reconnected the Tech Bridge from Kemps to the new Drupal platform on a new server, without outside assistance.

Challenge 2: Too few public documents on key legal services topics. Going into TIG 06365 implementation, Kentucky's public document library contained 70 documents, well-written but not reviewed since 2003.

Strategy: With funds not needed from the initial Tech Bridge contractors – who discovered an unexpectedly simple way to manage the "Document Submit" feature once work began – and with permission from LSC, Kentucky programs dedicated \$10,800 to six contracts with Kentucky advocates who were recognized experts in six areas of legal services practice. Using replication as an additional cost-saving measure, and with permission and assistance from the Indiana statewide website manager, these advocates adapted well-written Indiana public documents in key practice areas. The result is a basic public document library that serves Kentucky's clients well.

Challenge 3: Opportunity to "translate" top 10 public documents into Plain Language (Low Literacy English at about the Fourth Grade level), in a tight time frame, with no legal review mechanism in place.

Strategy: Programs again turned to experienced advocates in the state to offer and

award a very small fixed price contract (\$1000) to an attorney from the top tier of experienced attorneys the state. The contractor provided legal review of the Plain Language versions of the top ten public documents with minimal turnaround times.

Challenge 4: Many Kentucky advocates – particularly the older, more experienced, less tech-savvy advocates – do not have habits of turning to the statewide website to improve their own practice or their services to clients.

Strategy: Make tech improvements work from the advocates' point of view, and make information about the improvements accessible, frequent, and friendly. We are beginning to hear from advocates that our approach, though fledgling, will work if we sustain it. When we used the anonymous advocate survey to ask an open-ended question about ways to increase advocates' Tech Bridge use, several responses suggested we are on a workable track. Here are four statements in advocates' own words:

- Once I start using it more frequently, then I'll become adept - and will turn to that first.
- I presently have no concerns about access; the traing was useful, and the procedure is simple and painless.
- I use it now. Thanks for putting these training sessions together.
- Maybe a reminder that it is there until I get used to using it.

Significant enhancing factors

Enhancing Factor 1: Shared Case Management Programs across four separate programs. In the years before writing the TIG 06365 project proposal, Kentucky's Tech Committee had worked across program lines to secure decisions by all four programs to use the same case management program, Kemps Prime. Even though programs' installations of Kemps Prime are not identical, due to necessary enhancements, the shared foundation of the case management system made the Tech Bridge possible.

Enhancing Factor 2: Cost savings on external consultants dedicated to website development. As explained above, TIG 06365 supported an even greater expansion of Kentucky's statewide website than anticipated in the original proposal. This amounts to a win for clients at no cost to the Tech Bridge for advocates. Both the number of public documents added and the addition of carefully tested Plain Language English and Spanish language versions of the top ten public documents were made easier due to this cost savings.

VI. Major lessons and recommendations

A. Important lessons learned from TIG 06365

Lesson 1: Under good conditions, advocates will adopt and benefit from tech improvements.

From early responses to the Tech Bridge, technology that increases efficiency or improves effectiveness can appeal to advocates. The following conditions are making a difference in

Kentucky advocates' willingness to begin using the new Tech Bridge made possible by this grant:

- The investment required to learn new habits is minimal.
- Information about tech changes is presented repeatedly and available readily.
- Information about the tech changes comes in a small "container" and in the right "byte" size.

Lesson 2: In a multi-program state with one shared statewide website, the pace of progress is governed by the extent of collaboration as well as by the resources available.

Collaboration among program directors, Tech Leaders, advocacy directors, experienced advocates, and intake managers of each program sometimes can produce forward motion even when resources are particularly limited. When collaboration lags, progress can slow or stop. The most significant collaborations in Kentucky have been among project directors and among Tech Leaders.

Lesson 3: Online collaboration makes sense to advocates.

With limited resources and Committee member time borrowed from work directly on clients' legal problems, only online meetings seemed possible when we committed to rebuilding a steady Tech Committee presence in Kentucky. As a beneficial side effect of building the bi-monthly Tech Committee online meeting habit, others in the state now use GoToMeeting to accomplish good work. Tech Leaders rely on GoToMeeting to help each other troubleshoot and plan improvements, and they use it to solve problems with their individual users. Advocates who have taken part in Tech Committee work online have spread the word, and GoToMeeting is now under consideration for other types of work, such as statewide Task Force meetings. All of these online meetings save time and travel costs in our long, not easily traveled state.

B. Recommendations for other programs

This applies to multi-program states: Foster communication among Tech Leaders. When Tech Leaders communicate, their natural focus is problem-solving and efficiency. They will find and invent ways to save advocate energy and save program resources.

C. Recommendations for further development of similar technologies or initiatives

We find it important to build on what works for advocates. Kentucky's advocates have learned their case management software and are comfortable within it. Building statewide library access into their case management software made perfect sense in terms of advocate appeal and avoidance of frustration, since the advocates view their case management software tools as technology that works.

Going beyond the Tech Bridge, Kentucky intends to add additional time-saving, effectiveness-enhancing improvements to Kemps for its advocates. For example, one Tech Leader has built easy access to his program's intranet from within Kemps, and plans to share this time-saving

tool with the other programs' Tech Leaders as well. Two Tech Leaders and a website contractor have envisioned and nearly completed the programming required to automate a daily update of all four programs' staff contact data for presentation on the protected side of the statewide website, accessible in one click from within Kemps. When Tech Leaders talk with each other and with advocates, time-saving and effort-saving solutions are likely to result.

Appendix A: Information about the Tech Bridge Online Tours

PLEASE NOTE: The PowerPoint presentation used in the Online Tours may be viewed online at www.kyjustice.org/bridgetour.

Participant Total: 32

Participation Information	Number Participating
Participants by date:	
Monday, January 12, 2 PM EST/1 PM CST	7
Tuesday, January 13, 1:30 PM EST/12:30 PM CST	5
Wednesday, January 14, 2 PM EST/1 PM CST	0
AND	4
Wednesday, January 14, 4 PM EST/3 PM CST	7
Tuesday, March 3, 2 PM ET/ 1 PM CT	6
Wednesday, March 4, 11 AM ET/ 10 AM CT	3
Thursday, March 5, 4 PM ET/ 3 PM CT	
<i>Participants by program</i>	
Access to Justice Foundation	2
ARDF	12
Contractor	1
Kentucky Legal Aid	4
Legal Aid of the Bluegrass	8
Legal Aid Society	5
<i>Participants by role</i>	
Associate Director	1
Attorney	18
Contractor	1
Employee Benefits Specialist	1
Intake Manager	1
IT Director	1
Law Clerk	1
Managing Attorney	4
Paralegal	1
Program Director	1
Unknown: 2 (participating at shared screen in conference room; position not identified)	2

Appendix A, continued

Results of Anonymous Survey of Advocates Views of the Online Tour of the Tech Bridge www.kyjustice.org

Using the Poverty Law Survey Tool, advocates completing the Tech Bridge tour online received invitations to complete a short anonymous, confidential survey. In addition to role identification, the survey included nine multiple choice questions and two open response questions.

Of the 32 tour participants, 11 (34 percent) completed the survey. Of those who completed the survey, five (62.5 percent) were attorneys, mirroring attorneys' portion of the population of advocates who took the online tour (18 of 32 participants were attorneys, or 56.25 percent.)

The responses indicate that the online tour is an effective way to introduce the Tech Bridge

- 75 percent of respondents strongly agree that the online Tech Bridge tour worked as a way to inform them about easy to the statewide advocate library.
- 75 percent of respondents strongly agree that the online Tech Bridge tour offered the right amount of information for a first introduction.

In response to an open-ended question about improving the ways the website managers communicate about improvements on the site, one respondent said:

I don't have any suggestions for improvement. I thought the online tour was pretty effective.

On the other hand, responses suggest the Tech Bridge tour, by itself does not adequately teach all participants to use the new buttons that tie Kemps Prime Case Management directly to the statewide advocate library.

- 37.5 percent of respondents disagreed or were neutral in response to the statement, "I know how to use the advocate library buttons within Kemps."
- 50 percent of respondents agreed or were neutral in response to the statement, "I need more training to learn how to access the statewide advocate library from within Kemps."

In response to an open-ended question about improving the ways the website managers communicate about improvements on the site, one respondent said:

I think we still need to provide additional training to staff who did not participate in the online meeting. Legal work supervisors need to review and encourage advocates to regularly submit information. We also need a mechanism for advocates to note erroneous content and a mechanism for review and correction.

(Programs' legal management staff and Tech Leaders have already affirmed their interest in encouraging more widespread use of the Tech Bridge and following up the introduction the tour offers.)

Most encouraging about the use of online sessions to help advocates know what is available on Kentucky's statewide website, 100 percent of survey respondents strongly agreed or agreed that they would be willing to join future short online sessions about website improvements that affect their work.

In response to an open-ended question about improving the use of the online meeting tool to get useful information to advocates, respondents affirmed they like the tool [verbatim copies of advocate statements]:

No suggestions. I think it's working fine.

I think the meetings work fine. We probably just need to use the meetings more often.

I liked the gotomeeting.com. good format, good presentation.

I think that GoTo Meetings are very effective.

Appendix B: Kentucky's Practical Website Guidelines

Approved, December, 2006

Practical Guidelines for Managing www.kyjustice.org
2007-2008

A. Purpose: Usable guidance

These guidelines are intended to help Kentucky's Tech Committee and website project manager choose what to post on www.kyjustice.org, and ensure the website's accuracy, timeliness, usefulness, and ease of use.

B. Background: Resource Limits

1. Kentucky has four legal service programs that receive partial funding from the Legal Services Corporation.
2. These programs jointly own and manage www.kyjustice.org.
3. The website has no full-time staff. The Tech Committee, which includes members from each LSC funded program and some allied programs, accomplishes most of its work through email, phone conferences, and online communication. Grants and program contributions fund a contract website project manager who works on the project about 30 percent of full time; other contractors provide certain specialized tech assistance, content development, and language translation.
4. Advocates -- who carry full caseloads in their respective programs -- also provide the site's legal oversight.
5. Tech assistance comes from programs' tech managers, LSC-funded circuit riders, peers and colleagues in sister states, and Kaivo, a Denver-based company that developed the Open Source Template (basic website structure) now used by 21 states.

The bottom line: This rather complex website has no full-time employees. Most who work on it have demanding full-time jobs as legal services advocates or staff, and carry out unpaid web duties in addition. These practical guidelines take the realities of Kentucky's website resources into account.

C. Content Priorities for www.kyjustice.org

Four factors govern these content priorities:

1. The legislative and administrative mandates that apply to Kentucky's legal services programs
2. The legal work priorities each Kentucky program has determined
3. The portion of those priorities that can be most appropriately and usefully addressed in a website to benefit clients, potential clients, advocates, and program allies, including *pro bono* attorneys
4. Feedback from clients and advocates, offered during website evaluations

For 2007-2008, website work will concentrate on these priorities:

Public Side:

For 2007-2008, website work will concentrate on these priorities:

1. Offering sound, accurate, current, basic overview documents, written for maximum readability and usability, in these three areas of legal services practice:
 - a. Family
 - b. Housing
 - c. Consumer
2. Offering key documents in Spanish as well as English
3. Adding key self-help documents as feasible, within the requirements of the courts, with careful attention to ease of use

If resources are available, further work on basic community-oriented legal overviews will be completed within these areas:

- Health and Medical Matters
- Jobs/Employment
- Non Citizens
- Our Legal System
- Public Benefits/Government Programs
- Seniors
- Students
- Your Money and You

Resource constraints, coupled with the cross-state cooperation, make it practical to build on excellent work that is already completed in other states. Indiana's state website, www.indianajustice.org, features carefully developed public material in key topic areas, and will serve as a key resource for developing new and revised public content for kyjustice.org.

Advocate Side:

Kyjustic.org currently offers advocate content in these areas:

- Attorneys/Legal Services
- Bankruptcy
- Civil Procedure/Administrative Law
- Civil Rights
- Consumer
- Disability
- Economic Development
- Education
- Employment

- Evidence
- Family Law
- Guardianship/Conservatorship
- Health
- Housing
- Immigration
- Juveniles
- Mental Health
- Migrants
- Other
- Public Utilities/Energy
- Senior Citizens
- Social Security
- Torts
- Unemployment Compensation/Insurance
- Wills/Estates

For 2007-2008, website work will concentrate on these priorities:

1. Review all current documents; remove or update the outdated ones.
2. Institute the tickle system to guide ongoing, regular content reviews.
3. Bolster content in areas determined by the December 2006 advocate survey (now in process.)

D. Responsibilities

Web Project Manager

The web project manager has a variety of duties related to the website. These are the ones that involve content management:

1. Working with the Tech Committee, organize and manage a workable system for getting useful, sound, current information from others onto both sides of the website
2. Where feasible, help with editing or writing to increase usability and usefulness of public site material
3. Load completed documents and pages, or manage the work of others who load documents and pages as volunteers or contractors
4. Alert topic owners and contributors to content issues that users identify when using the site
5. To the extent possible, support and staff the work of the Tech Committee, topic owners, and contributors

Topic Owners

Topic owners are individuals or small teams of content experts who take specific responsibilities for the accuracy and completeness of legal information on the public side and useful documents on the advocate side of the website.

1. Carry out or manage a process for determining, within a specific legal area, what content should be included on the public and private sides of the website.
2. Advise the Tech Committee and web project manager about ways to acquire the needed content.
3. Review or guide a review of existing content and decide whether it should be kept, updated, or deleted.
4. For a specific legal area, help members of the Tech Committee understand the content management status

Contributors

Working with topic owners or the web project manager, contributors develop high quality, appropriate content for the website.

1. Share content that is already developed with topic owners or the web project manager for possible inclusion on the site.
2. In certain cases, adapt content that has been developed for other purposes or audiences, making it appropriate and accurate for inclusion on kyjustice.org.
3. In certain cases, with guidance from a topic owner or the web project manager, develop content for kyjustice.org from scratch.

E. Content Review

Topic owners and members of the Tech Committee will review content for legal accuracy, currency, usefulness and appropriateness for the public side, private side, or both. Carefully chosen contractors may also help with these tasks.

The web project manager, members of the Tech Committee, and carefully chosen contractors will review content for readability, accessibility, and usefulness.

The web project manager also tracks and manages the regular review of documents to ensure they do not lose their currency, and reports to topic owners and the Tech Committee on any insights gained from user testing and user feedback.

Appendix C: Results of Survey of Technology Committee Members
www.kyjustice.org

Role in Program	Extent/Accomplish Purpose?	Extent/Meet Mtg. Req.?	Suggestions?
Allied Program Attorney	7	7	
Intake Director	7	7	
Staff Attorney	7 I think the Tech Committee does a great job in accomplishing these goals but could grow to be more influential with the advocates participating in content management. This is a tough task, understandably, but that would be my only critique.	7 I think that Rona and the Tech Committee has done outstanding work in bringing Kentucky's legal service organizations and our clients up to speed with the statewide website. The only thing I think needs a change (and it needs a change badly) is the look of the website. The graphics and presentation of our statewide website belies how great it is and that should be rectified, in my opinion.	
Tech Leader	6	6	
Program Director	6 Since being coordinated by Rona, the tech committee has emerged into a statewide website coordination and development group.	7 On-line meetings have been conducted regularly and efficiently.	I believe that we will need someone to serve as coordinator of Tech efforts, and to schedule and coordinate tech meetings if these efforts are to continue.
Program Director	6	7	Continue subcommittee involvement and be sure that programs

			take ownership in the process.
Associate Director	7	7	
Business Director	6 Rona has done a masterful job at trying to engage all types of people in the tech committee. I think we do need to engage more intake people and more advocates but do not know how to accomplish this.	7 Very well done	We need to continue to have a person coordinate this work.
Tech Leader	6	6	
Tech Leader	6	7	
KEJC	6 As a non-LSC funded program, we don't always participate but we appreciate getting the info.	7 Appears to be regular and frequent!	Show and tell at trainings or statewide conference. Or perhaps Task Force meetings set up by KEJC. Who could do it?
Managing Attorney	6	7	Maybe we could vary the days and times for the meetings. I seem to have a lot of conflicts on Wednesday mornings. Of course I know that any time you get a large group together you are going to have conflicts so there may not be anything to do about it.
TOTAL: 12 participants Allied Programs: 3	Average 6.3 out of 7 possible	Average 6.8 out of 7 possible	

Associate Director: 1 Attorney 1 Intake Director: 1 Managing Attorney: 1 Program Director: 2 Tech Leader: 3			
--	--	--	--

Appendix C, continued: Additional Information About Tech Committee Functions

This portion of this appendix contains several types of information:

- *Schedule of Tech Committee meetings, past and future*
- *Examples of three agendas from past Tech Committee meetings*
- *Example of one set of meeting notes from a past Tech Committee meeting*

Schedule of Tech Committee Meetings (Past)

December 13, 2006
February 14, 2007
April 11, 2007
June 13, 2007
August 29, 2007
October 10, 2007
December 12, 2007
February 13, 2008
April 9, 2008
August 27, 2009
October 8, 2008
December 10, 2008
February 11, 2009

Schedule of Tech Committee Meetings (Future)

April 10, 2009 (Face-to-Face planning session)
June 10, 2009

Examples of Three Tech Committee meeting agendas:

Agenda for February 14, 2007 telephone meeting:

Welcome and quick hellos from all on the call

Progress report on past TIG initiatives

- * Great support on the advocate survey to finish out the 03 grant
- * A "discovery" about additional evaluation work required on 03
- * Progress on completing work and reporting on the 05 grant

Progress report on TIG 06 (The "Kemps Bridge" project)

- * Have an agreement with Kaivo
- * Kaivo has begun the work they have to do to the site
- * John Kemp has begun the work he has to do to Kemps Prime
- * Next steps: Kaivo conference call(s) (first tech, then tech and advocate)

* UK Legal Clinic has collected resumes for the two law students (summer); reviewing resumes Friday

News about the new HotDocs project at Legal Aid Society: Nellie McCall

Progress report on website updates

* Alternate Text/Standard Text links - still has kinks

* working on loading Grandparent Booklet; still has style issues and other things needed:

http://www.kyjustice.org/Home/PublicWeb/Library/HTML_Documents/gparent_hbook

Quick report on TIG conference (January 07)

New topics?

Agenda for Tech Committee Regular Online Meeting, December 12, 2007

1. Welcome and introductions
2. Update on improvements to www.kyjustice.org

* "Useful Family Law" public page:

http://www.kyjustice.org/Home/PublicWeb/docs/public_family

* New self-help divorce forms and instructions (Jefferson County):

<http://www.kyjustice.org/Home/PublicWeb/SelfHelp/Divorce>

* New (still being refined) online self-help divorce (KOSHA):

<http://www.kyjustice.org/Home/PublicWeb/SelfHelp/OnlineDivorce>

3. Update on platform upgrade for www.kyjustice.org
4. Information about other tech initiatives programs are managing or launching
5. Other opportunities and issues

Agenda for Tech Committee Regular Online Meeting, December 10, 2008

Update on CALSNET

Update on statewide website

>>>Note user access information for the advocate side of [kyjustice.org](http://www.kyjustice.org): (to be shared during meeting)

Update on KOSHA (LAS)

Update on Live Help for Intake (KLA)

Update on tech improvements for domestic violence clients (ARDF)

One example of Tech Committee meeting notes (circulated to members after each meeting, and stored online on our private project management wiki, to which all Tech Committee members belong: <https://legalaidnetworkofky.wikispaces.com>)

Technology Committee Online Meeting Notes, October 10, 2007

Participants:

Brenda Combs, LABG
Stefanie Coomes, LAS
Michael Hubbuch, ARDF
Phillip Johnson, KLA
Ron Marstin, LAS
Brian Miller, LABG
Tia Murphy, ARDF
Rona Roberts, RKI

1. Quick updates

- Website: www.kyjustice.org
 - We have streamlined navigation and created a simpler look on both the public and advocate home pages. Given how few people work on the website, and how few hours they work, it seemed realistic and practical to end the practice of trying to keep current news on both the public and advocate home pages. Similarly, with so few calendar events being submitted, we have begun placing text versions of calendar events on the advocate home page when there are any, and we have removed the “Calendar” navigation button on the public home page.
 - Major document additions continue on both the public and advocate sides. Advocate documents have gone from 114 to 329; many of those documents are in Word format, and these are relatively fast to load in the advocate library. The document additions to the public library are going more slowly because they involve, in many cases, very large, complex HTML documents that have internal and external links, and simply require more time to get right. Even so, public documents have gone from 70 to 199. Check out the new public Divorce document as an example. (To get there from the public home page at www.kyjustice.org, click on “Legal Info,” then “Family Law,” then “Divorce/Separation,” then “Divorce.”) A Spanish language version of this document has been loaded but not yet polished up with useful internal links. Many other family law documents have been loaded or are still being loaded, along with Consumer, Elder, and Public Benefits documents on the public side. On the advocate side, separate pages that describe newly loaded documents in Public Benefits, Housing, Consumer, and Poverty Law Overview are accessible from text links at the top of the advocate home page. Brenda Combs demonstrated the direct link Brian Miller has created from the LABG intranet into the advocate home page. This linkage is an additional, powerful Tech

Bridge that has grown out of the TIG 06 project. Without opening a browser or remembering any additional passwords beyond those required to open their intranet connection, LABG advocates can enter the advocate side to retrieve contact information for staff in any Kentucky legal services office, search the advocate library, or access other components of the site.

- Following a meeting with Jackie Duncan, who will soon launch a new website that makes it easy for volunteer lawyers in Kentucky to find pro bono opportunities, we added the *pro bono* page as a main navigation button on the public home page, while keeping it as a nav button on the advocate home page as well. We are ready and eager to use these pages to help promote the new volunteer lawyer website when it is launched.
 - New questions about improving the website platform
 - The TIG 07 grant proposal submitted by Indiana and Maine, requesting funds for a platform upgrade for all 22 OST sites (including Kentucky) was not funded. The OST community is considering what to do, and we in Kentucky may want to take some action on our own. We are just starting to consider the possibilities; you will hear more about this.
 - LSNTAP is considering a process that will demonstrate the most likely upgrade options to the states using the open source template, followed by a joint decision-making process. This is going to take some time, and not all states are waiting for it to unfold. Ohio has already contracted for an upgrade to a newer OST platform called “Plone.” Michigan built its site in Plone about two years ago.
 - Tech Bridge grant activity
 - The Tech Bridge from Kemps Prime to the statewide online advocate library is complete in all four programs as of September 27. Brian Miller and Stefanie Coomes used GoToMeeting online to complete the installation at LAS.
 - The document additions, as noted above, are proceeding.
 - Rona will conduct several short online orientations to the bridge feature and updated libraries, probably near the end of October and beginning of November. The sessions will be offered on different days and times of day to make it easy for people to find a session that fits for them.
 - One side benefit is that programs are subscribing to GoToMeeting to save money and increase communication options. LAS has subscribed, and LABG is using a trial subscription prior to subscribing.
 - New (2007) TIG grant activity
 - LAS is advertising for a temporary contract attorney for the web-based self-help initiative, and hope to choose the person by the end of November.
 - The TIG 07 conference dates are January 31 – February 2, 2008, in Austin. Rona encourages ARDF and KLA to send an interested staff person, to join the representatives from LABG and LAS whose participation is funded as part of the TIG grant package. This could help strengthen and focus the joint tech work among the four programs.
2. Brian Miller did a live demonstration of the user view of the Tech Bridge as it is installed at Legal Aid of the Bluegrass. Stefanie Coomes said the LAS installation looks virtually

identical to the LABG installation. Phillip Johnson said the KLA installation still needs the “Kentucky Justice Website” or “Kentucky Website” button featured on the other programs’ sites. Tia Murphy asked about the placement of the access button in the ARDF Kemps/Tech Bridge installation, and Rona did not yet have that information.

3. Conversation about issues KY Tech Leaders are addressing and considering addressing jointly
 - o We may need a joint work session after AT&T Excelsior grant decisions are announced; we’ll hold up until we know the results of those four proposals.
 - o George Bailey has proposed joint work among programs on Information Security and Disaster preparation.
 - o Phillip Johnson demonstrated the main features of the programming changes he has made in Kemps to eliminate the requirements for advocates to do double entries on clients in the HUD program [I’m sure there’s a more specific program name but I failed to note it. – RR] Once all the work is fully operational, these programming additions will reduce the burden of both data entry and reporting, while meeting all program requirements. Phillip also briefly demonstrated similar work he has done on SHIP data and reporting. He will put all these changes on the Tech Leaders’ forum website.

Our next meeting: December 12, 2007, 11 AM ET/ 10 AM