

## **2010 TIG CONFERENCE SESSION SCHEDULE**

### **TUESDAY, 1/12/2010**

#### **Registration**

4:00pm-6:00pm (2nd Flr Mezzanine)

### **WEDNESDAY, 1/13/2010**

#### **Registration**

7:30am-5:00pm (2nd Flr Mezzanine)

#### **Breakfast**

7:30am-8:30am (18th Over Austin)

#### **Opening/Welcome**

Wednesday 1/13/2010 8:30am-9:00am (Sabine-Rio)

#### **Generational Approaches to Change and Technology Adaptation (Plenary)**

Wednesday 1/13/2010 9:15am-10:30am (Sabine-Rio)

What are the factors to consider when implementing change, such as generational approaches to change and technology adaptation? How do we develop a framework for facilitating change and integrating change at the individual and organizational levels? In this plenary, we'll identify and dissect technology implementation challenges, discuss facilitating adaptation of change overall, review successful examples of change implementation, and identify tools to facilitate adaptation.

*Presenters: Molly French, Colorado Legal Services, Rachel Medina, LSNTAP*

#### **The Integration Of Timekeeping, Case Management, Accounting Systems – Can They Come Together In Harmony? (Administrator Track)**

Wednesday 1/13/2010 10:45am-12:15pm (Trinity)

What is the best way for your organization to separate costs and provide information that management and the Board need to make informed strategic planning and management decisions? This session begins by covering the steps involved in writing an accounting methodology which defines the accounting process used by the organization to separate costs, meeting audit and regulatory restrictions and achieving the reporting results management requires. This may include grant allocations, allocating costs between entities or functionally within the organization. It concludes by discussing how to use your technology to effectuate your accounting methodology, for example, how you can use technology to marry your timekeeping and case management software to your general ledger.

*Presenters: Angie MacKay, Legal Aid of Greater Cincinnati; Cynthia Vaughn, Ohio Legal Assistance Foundation*

#### **Emerging Trends in Technology (Tech and Lawyer Track)**

Wednesday 1/13/2010 10:45am-12:15pm (Sabine-Rio)

Technology continues to impact the practice of law in a variety of ways. This session will take a look at how programs are using technology not only in terms of delivering information and services but also in how young lawyers practice law. The session will also take a look at what is currently happening in the for profit legal industry in search of ideas and innovations that may benefit the nonprofit community.

*Presenters: Joyce Raby, Consultant; Ron Staudt, Chicago-Kent College of Law*

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### Lunch

Wednesday 1/13/2010 12:15pm-1:45pm Creekside

### Using Technology to Support Program Management (Administrator Track)

Wednesday 1/13/2010 2:00pm-3:30pm (Trinity)

Ever had trouble keeping all of the plates spinning at once? Do you often think – there has to be a better way to do this? This session will help program administrators use technology to better manage the projects and people that are part of everyday life in a legal services program. Included will be an overview of how to effectively use project management software, tools to help with remote supervision of employees, technology tools that address everyday challenges and tricks for using technology more effectively in your daily work life.

*Presenters: Alison Paul, Montana Legal Services Association; Craige Harrison, Utah Legal Services, Kate Bladow, Pro Bono Net*

### Knowledge Management: What it is, why it matters, and (Google) options for making what you know findable (Lawyer Track)

Wednesday 1/13/2010 2:00pm-3:30pm (Sabine)

Still using three-dimensional file cabinets, file folders or (go ahead, admit it) floor piles to organize your work? How do attorneys in your organization share and find documents? How are the advocates in your organization affected by the paradigm shift away from "knowledge" as a hard-copy concept, toward the creation, storage, sharing and "findability" of knowledge as a digital concept? This session will address those questions and suggest answers for legal services organizations that want to get their shared knowledge content in order and make it all easier to find.

*Presenters: Brian Lawlor, Legal Services of Northern California; Ron Staudt, Chicago-Kent College of Law*

### Green Your IT and Reduce Costs through Virtualization (Tech Track)

Wednesday 1/13/2010 2:00pm-3:30pm (Rio)

Come learn what virtualization is and how one statewide legal services program has used it to drastically reduce their administrative costs, save money on computer hardware and effectively green their IT. Get an overview of the vendors and software options available and the different ways to virtualize the IT in your office – including servers, storage, applications and desktops. We'll also explore ROI and what to consider to help decide if virtualization is a good option for your program.

*Presenters: William Guyton, Alabama Legal Services; Chuck Mills, Maryland Legal Aid Bureau*

### Mission-Based Technology Planning (Administrator and Tech Track)

Wednesday 1/13/2010 3:45pm-4:45pm (Sabine-Rio)

Nonprofits have limited resources, which usually means that we have to make tough choices about where to spend our time and money. Here, we cover best practices in planning for technology projects, providing tools to help you make smart decisions about where to invest those resources. From the recently released NTEN book: 'Managing Technology to Meet Your Mission.' This session will include: Top to bottom outline of the nonprofit strategic planning process, incorporating balanced scorecards, multiple bottom lines and focusing on technology planning; Sound advice on how to evaluate which tech projects need to be done the exact same way that a for-profit would and which ones can be done creatively, with a deep dive into what "creatively" means; and Direction as to how to develop of Technology Plan – what goes in it, how

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do you get it in there, how do you make it a document that others can understand and engage with.

*Presenters: Holly Ross, NTEN: The Nonprofit Technology Network*

### **Choice Management - How can technology help us make better choices in law practice and organizational management (Lawyer Track)**

Wednesday 1/13/2010 3:45pm-4:45pm (Trinity)

This interactive session will be a review of the tools we use - and could use - in making decisions, individually or in groups, and how the associated processes and results might be improved. Can technology help us do better, with less stress? We'll talk about typical choices faced by advocates, clients, and managers, consider the challenges and opportunities they have in common, and explore new forms of Web-enabled collaborative deliberation.

*Presenters: Marc Lauritsen, Capstone Practice Systems*

## **THURSDAY, 1/14/2010**

### **Breakfast and Pro Se Collaboration Meeting**

7:30am-8:30am (18th Over Austin)

### **The New Frontier of Intake: Enhancing Intake with Online Tools (Lawyer Track)**

Thursday 1/14/2010 9:00am-10:30am (Sabine)

Intake and hotlines rely heavily on technologies to deliver effective and efficient access to legal services. Opening up the internet to the low-income legal services applicants is gaining more interest among programs as a way to increase access and improve the quality of services. This session features three organizations' recently implemented projects. Come learn about what technologies are used for web applications, how data analysis tools enhance program quality, how online intake is integrated into existing systems, and observations and lessons learned.

*Presenters: William Guyton, Alabama Legal Services; Martin Ostensen, Alberta Law Line; Cynthia Vaughn, Ohio Legal Assistance Foundation; Cheryl Nolan, Legal Services Corporation (moderator)*

### **Technology Policy and Procedures: Protecting Client and Program Data (Tech Track)**

Thursday 1/14/2010 9:00am-10:30am (Rio)

According to the Identity Theft Resource Center, approximately 222,168,244 individual's records have been exposed in 2009, for reasons ranging from accidental exposure to insider theft or hacking. As many legal services programs move to an increasingly online world, this number should serve as a sobering reminder of the need for carefully developed technology policies that are designed to prevent similar losses of highly confidential client and/or program data. This session will cover what elements make up a "good" policy, and how to go about developing and implementing policies that fit in with a program's culture without compromising the security of your systems.

*Presenters: Donald Carder, Atlanta Legal Aid Society*

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### **Website Breakout - Open Source Template (Website/Document Assembly Track)**

Thursday 1/14/2010 9:00am-10:30am (Trinity)

In 2009, LSC funded a new open source statewide website platform built on the Drupal Content Management System. Drupal for Legal Aid Websites (DLAW), developed by Urban Insight, is a shared codebase available to OST programs and other legal aid organizations. In addition to utilizing the powerful Drupal framework, the OST Base also features a recommended statewide website configuration, full NSMI integration, pre-built themes, and many other useful features. In this session, presenters from UI, NTAP, and Idaho Legal Aid Services will discuss template implementation, features, and future project plans.

*Presenters: David Bonebrake, National Technology Assistance Project (NTAP); Abhijeet Chavan, Urban Insight; Steve Rapp, Idaho Legal Aid*

### **Website Breakout - Pro Bono Net (Website/Document Assembly Track)**

Thursday 1/14/2010 9:00am-10:30am (Trinity)

This session will center on LawHelp statewide website network activities for the coming year, including program and technology priorities. Presenters will discuss the upcoming TIG-funded LawHelp template redesign and new feature sets to serve LawHelp's growing and diverse user base. Other topics will include national marketing and training support, LiveHelp and LawHelp Interactive updates. Attendees also will have an opportunity to share state highlights and network with one another.

*Presenters: Liz Keith, Claudia Johnson, Kate Bladow, Pro Bono Net*

### **E-Discovery Jeopardy (Tech and Lawyer Track)**

Thursday 1/14/2010 10:45am-12:15pm (Rio)

Who says learning can't be fun? Come play along as volunteers from the audience vie for great prizes using their e-discovery savvy in the classic Jeopardy format. Our own "Alex Trebek," will insure this session is both educational and entertaining. Be sure to answer in the form of a question!

*Presenters: Craig D. Ball, Attorney and Forensic Technologist*

### **Live Help or Pitiful Peter and the Adventures of Online Chatting (Website/Document Assembly Track)**

Thursday 1/14/2010 10:45am-12:15pm (Sabine)

This session will provide tools and resources to grantees on how to get started and add on more complex features to the Live Help tool. It will feature several successful Live Chat projects in Montana, Arkansas, Legal Aid of Orange County, the new NTAP Help desk, and Pro Bono Net initiatives among others. This session will also explore replication ideas, bilingual capabilities. Plus, live demo from the audience with Montana Legal Services Association"

*Presenters: Liz Keith, Pro Bono Net; David Bonebrake, National Technology Assistance Project (NTAP); Vince Morris, Center for Arkansas Legal Services; Alison Paul, Montana Legal Services Association; Jeanette Valencia, Legal Aid Society of Orange County*

### **Lunch**

Thursday 1/14/2010 12:15pm-1:15pm (Creekside)

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### **Ignite Plenary Session - Show and Tell of Technology Projects and Ideas (Plenary)**

Thursday 1/14/2010 1:15pm-2:15pm (Sabine-Rio)

If you had five minutes to share an idea, best practice or show off a TIG project, what would you talk about? What if you only got 20 slides and they rotated automatically after 15 seconds? Around the world geeks have been putting together Ignite events to show their answers. This plenary Ignite session will feature a series of short presentations highlighting innovative technology projects and ideas. It will be fast-paced and informative!

*Presenters: Marc Lauritsen, Capstone Practice Systems; Leah Margulies, LawHelp/NY; Steven McGarrity, Community Legal Aid Services, Inc; Kristin Verrill, Atlanta Legal Aid Society, Inc.; Claudia Johnson, Pro Bono Net; Madhu Lakshmanan, LSNTAP; Kathleen Caldwell, Pine Tree Legal Assistance; David Bonebrake, LSNTAP*

### **Responding to the Current Economy: Triage Tools and Resources for Military-Connected Individuals (Lawyer Track)**

Thursday 1/14/2010 2:30pm-3:45pm (Trinity)

Atlanta Legal Aid Society will discuss its upcoming project to create multimedia consumer materials to support a Fulton County State Court's newly forming self-help center. The National Consumer Law Center will assist Atlanta Legal Aid with the development of pro bono and pro se materials to assist programs with consumer-related technology projects. The session will also feature work in progress on a national web-based resource for military personnel, veterans and their families. Please bring your ideas for self-help resources and referrals that would be useful to your clients with a military connection.

*Presenters: Kathleen Caldwell, Pine Tree Legal Assistance; Vince Morris, Center for Arkansas Legal Services; Kristin Verrill, Atlanta Legal Aid Society;*

### **Strategic Planning for Telephone Systems: How To's and Examples (Tech Track)**

Thursday 1/14/2010 2:30pm-3:45pm (Sabine)

Strategic planning for telephone systems is becoming more complicated as new technologies accelerate the adoption of advanced functionality and applications within LSC members. The use of call center, wireless, cellular, personal area networks and converged technologies (voice/video/wireless over Internet Protocol) are creating new pressures on both capital funding and operating cost requirements, and require practical plans to leverage these new technologies. Mr. Steve Green – President of S.R. Green & Associates and Zahid Masood – Associate Consultant will address different strategic technology models that have been examined by LSC institutions and will discuss common successful principals that can be used to guide the strategic technology planning effort of the LSC members.

*Presenters: Steve Green, S. R. Green & Associates; Zahid Masood, Z Consulting*

### **What's New with LawHelp Interactive and A2J Author (Website/Document Assembly Track)**

Thursday 1/14/2010 2:30pm-3:45pm (Rio)

Whether you are new to document assembly or are a veteran HotDocs® and A2J Author® developer, you won't want to miss this session. You'll learn about "national server" upgrades and cool new tools in A2J Author®. The LawHelp Interactive and A2J Author® project managers will also share what training resources will be made available to the document assembly community in 2010 and what you can do to ensure a successful document assembly project.

*Presenters: Kate Bladow, Pro Bono Net; Rachel Medina, National Technology Assistance Project*

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### **Pro Se Clinics and Document Assembly (Lawyer Track)**

Thursday 1/14/2010 4:00pm-5:00pm (Sabine)

This workshop will feature the Los Angeles Superior Court Self Help Center, which has been using NPADO/LHI HotDocs templates for over 3 years to provide services to 300 visitors a day. The Self Help center uses online forms for divorce and custody petitions one on one and in group workshops. Some of the topics that will be highlighted are staffing (JusticeCorps), benefits to litigants of using online forms, and new initiatives in this and other LA region self help centers. *Presenters: Michelle Hopkins, Los Angeles Superior Court; Claudia Johnson, Pro Bono Net*

### **Using Imaging Software to Streamline Windows Systems Administration (Tech Track)**

Thursday 1/14/2010 4:00pm-5:00pm (Trinity)

One of the largest time sinks in the I.T. world is the installation and configuration of a standard desktop computer. Installation and configuration of an operating system, productivity software, utility applications, and security patches on a single computer alone can consume the better part of a day or more of an I.T. worker's time and energy. This session will explore and explain how the adoption of some simple desktop imaging tools can greatly streamline a program's approach to systems administration by reducing the amount of time needed to provision a fully functional desktop computer from days to minutes, and how the same technology can be used to effect near immediate recovery in case of disaster.

*Presenters: Donald Carder, Atlanta Legal Aid Society; Michael Bowen, Community Legal Services*

### **Website Usability and Understanding Web Analytics (Website/Document Assembly Track)**

Thursday 1/14/2010 4:00pm-5:00pm (Rio)

Do you really understand how users interact with your website? Do they find what they need or do they leave without the information they were seeking? This session looks at how to assess and improve the usability of your website. Learn about how to use web analytics and other tools to make your website more effective.

*Presenters: Abhijeet Chavan, Urban Insight*

## **FRIDAY, 1/15/2012**

### **Breakfast**

7:30am-8:30am (18th Over Austin)

### **NTAP and Pro Bono Net Updates – What's New for You in 2010**

Friday 1/15/2010 9:00am-10:00am (Sabine-Rio)

NTAP has new services to make your job easier on a day to day basis. This session will review services already in place and available and describe what we will be working on throughout the year. We will also outline ways to participate and contribute to the legal aid tech community. New services available now! HelpDesk and lsntap.org resources and assistance including guidance for the NEW Case Management Report, the Interactive National Technology Report, LegalMeetings, GIS mapping and more. Revisions to the lstech list – reaching out to advocates. NTAP's NEW training program – how it works for your schedule and budget. Participate in one of NTAP's advisory groups: training, LegalMeetings, Executive Leadership Roundtables, Helpdesk and Website services. Like the TIG conference, Pro Bono Net just turned 10, so in that spirit, this

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session will highlight 10 new web-based initiatives to support advocates and volunteers across the country. Learn about Pro Bono Net resources available for interactive content developers, statewide websites, pro bono support, LiveHelp and innovative collaborations to assist programs working on issues ranging from domestic violence to disaster relief.

*Presenters: NTAP: Kathleen Brockel, David Bonebrake, Madhu Lakshmanan, Rachel Medina and Leah Peabbles, National Technology Assistance Project; Pro Bono Net: Liz Keith, Claudia Johnson, Kate Bladow*

### **BTOP and maybe other funding sources**

Friday 1/15/2010 10:15am-11:00am (Sabine-Rio)

The U.S. Congress has appropriated \$4.7 billion to establish a Broadband Technology Opportunities Program (BTOP) for awards to eligible entities to develop and expand broadband services to rural and underserved areas and improve access to broadband by public safety agencies. This TIG session will provide information about Ohio's BTOP grant application made in August 2009 and will explore how federal BTOP funding may be available for legal services broadband initiatives. In addition, there will be an overview of some alternative technology funding sources beyond IOLTA and LSC.

*Presenters: Cynthia Vaughn, Ohio Legal Assistance Foundation*

### **TIG Updates from LSC**

Friday 1/15/2010 11:15am-Noon (Sabine-Rio)

Come hear about the revised TIG reporting and evaluation process, new grant software for TIG projects and what you'll need to know to process payment requests; next year's appropriations request; and information on applying for a TIG grant. (**Mandatory for 2009 TIG grantees**)

*Presenters: LSC TIG Staff: Bristow Hardin, Magali Khalkho, Glenn Rawdon, Jane Ribadeneyra*

### **Lunch**

Friday 1/15/2010 Noon-1:30pm (Creekside)