

2022 Legal Services Community Technology Survey



Conducted by the Legal Aid Association of California

For more information, please contact Alison Corn, Legal Design Attorney, acorn@laaonline.org



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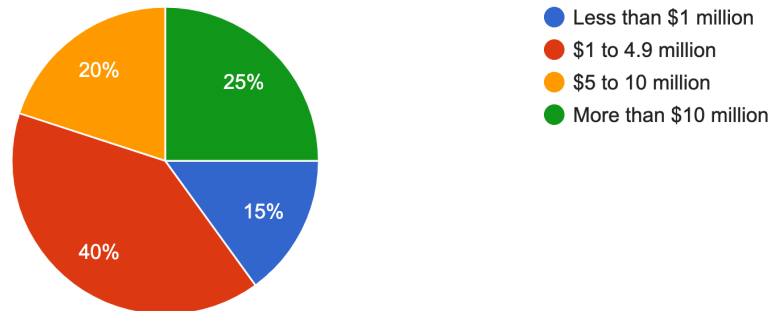
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Organization Information

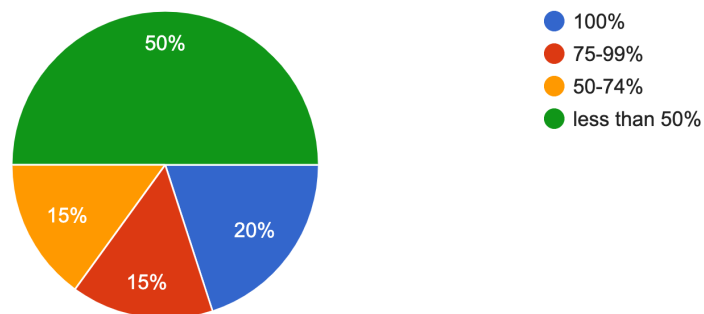
What is your organization's budget size?

20 responses



What percent of your IT services and tech support are provided in-house by your staff?

20 responses

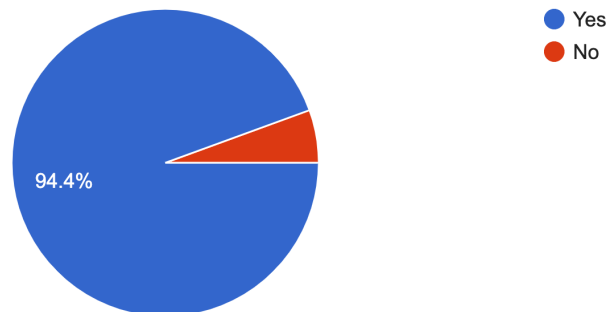


Case Management & Timekeeping

Case Management

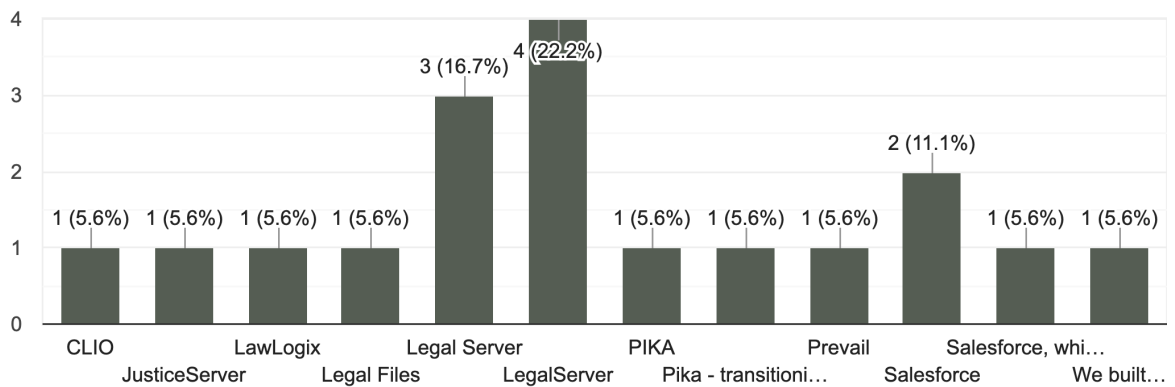
Does your organization use a case management software?

18 responses



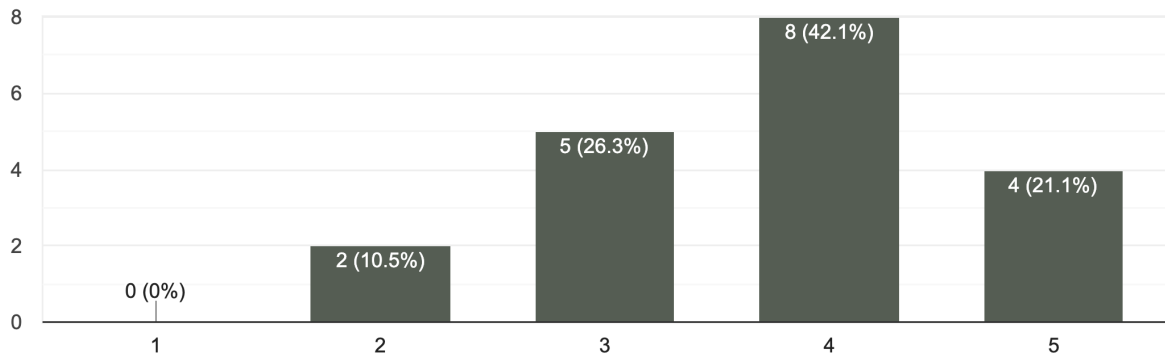
If yes, which case management software does your organization use?

18 responses



How satisfied is your organization with your case management software?

19 responses



Please describe how satisfied you are with your case management software. Include the name of your case management software in your response.

We have been using Legal Server since September 2020 and the software has made our intake process so much easier.

We LIKE PIKA, but it is no longer being supported. The alternative that we have to switch to is Legal Server which is going to cost a HUGE amount, I wish there was a cheaper alternative....

ETO- its horrible. Luckily we are migrating to legal server.

PLC switched to Legal Server in the last ten months. We are very satisfied, although are still adjusting to some features.

Very satisfied - great for customization and LegalServer definitely understands legal aid reporting needs. That said, integration with our accounting software (Abila MIP) would save a tremendous amount of accounting time.

LASSD last year moved to JusticeServer and there has been some growing pains with the flow of the system that we have had to work out.

We are very pleased with Salesforce but would like to explore other options.

Pika is fine but it went out of business and is not being updated any more. We are moving to CiviCore.

The good thing about LegalServer is that it is designed for Legal Aid. The limitations are that it doesn't have some of functionality and slickness that many users expect from modern digital services. I know there are programs exploring using Salesforce to try to get that modern

experience, but that requires a lot of organizational investment and coordination compared to LegalServer's out-the-box solution.

Prevail is working for us, though we are in need of an application upgrade, which we are working on.

LawLogix works well for our Immigration Program, but not so much for our other Programs (Housing and Economic Advancement)

LegalServer was designed for organizations like ours that have funding sources similar to ours. This makes it easy to assign funding codes to cases and to time slips. The system is modifiable by our admin, but it only allows us to modify about 80% of what we need to modify, which means sometimes we have to find workarounds. There are many other organizations like ours that use this system and it is very helpful being a part of a community that shares information, ideas, and questions that are emailed every day. Overall, the case management system, which is also our timekeeping system, meets about 85 or 90 percent of our needs. I believe most users are satisfied with the system.

Salesforce is not customized for our needs

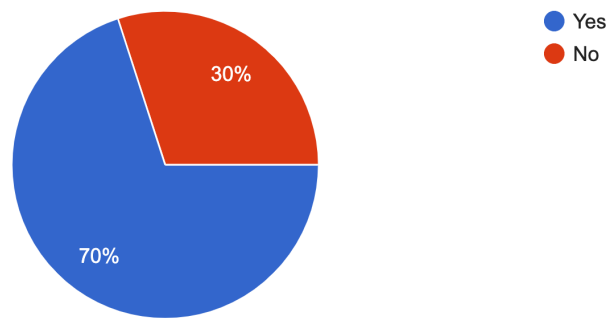
Salesforce is mostly sufficient for our organizational needs. Our organization put in a lot of work to customize it for our needs, however, so the standard platform would likely be different from our CMS. ODL is working on developing our CMS so that it can be used by a variety of legal aid service providers.

CLIO is really designed for a traditional law firm that bills clients. We would love something designed for a non-profit!

Timekeeping

Does your organization use a timekeeping program?

20 responses

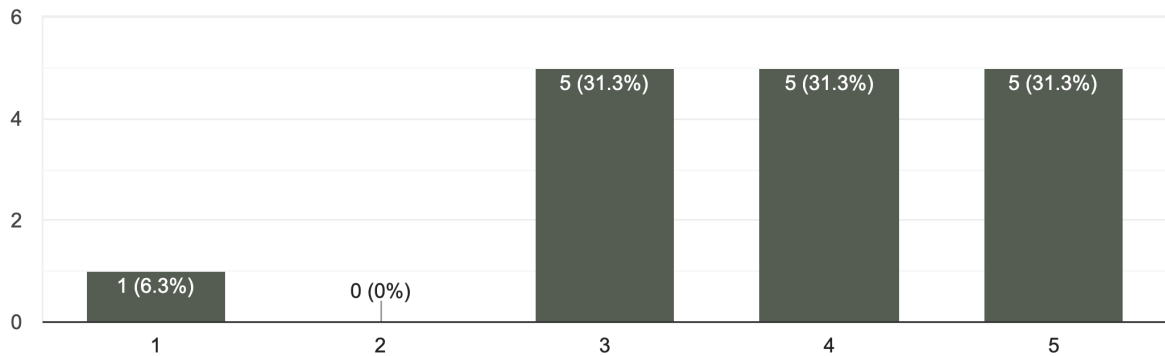


Which timekeeping program do you use?

LegalServer
Our own - we built it
ETO - will be transitioning
JusticeServer and Paylocity
Legal Files
Pika / CiviCore
CLIO
Toggl
Salesforce Time Tracking


How satisfied is your organization with your timekeeping system?

16 responses



Please describe how satisfied you are with your timekeeping system. Include the name of your timekeeping system in your answer.

ETO: It's really painful- it takes hours, we are hoping legal server will make it easier.
LegalServer: We think there could be some improvements but are generally satisfied, particularly that it's connected to the case management system.
The timekeeping system we use is google excel. It works perfectly.
Pika is good for timekeeping. Haven't started using CiviCore yet but expect it to be even better.
LegalServer: We only use it for some grants/contracts. It's ok and does the job.
CLIO: Same issue -- it is designed for a firm that bills private clients rather than billing to a funding source or not billing at all.
LegalServer was designed for organizations like ours that have funding sources similar to ours. This makes it easy to assign funding codes to cases and to time slips. The system is modifiable by our admin, but it only allows us to modify about 80% of what we need to modify, which means sometimes we have to find workarounds. There are many other organizations like ours that use this system and it is very helpful being a part of a community that shares information, ideas, and questions that are emailed every day. Overall, the case management system, which is also our timekeeping system, meets about 85 or 90 percent of our needs. I believe most users are satisfied with the system.
Toggl: Minimal features. Only one team uses it.
Salesforce is mostly sufficient for our timekeeping needs. It has a time entry system and ways to filter views. For some reason, it has been difficult to figure out an intuitive way to access

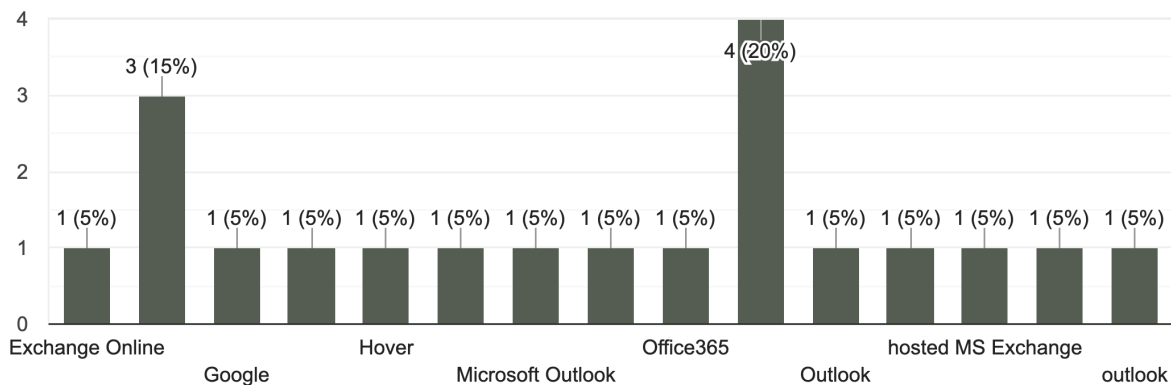


time entries though, which can be annoying for our practitioners.

Email

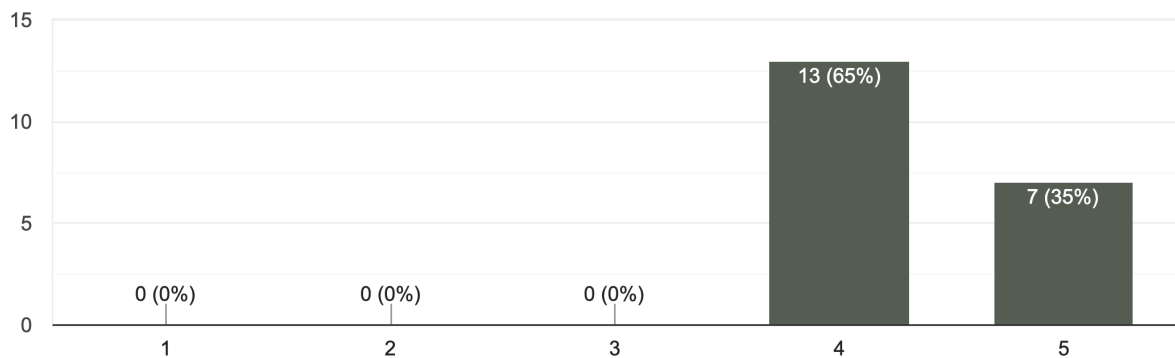
Which email system does your organization use?

20 responses



How satisfied is your organization with your email system?

20 responses



Please describe how satisfied you are with your email system. Include the name of your email system in your answer.

Microsoft Office365 is very easy to work with and is cloud based

Hover: It is NOT Google or Gmail based - so more secure and I have a lot of control.

Outlook: Works fine, continually update, links easily with Outlook calendaring
PLC switched to Office365 in fall 2021. Previously we had an outdated version of Office. 365 is great, but we could definitely use some support on the various tools that come with 365, like teams, OneDrive, etc.
Satisfied with Microsoft Outlook, however, there is a need for increased email security and spam/phishing filters.
outlook works as we want
Silversky hosted Exchange with several additional security features activated - works well
We are very satisfied with our google email system.
Gmail works great overall, but lacks adequate encryption options that we have to meet with a separate vendor.
Gmail is good. Not quite as many functions as Outlook, but integrates well with our overall Gsuite for Business setup.
Office365/Microsoft365 is very useful for us, and helps us beyond our email system. We rarely experience email outages, if ever.
Google Workspace (gmail) - user-friendly, well-integrated to gchat, google docs, sheets, etc. that make collaboration a lot easier.
Outlook: It does not mesh as well as it should with Macs.
Exchange Online: Standard-faire cloud-hosted version of Exchange. Being part of Office 365 means minimal to no maintenance required, and is always kept up-to-date by Microsoft. However, it is also subject to Microsoft's ill-timed and buggy updates, so uptime is not bulletproof.
We moved to Office 365 to integrate all the Microsoft apps in the cloud. It's better than what we had, but tech adoption and sophistication varies by employee. We don't have in-house tech support.
Gmail has met most of our organization's needs. You can pair it with extensions for Salesforce and Dropbox, which is great for our overall CMS organization.

Document Management

Electronic File Storage

How does your organization store and/or share electronic files, including confidential or private information?

20 responses



What specific software, program, or system do you use (e.g., in-house file server or cloud-based/hosted file server)?

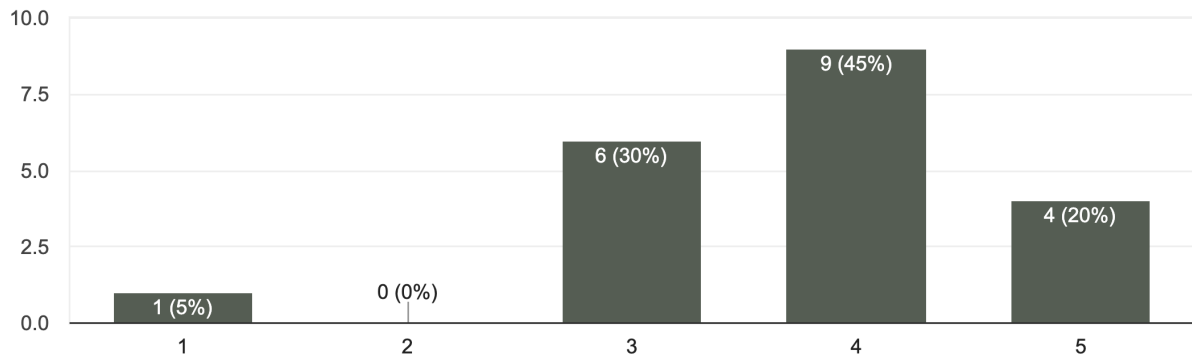
Microsoft OneDrive
Synology AND in PIKA
Unsure
We are hoping to move to sharepoint
Egnyte
SharePoint and OneDrive
Microsoft OneDrive/Teams/Sharepoint and on premise Microsoft file servers.Netdocuments (cloud based DMS)
Google Drive
Google Drive, LegalServer, in-house file server
Sharepoint/One Drive for some files. Client files saved on in-house file server
A combination of Sharepoint and Google Drive.



In-house
Dropbox
Cloud-based ... Box.com
On-Premise: Windows File Sharing; Cloud: SharePoint + LegalServer
Microsoft 365
Dropbox

How satisfied is your organization with your electronic file storage?

20 responses



Please describe how satisfied you are with your electronic file storage. Include the name of your electronic file storage in your answer.

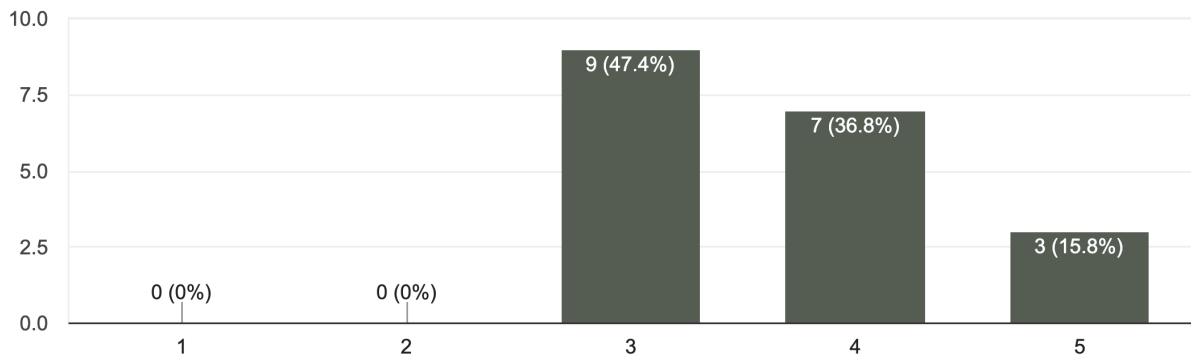
Synology and PIKA - WAY too techy for our advocates.
We're shifting to the cloud for ease of access, especially in a remote environment.
Egnyte works. It basically looks exactly like our in-house server, except in the cloud. It is lacking certain features that we think would be better (access through a website) and the organization of the files still needs to be improved. But it does the job for now.
SharePoint and OneDrive are great tools, however, there is a need for a more robust document management system to automate some of the file storage and flow.
Microsoft OneDrive: we are able to control security features and access better.
Netdocuments has worked well for us for the last 10 years

We use an in-house server, we would prefer a system that made it easier to share folders securely with collaborative partners.
GoogleDrive: We are very satisfied with our electronic file storage.
Google Drive is good - they give unlimited free storage to nonprofits as long as you keep everything in "Shared Drives"
SharePoint/OneDrive: would like client docs in cloud. need to sort out some remote access security issues and procedures first
SharePoint/Google Drive: We have had difficulty with the fact that we are an org based around Microsoft suite but staff also have access to Google and prefer it as they find it easier for sharing and collaboration.
In-house: We are satisfied with our internal file server.
Dropbox: We have experienced A LOT of problems with Dropbox. The most challenging problem being the loss of files and working to recuperate them. Dropbox is also not as intuitive or easy to navigate as we would want it to.
Box.com works well for us, we have had very little issues.
In-house: We are not satisfied with the current setup, and we are in the process of moving our on-premise files to Sharepoint for easier and more secure access.
Microsoft 365: We completed a move from a server-based system last year. There have been some sync and adoption problems that have frustrated some staff. Overall, it's great.
Dropbox is generally reliable, although sometimes there are technical issues that arise. adjusting to working from home was largely seamless because we were not reliant on a paper-based filing system but were already using Dropbox.

Electronic Sharing System

How satisfied is your organization with your electronic sharing system?

19 responses



Please describe how satisfied you are with your electronic sharing system. Include the name of your electronic sharing system in your answer.

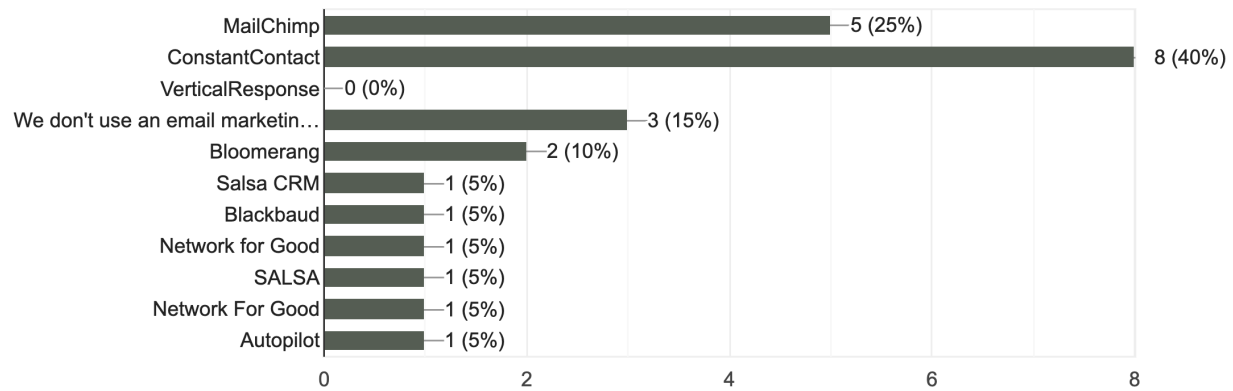
Synology/PIKA: too techy
I'm not sure about electronic sharing system, but I think this also means Egnyte? We can share files through Egnyte, and also through Google Drive. Google Drive does not work for everyone (especially some law firms), so that is not ideal. We need to develop a policy regarding sharing files through Egnyte, but once we get there, I think it will work. We also have used box.com and dropbox. Both are fine, but are not consistent.
SharePoint/OneDrive: It is cumbersome to use.
Microsoft OneDrive/Teams/Sharepoint and on premise Microsoft file servers: we have external Teams created that we restrict access to staff to be able to share.
Google Drive: We are very satisfied with our electronic sharing system.
Google Drive is a bit limited with shared access with people outside the org. There are workarounds, but they can be a bit of a hassle.
SharePoint/Google Drive: We have had difficulty with the fact that we are an org based around Microsoft suite but staff also have access to Google and prefer it as they find it easier for sharing and collaboration.
OneDrive and SharePoint extremely useful for sharing files internally, and can really pare down

who has access to what effectively.
I think this is also Box.com. Seems to work great, only thing is that we end up using google docs for a lot as well.
On-Premise: Windows File Sharing; Cloud: SharePoint + LegalServer: We are not satisfied with the current setup, and we are in the process of moving our on-premise files to Sharepoint for easier sharing and more secure access.
There is an issue with sharing docs from Microsoft 365 (ie, Sharepoint/One Drive) with outside pro-bono's, since many have firewalls that block ability to see docs. We often have to email docs and can't collaborate in the cloud, which is annoying. We also maintain separate Google and Dropbox accounts for this purpose.
Dropbox makes it easy to access the same files. We can also share folders with clients and ask them to upload documents to specific folders. It provides an easy way to share electronic case files with clients as well, when needed.

Marketing

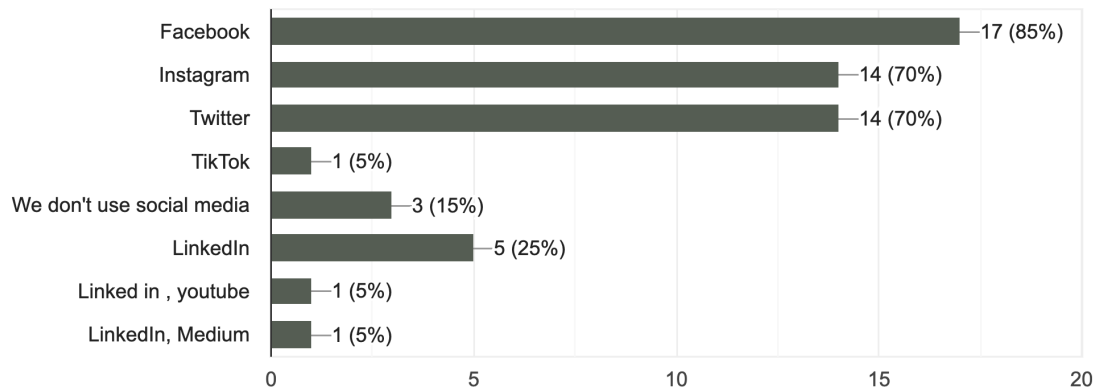
Which email marketing services does your organization use?

20 responses



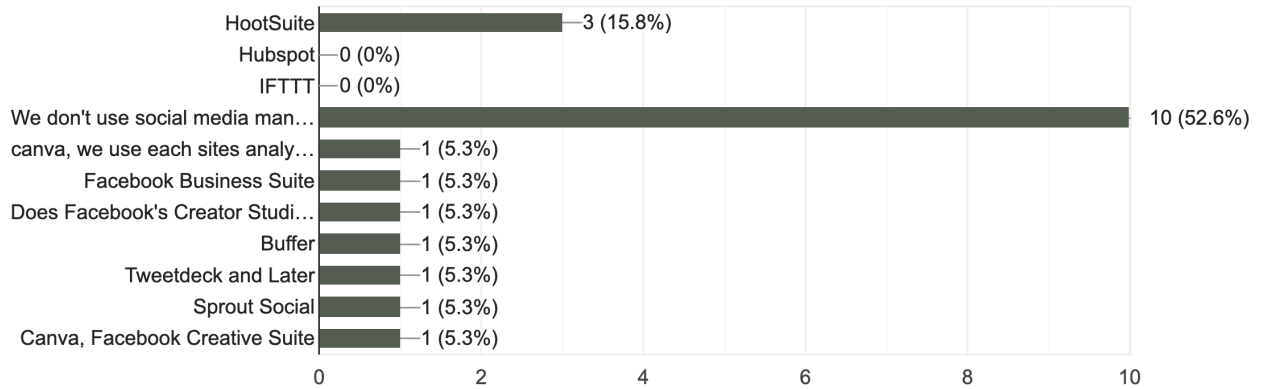
Which social media platforms does your organization use?

20 responses



Which social media management tools does your organization use? (These are tools that manage and analyze social media analytics all in one place.)

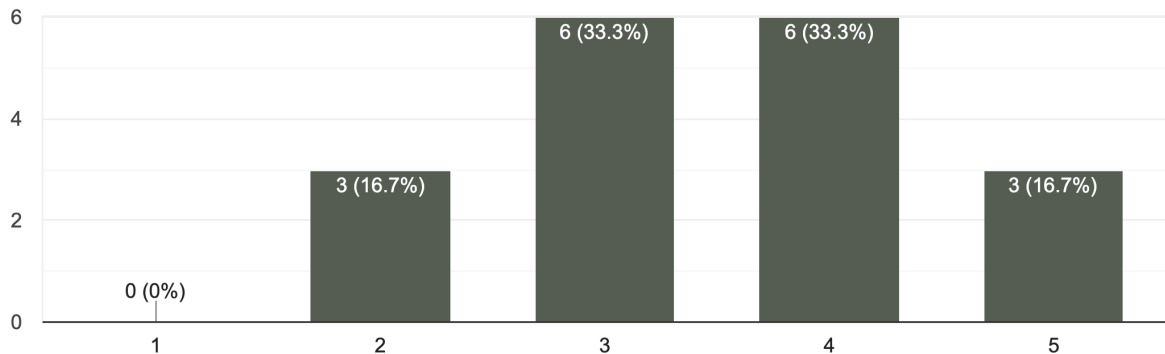
19 responses



Email Marketing

How satisfied is your organization with your email marketing?

18 responses



Please describe how satisfied you are with your email marketing. Include the name of your email marketing platform in your response.

We do not "market" beyond raising. The work comes to us.

ConstantContact has made a lot of changes recently that are very frustrating (no internal hyperlinks in emails, inability to have two email addresses in a "send to" link). I am urging our organization to look at options besides ConstantContact.

We use Salsa for email marketing with limited success.

We use Constant Contact but will be switching to Network For Good's All-in-One software that will allow us to track e-mails and donor management in one platform.

Bloomerang is good. My understanding is there aren't quite as many analytics available (e.g., click and conversion rates) as some other platforms, but it's very easy to use.

Frustrated with Constant Contact, limited flexibility.

We are satisfied with the email marketing we do using Mailchimp.

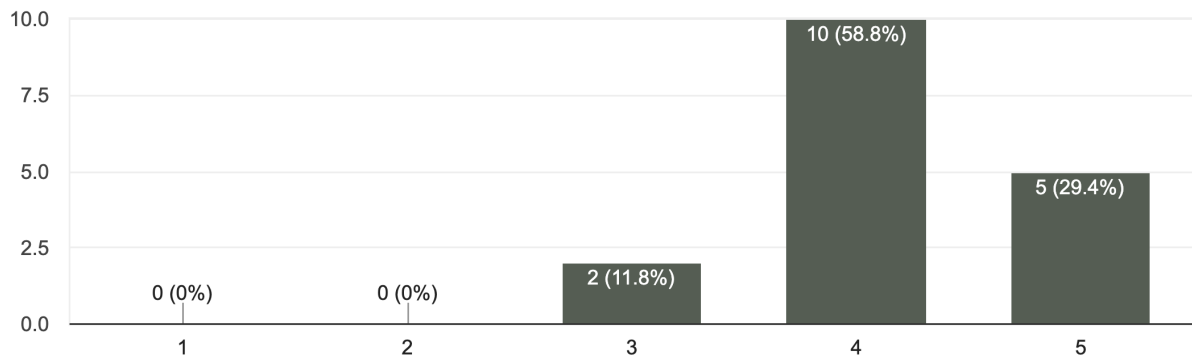
(Mailchimp) Often our outbound communications goes to recipients' spam boxes.

Not very satisfied with autopilot.

Social Media Platforms

How satisfied is your organization with your social media platforms?

17 responses



Please describe how satisfied you are with your social media platforms. Include the name of your social media platform in your response.

Facebook, Instagram: We need someone internally dedicated to social media, but otherwise the platforms have worked fine for our needs.

Facebook, Instagram, Twitter: We are very satisfied with our social media platforms.

Facebook, Twitter, and LinkedIn are fine!

In our use of the social media platforms of Facebook, Instagram, twitter, and LinkedIn, we are satisfied with our experiences so far.

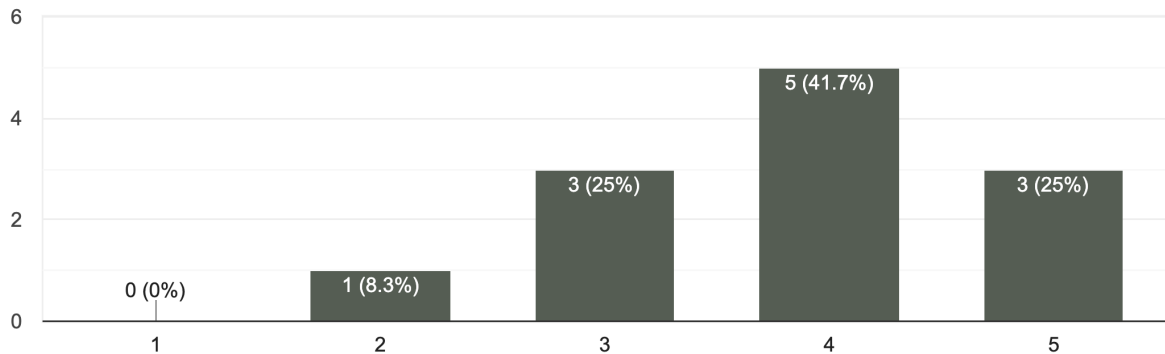
(FB, Twitter, LinkedIn, Instagram): Effective and easy to use.

We are satisfied with Twitter, Instagram, Facebook, LinkedIn, and Medium.

Social Media Management Tools

How satisfied is your organization with your social media management tools?

12 responses



Please describe how satisfied you are with your social media management tools. Include the name(s) of your social media tools in your response.

HootSuite is generally fine. If I had more time to learn it, I think I might have more feedback. For twitter, I often go directly to the website to post because it's more convenient. When posting to all three, HootSuite serves its purpose.

The primary tool we use at this time is through Facebook Business Suite. We do not use our CRM or third-party management tools at this time. Facebook works well enough for our purpose, but we will likely revisit this topic in the near future.

All we really use is Facebook's Creator Studio to manage Facebook and Instagram posts (scheduling, analytics, etc.).

Buffer lets you coordinate up to 3 services without having to upgrade to a paid version

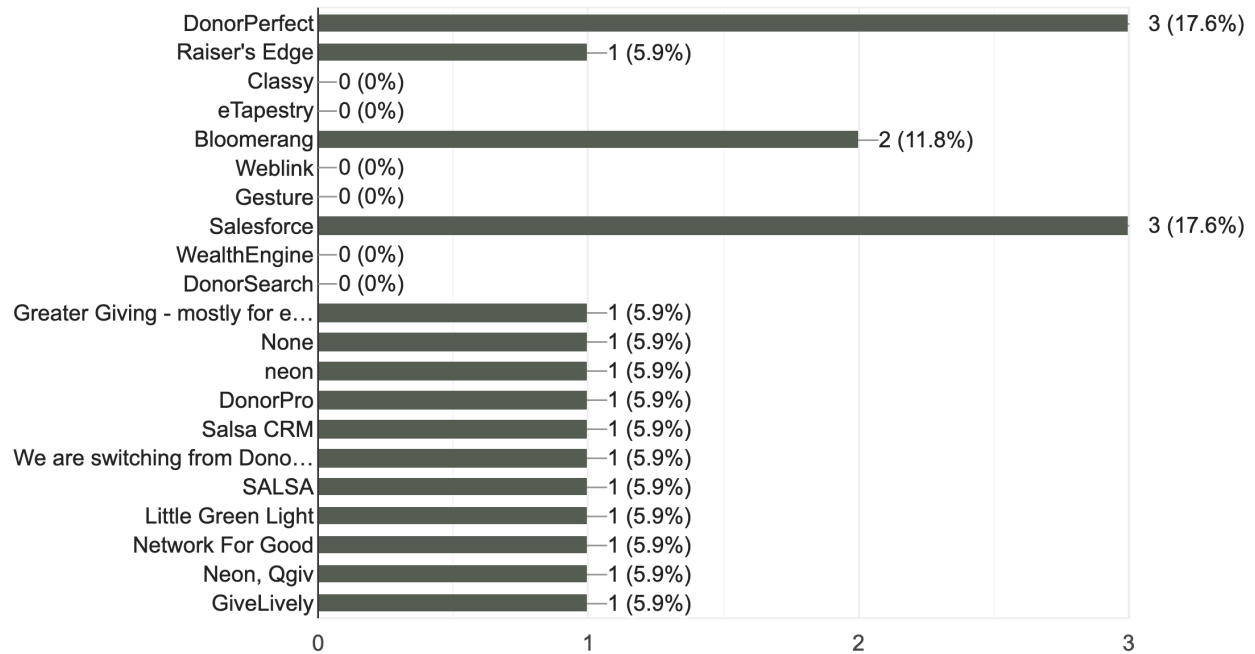
(Sprout Social): Really easy calendar which crossposts to multiple platforms.

Satisfied with Canva and Facebook Creative Suite.

Development Software

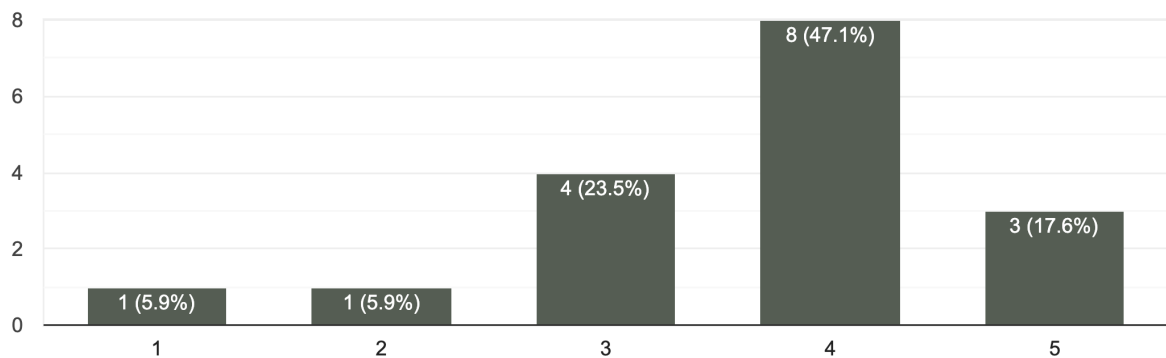
What software does your organization use for development purposes?

17 responses



How satisfied is your organization with your development software?

17 responses



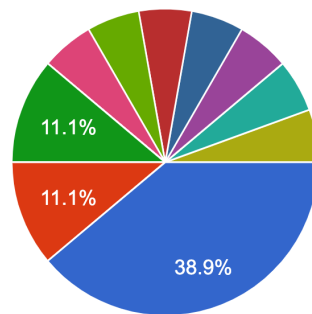
Please describe how satisfied you are with your development software. Include the name of your development software in your response.

Bloomerang, Greater Giving - mostly for event management: I love that it is all together in one site.
DonorPro: We are looking for other donor management software. It would be great if it could somehow talk to Legal Server, but we haven't found anything like that.
Salsa CRM and Salsa Engage have appealing interfaces, but the actual functionality is limited. Salsa CRM and Engage are not fully linked, which means that duplicative efforts must be expended to input data in both programs. Figuring out how to perform simple tasks requires searching and reading articles in the knowledge library, which are not always clear. In addition, Salsa's support is not responsive to user needs.
We are very satisfied with salesforce.
We are switching from DonorPerfect to Network for Good this month. NFG is a payment processor, donor management database, and email marketing system in one. We also use GiveLively for their free text-to-give feature.
Bloomerang is very helpful
I think that our team would have benefited from more training on how to use Donor Perfect properly. Also some newer members who have used other tools such as Raiser's Edge say that it has added functionality.
Little Green Light is an affordable alternative to many of the applications you listed
Network for Good: Great for donor management, but we would like it to work for advocacy purposes as well.
We use Neon to track donors and volunteers and it works fine for our purposes. We use Qgiv for generating our general donation page on our website.
GiveLively is free and has a lot of essential features and is easy to use. Salesforce has great capacity but is very difficult to manage.
Salesforce satisfactorily meets our needs.

Internet & Phone Service Providers

Which internet service provider does your organization use?

18 responses

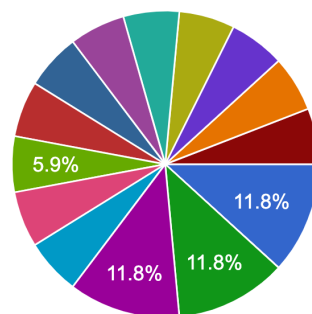


- AT&T
- Comcast/xfinity
- Charter
- Spectrum
- Time Warner
- Frontier
- Airespring
- I can't remember. Maybe TelePacific?

▲ 1/2 ▼

Which phone (voice) carrier does your organization use?

17 responses



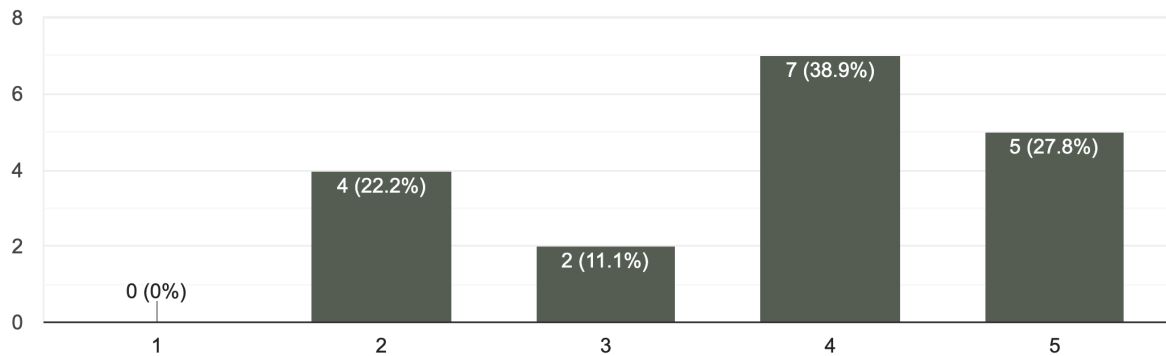
- AT&T
- Comcast/xfinity
- Charter
- 8x8
- Vonage
- Mitel
- Univerge
- 8x8 (VOIP)

▲ 1/2 ▼

Internet Provider

How satisfied is your organization with your internet provider(s)?

18 responses



Please describe how satisfied you are with your internet provider. Include the name of your internet service provider in your response.

AT&T: We are at the end of the line and it is not always reliable.
AT&T: Fast - fiber
TelePacific is generally reliable. No Complaints.
Centurylink/Lumen: Dissatisfied- Frequently outages and delays in responding to service requests delay program operations.
We contract with a community partner for secure internet and telecom services.
We are very satisfied with our internet provider sonic.
AT&T goes down from time to time
We use Comcast, TPX, and Sonic at our 2 offices. TPX could have better account management.
Comcast/xfinity: We have had occasional outages which have resulted in a lot of disruption.
We are a part of UC Hastings internet -- it can be glitchy!
Spectrum and Frontier: No issues with service for the most part.
AT&T - service gets disrupted to our downtown SF location with shocking frequency.

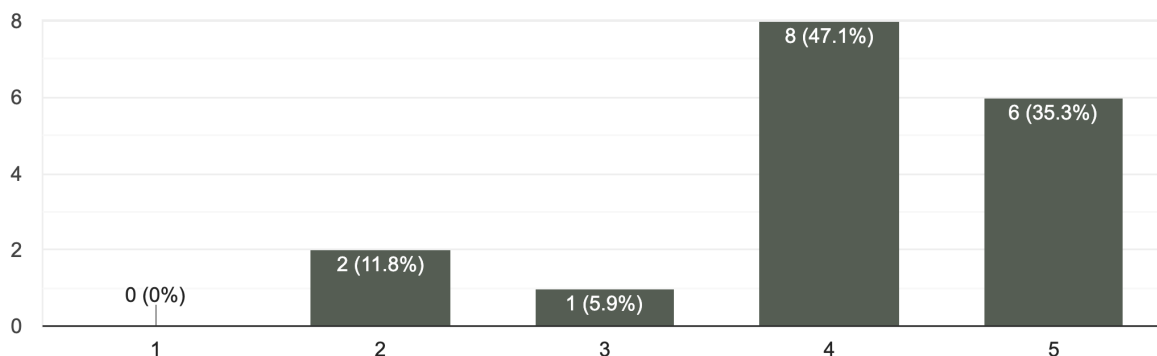


Comcast has frequent outages that disrupt our work.

Phone Provider

How satisfied is your organization with your phone provider?

17 responses



Please describe how satisfied you are with your phone provider. Include the name of your phone provider in your response.

Univerge: Integrates seamlessly with our computers, cell phones,, and voicemail, including sending a transcription of all voicemail messages by email

8x8 is okay. There is sometimes a delay in the audio, which makes for some very awkward phone calls, especially when using the app on your cell phone. It also sometimes has trouble connecting via wifi/carrier minutes and basically always tells us there are connectivity issues. There have been issues with changing outgoing voicemail messages. And we have not yet figured out what to do to provide phone access for in-house volunteers (like summer clerks).

We contract with a community partner for secure internet and telecom services.

We are very satisfied with our phone provider vonage.

Dialpad enables us to have remote web-based phone answering. Can also sync to cell phones if desired.

MS Teams works well for our needs.

Vonage: Ability to integrate it to Laptops and use new features like text messaging, etc. has been great.

Microsoft Teams: We get a lot of spam calls, but otherwise having internet phone numbers is great!

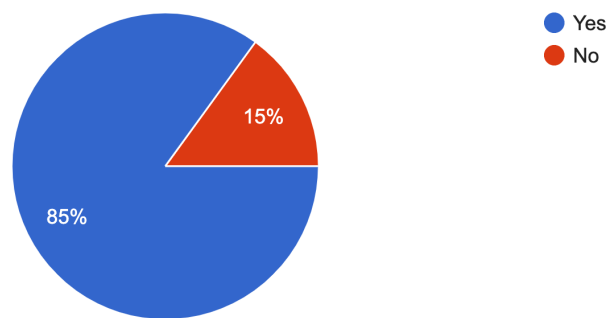
8x8: No issues with service for the most part. Service uptime is not bulletproof, but near 99%. Some issues when updates to the platform is deployed, but is quickly fixed within a day.

Sonic - no problems, easy customer service.

Not many issues with Comcast, I believe.

Does your organization use a VoIP system? (Voice over Internet Protocol is the transmission of phone calls over the Internet, instead of using traditional telephone landlines.)

20 responses



If yes, does your organization use a VoIP system for phone intake or other uses? What program does your organization use, and are you satisfied with it?

Mitel Contact Center

NUSO/legal server

We use 8x8 and we use it for everything. It is ok. Not great. Not sure if the issues are common to all VOIP providers, or just 8x8 because this is the only one we've ever used.

Intake call center, hotline legal assistance, and general staff direct lines.

We are using 8x8 for our call center and staffing phones.

Econn/ESNA

We use a paid Google Voice numbers that can be used via a phone app or on a computer browser.

Dialpad

CallTower. We like it because it integrates with Microsoft Teams

We recently moved to UnivergeBlue. People seem to like it. More integrations with LegalServer

would be a plus.

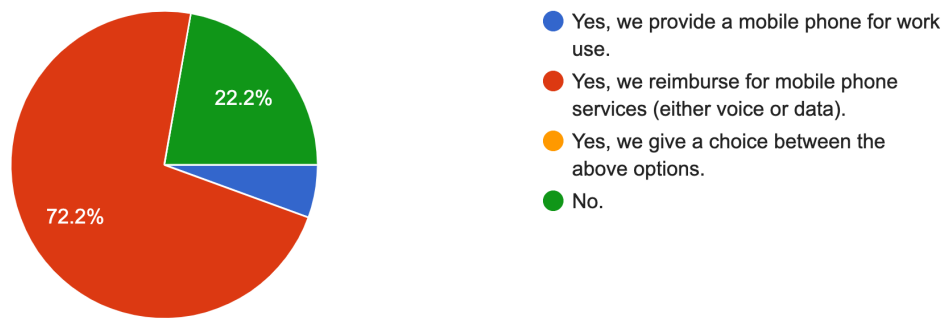
Microsoft Teams, and yes it is working well.

8x8

Google Voice and Whats App for client calls while remote. Yes, fairly satisfied.

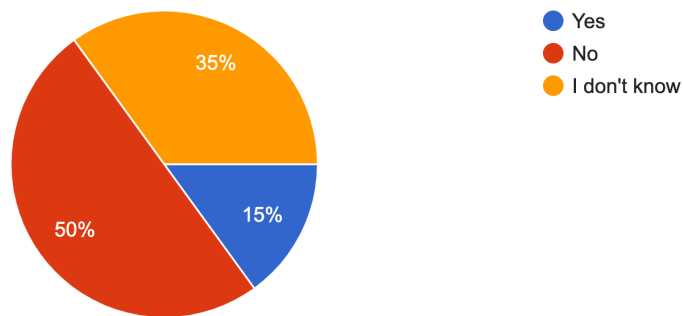
Does your organization cover mobile phone use for attorneys?

18 responses



Is your organization currently a beneficiary of the California Teleconnect Fund? (The CTF program provides a 25% discount for voice services and a 50...s, hospitals, and other non-profit organizations.)

20 responses

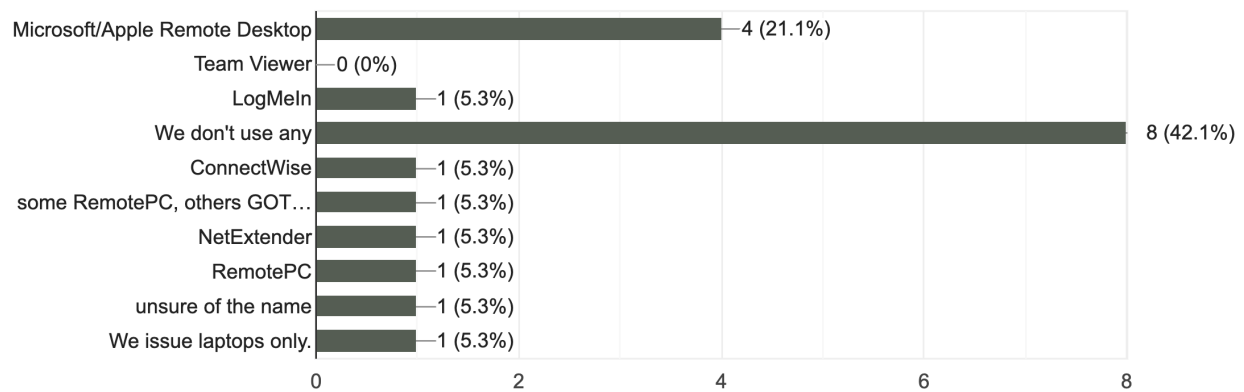


Remote Access & Meeting Software

Remote Desktop Tools

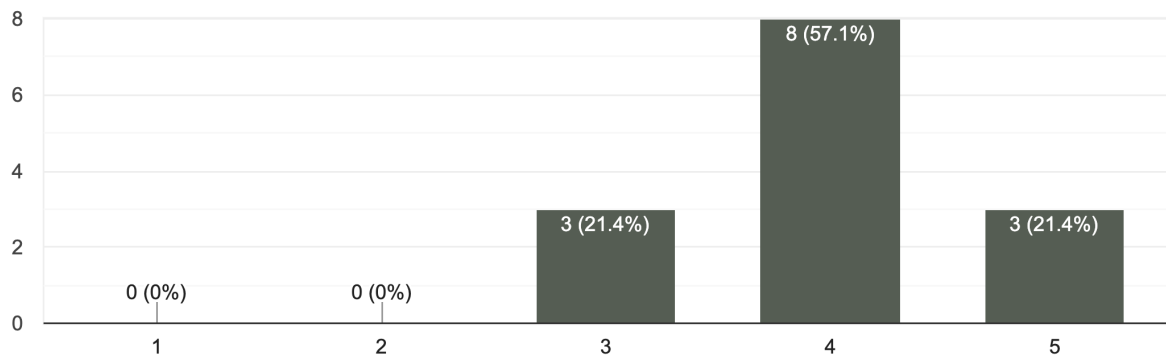
Which remote desktop tools does your organization use for non-IT staff to access their office computer?

19 responses



How satisfied is your organization with your remote desktop tool?

14 responses



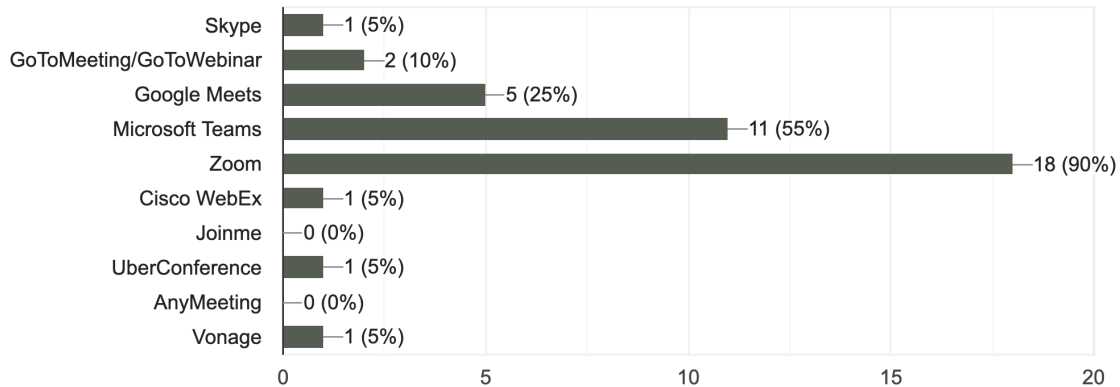
Please describe how satisfied you are with your remote desktop tool. Include the name of your remote desktop tool in your response.

ConnectWise: Works very well if the remote computer is connected through a fast internet
LogMeIn: Now that we use Egnyte, we don't use LogMeIn much anymore. When we were using it consistently, it was very frustrating for staff. Many folks would only log on when they had to, and would transfer files all at once, rather than working on LogMeIn all day. It was inconsistent and would disconnect people. Plus, every time the home computer restarted, LogMeIn became unavailable, which was problematic when people had deadlines.
Microsoft/Apple Remote Desktop: Generally works ok.
Microsoft Remote Desktop works well for us.
We use Microsoft Remote Desktop Connection over a Remote Desktop Gateway. It is very functional but could be more stable.
We moved to 100% cloud during the pandemic, so employees do not have to VPN in to our servers or utilize a remote desktop, as before.

Virtual Meeting Software / Conference Call Services

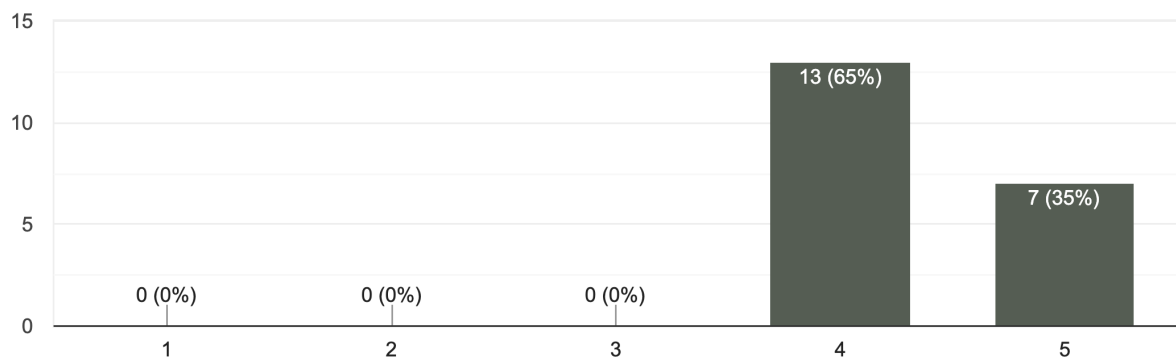
Which virtual meeting software and conference call services does your organization use?

20 responses



How satisfied is your organization with your meeting software?

20 responses



Please describe how satisfied you are with your meeting software. Include the name of your meeting software in your response.

Zoom: Is easy enough for our attorneys and advocates to use.
Zoom works better and has more options than the rest
Zoom has been great. We have been able to use both basic and licensed users and have been

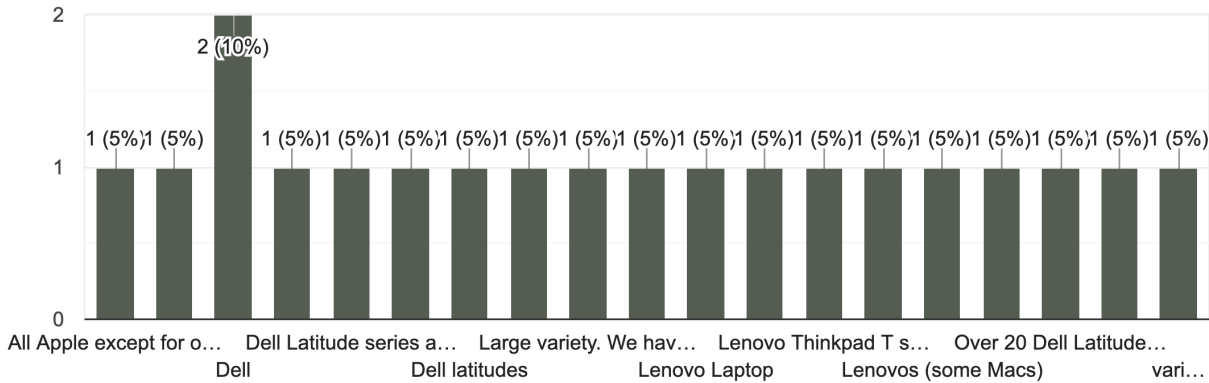


able to utilize the registration feature, breakout rooms, and many other tools that have been beneficial. We now have Teams also, but the office hasn't really used it much.
There are challenges in utilizing break room features on Microsoft Teams - generally in the form of delays in assignment and opening. Other than that challenge we are satisfied with both Microsoft Teams & Zoom
Google Meets/Zoom: We are very satisfied with our meeting software.
Pretty satisfied with Zoom overall, but some of the add-ons can get pricey (e.g., webinar).
Google Meet is great for internal meetings because a link is created every time you create a meeting in Google Calendar, which saves time setting up links. Zoom is great for everything else.
Both Zoom and Teams work well. We have some issues with the fact that we use two different platforms causing confusion.
MS Teams works well for us, and has since the start of the COVID pandemic.
Google Meets occasionally freezes.
Teams can be glitchy but is very easy to use. Zoom keeps getting better and more reliable.
Zoom is the preferred platform for stability and connectivity, but MS Teams is available to more staff thus is more widely used. MS Teams unfortunately uses a lot of system resources, so it can be unstable especially when there are lots of video participants.
We use Zoom for most external meetings and Teams video for internal. Satisfied with both. Teams doesn't have as many features as Zoom and is sometimes harder to include external parties.
Google Meet and Zoom are sufficient for our use.

Hardware & Other Devices

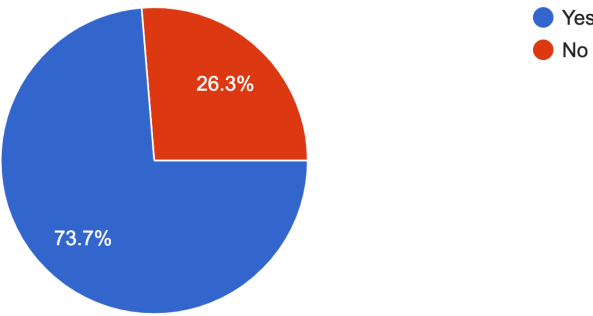
If yes, what type of laptop and/or tablet?

20 responses



Does your organization own any printers (other than those that are resident in your office and there for everyday use)?

19 responses

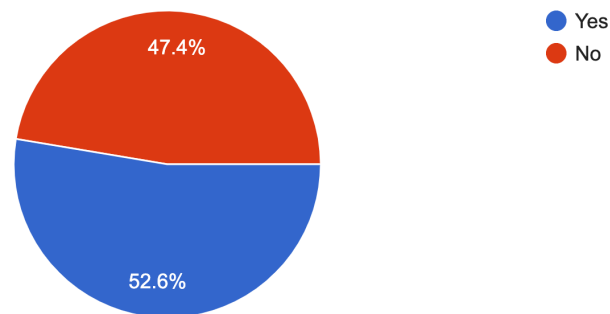


If yes, what type of printer?

Xerox and Brother
Canon, Epson, Kyocera
Brother MFC-L2710DW and Brother MFC-L3770CDW
HP Laserjet M605
HP and Brother
HP printers for individual use
HP LaserJet
3 Brother printers
HP envy
Copystar / Kyocera
We've bought small, home-use printers during the pandemic for some positions. Varying kinds. \$100-150.
Toshiba

Does your organization own any mobile hotspots?

19 responses



Are you satisfied with your laptops? Why or why not?

Dell laptops and Microsoft Surface Pro: yes, Users laptop for at home and in the office

All Apple except for our bookeeper, who uses QB on a PC: I am the IT person so there is VERY little cruft I need to clean out and they last a long time - well worth the higher original investment.
Lenovo: Too early to tell-- just now converting from desk tops
Dell: yes
Mostly Dell laptops: Yes, they work well
Lenovo laptops and Surface Pros: Yes, they meet our needs in functionality and portability.
Dell latitudes: Yes, with the warranty getting the laptop fixed by Dell is easy.
Lenovo Thinkpad T series: yes
Lenovo: Yes, we are satisfied with our laptops.
Windows laptops: We have a couple older laptops that will need to be retired soon. We also bought new laptops in the last year or so.
Lenovo ThinkPads and Apple Macbooks: Lenovo Thinkpads have been our go-to for 10 years and they are good, but in the past couple years we've noticed more of them tend to arrive with mechanical problems. Maybe just our anecdotal experience with 2-3 machines, but we never used to have any problems at all. Also, they've gotten more expensive and Macs have gotten less expensive, so we've started offering new employees their choice since they're the same price now.
Large variety. We have been experimenting with different models to balance tech needs with cost. Most recent are HP 250 G8: We've had complaints for some being too slow. We think that the remote needs require more RAM so are now purchasing models with at least 16 RAM. This has made a difference in speed.
Dell: Generally yes but there is an effort to provide upgrade more because staff have problems with older laptops.
Over 20 Dell Latitudes, 2 Microsoft Surfacebooks, and 2 Surface tablets: Yes, Dell provides excellent warranty and support options.
We have not yet been able to purchase laptops for everyone on staff. We have also experienced some issues with the laptops of choice - defects. Other staff continue to use personal laptops because CLSEPA cannot provide Apple computers.
Lenovos (some Macs): Yes
Dell Latitude and Microsoft Surface: Yes, they get the job done.
Dell Latitude series and Apple Macbooks: We just switched from Dells only to giving a choice between Dells and Macbooks this year. So far, everyone has opted for a Mac.

one PC and a few Macs and iPads: people use their own laptops for the most part.

Are you satisfied with your tablets? Why or why not?

No with regards to surfacepros, they are not capable of handling the heavy workload, video conferencing, and multitasking that routinely occurs at our firm.

Are you satisfied with your printers? Why or why not?

Brother MFC-L2710DW and Brother MFC-L3770CDW: Yes, they have not had any issues so far

HP Laserjet M605: Yes

Yes, we are satisfied with our HP and brother printers.

HP printers for individual use: Yes, the print in BW and color and can be used to print wirelessly. They are a bit slow, but are OK for light daily printing.

Yes, brother inkjet printers are extremely reliable

HP envy: yes, for limited use only

Copystar / Kyocera: Yes. They get the job done.

We've bought small, home-use printers during the pandemic for some positions. Varying kinds. \$100-150. Big mama printer at the office; small ones at people's homes. The issue is more complex jobs when everyone is remote--we also got an account at FedEx Office for these, as a convenience.

Toshiba: yes- very useful as they have multiple functions (printing, scanning, copying)

Are you satisfied with your mobile hotspots? Why or why not?

We have owned them since pre-pandemic. They generally work fine.

Yes, the only issue has to do with amount of Data usage

We do not use any mobile hotspots.

They do not accommodate video and are VERY expensive

Yes, they seem to provide ample coverage for the tablets when our Outreach team is in the field.

We disabled them. The costs were extremely high.

No problems reported

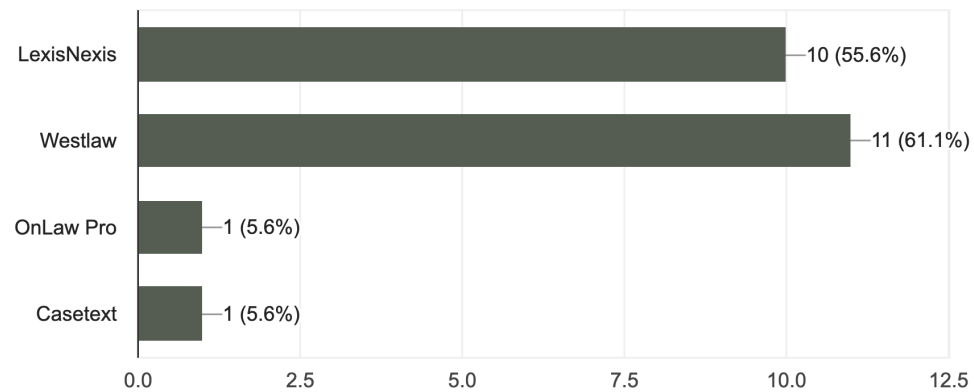
Yes. They get the job done.

Other Technologies

Legal Research Software

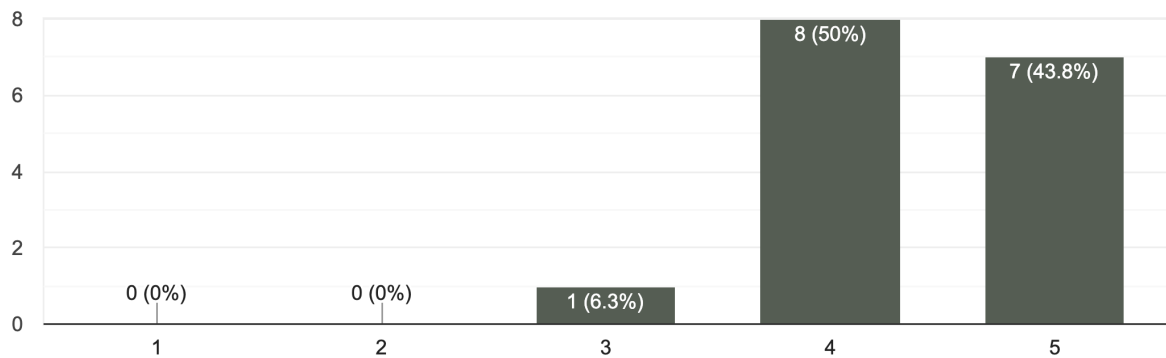
Which legal research software does your organization use?

18 responses



How satisfied is your organization with your legal research software?

16 responses



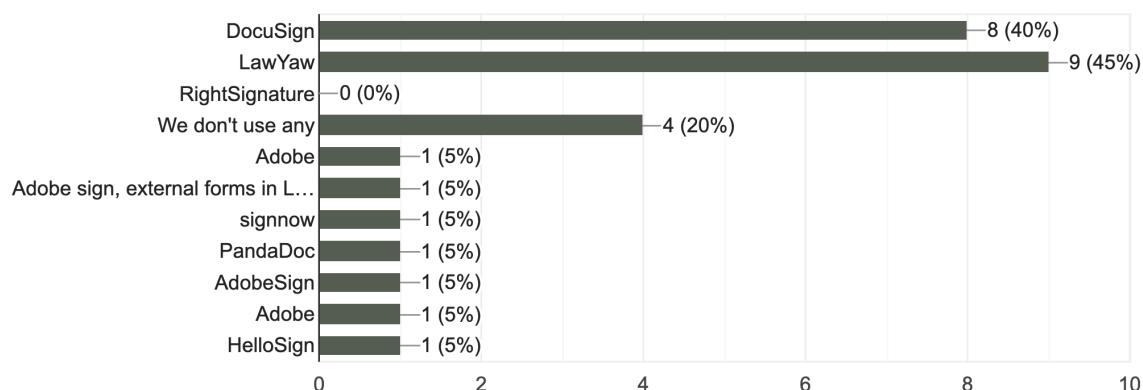
Please describe satisfied you are with your legal research software. Include the name of your legal research software in your response.

LexisNexis: Please describe satisfied you are with your legal research software. Include the name of your legal research software in your response.
Westlaw: Has most of the treatises we use, but not all.
Lexis has been fine. A bunch of folks want to switch to Westlaw, and we are strongly considering that. We almost switched in 2021, but ran out of capacity to fully analyze the cost/benefits of each program.
We use legal research software. We like using Lexis Nexis.
Westlaw is wonderful
Westlaw: We are fortunate to get free access through our affiliation with UC Hastings
Westlaw Next gets the job done.
Westlaw for the most part accomplishes what we need it to.

Document Signing Software

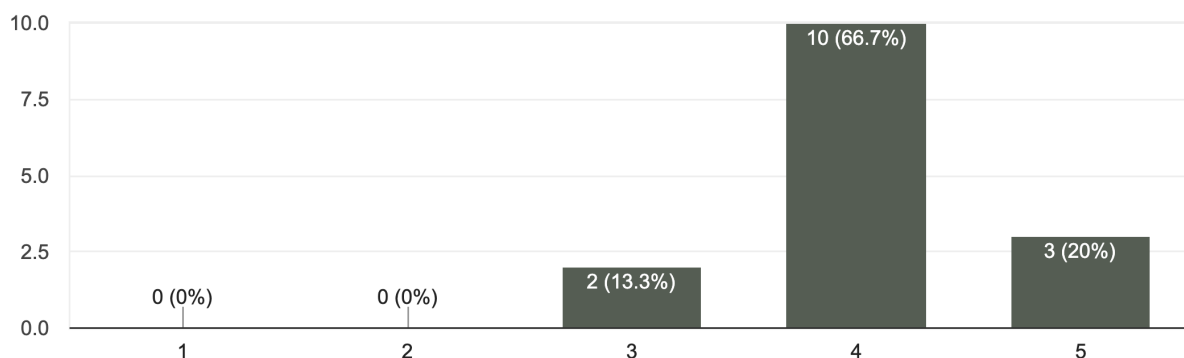
Which document signing software does your organization use?

20 responses



How satisfied is your organization with your document signing software?

15 responses



Please describe how satisfied you are with your document signing software. Include the name of your document signing software in your response.

We mostly use LawYaw. We have used Adobe for a few things, especially recently. However, immigration forms need replicas of wet signatures, which apparently can only be created through DocuSign. We are in the process of getting DocuSign also. Although I'm curious if all three of these are necessary; our immigration team thinks so.

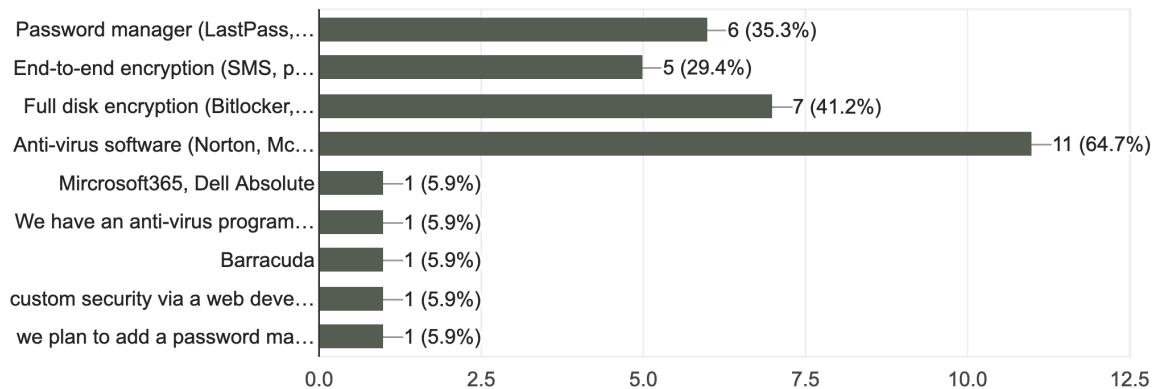


We are very satisfied using DocuSign.
We used PandaDoc's free version and have been able to add ~20 staff members to our workspace for free. There are a couple paid features, but we can live without them.
DocuSign, LawYaw: Generally satisfied and helpful for remote services.
DocuSign, AdobeSign: DocuSign is shared by all staff. It is costly.
Docusign is easy enough to use!
Lawyaw can be temperamental at times, with downtimes taking a few hours to resolve. However, the platform is serviceable for the most part and is easy to use.
Docusign works well for what it is. A little unclear when to best use Docusign vs. Adobe Sign.
HelloSign is sufficient for now

Security-Related Technologies

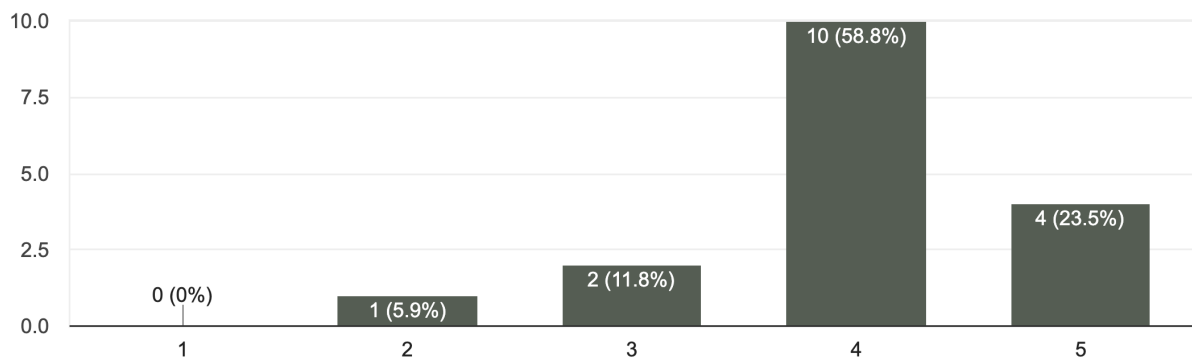
Does your organization use any of the following security related technologies?

17 responses



How satisfied is your organization with your security-related technology?

17 responses



Please describe how satisfied you are with your security related technology. Include the name of your security related technology in your response.

Dashlane and LastPass - which we use for laptops for attorneys and advocates

We have an anti-virus program-- not Norton or McAfee: Before we upgraded, we were shut down by a hacker

We have McAfee and we haven't had any issues (knocking on wood).
We are satisfied with Norton.
Anti-virus software (Norton, McAfee): We're really looking to improve our security-related tech, but often feel like we don't know where or how to get started!
We use the encryption and security features built into GSuite for Business. Our IT person says it's good and we haven't had any problems.
I think our organization could benefit from more support/resources on security management. Some of this is available from LSNTAP but I think LAAC could play a role in really highlighting the importance of this to legal aid leaders.
We use Webroot Endpoint Protection, which was recommended to us by our IT services provider.
We use Dashlane for passwords, seems to be working well.
End-to-end encryption (SMS, physical token, etc.), Full disk encryption (Bitlocker, File Vault, etc.), Anti-virus software (Norton, McAfee): Security products work well together while taking only the minimal amount of resources.
Anti-virus software (Norton, McAfee), we plan to add a password manager this summer: Our outsource IT services firm handles the security. Spam and phishing still get through, doesn't seem to be a good way to stop that.
Password manager (LastPass, Keepass, etc.), End-to-end encryption (SMS, physical token, etc.): It is OK

Has your organization experienced any security-related issues in the past 3 years? If so, can you provide more information about those issues (including things you learned) to share with our community?

We fell victim to a ransomware attack about 3 years ago. The lesson was to back-up your servers regularly!
Beyond the run of the mill phishing attempts, we have had one instance where a user's credentials were compromised, but we were able to secure the account before any damage could be done. Ultimately we have to actively train and remind people about phishing threats however it seems Sisyphean at times.
Other than spam or phishing attempts, no. We have educated people on how to recognize and report spam. We also have employees contact our IT support provider or admin if they are uncertain.

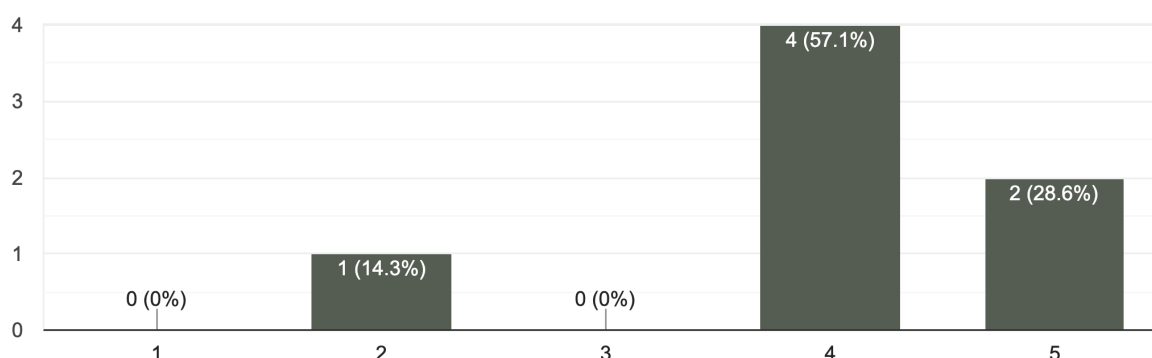
Electronic Interpretation Services

Which electronic interpretation service does your organization use?

We have a telephonic interpretation service
Boostlingo
Our fair housing newsletters are translated via HUD's authorized interpretation service. When our clients need interpretation and they speak a language not offered in-house by our team, we use Language Line or Pacific Interpreters depending on the funding source.
Google translate
Otter
Language Line


How satisfied is your organization with your electronic interpretation service?

7 responses



Please describe how satisfied you are with your electronic interpretation service. Include the name of your electronic interpretation service in your response.

Not sure if this is the same, but we use a telephonic interpretation service called Questel (formerly Morningside). They have been very responsive, are reasonably priced, and cover most all of our needs. We do not use them for ASL, but use a different program called RISE, I believe. Questel is very expensive for ASL.
Otter works really well but it's not perfect transcription because it's automated, so there are some imperfections.

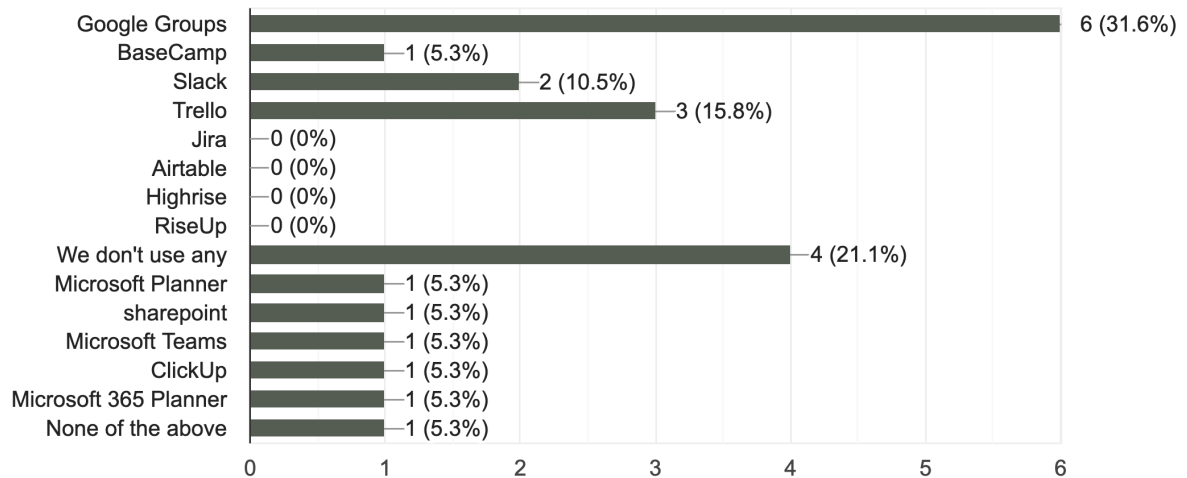


Not great because Language Line does not always provide reliable interpreters.

Miscellaneous Technology Services

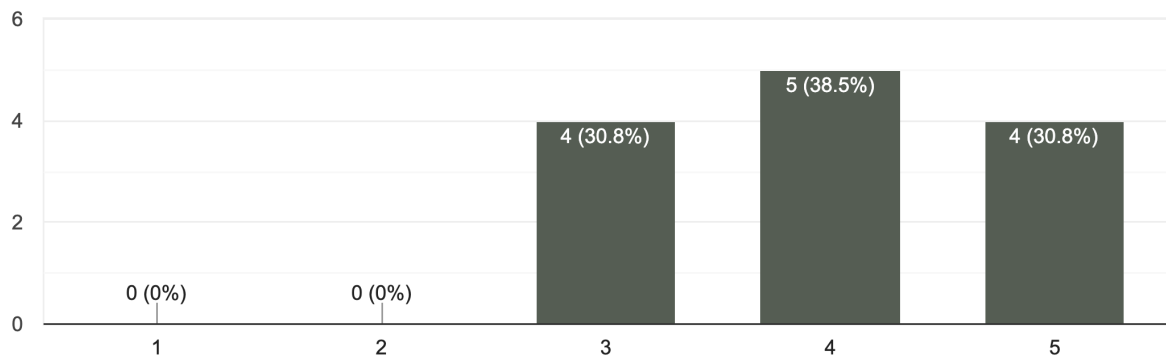
Which tools for project management, listservs, online groups, and online communication does your organization use?

19 responses



How satisfied is your organization with these tools?

13 responses



Please describe how satisfied you are with these tools. Include the name(s) of the tools in your response.

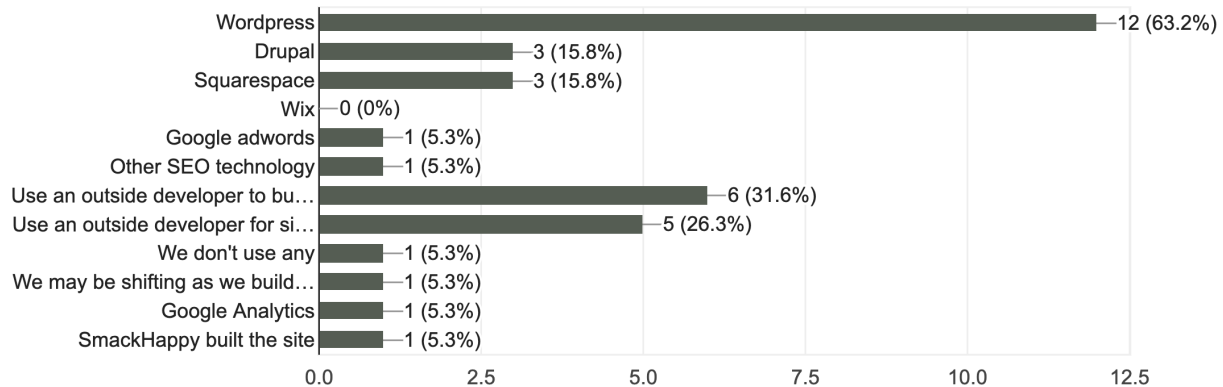
Basecamp is VERY user friendly.

Google groups cannot be use for litigation and client documents because of security issues
We really like Slack, or some of our folks like Slack. It would be better if it were office-wide, but not everyone has embraced it. I also wish it would incorporate better with some of our other technology. I am looking into ways to use other programs - maybe Teams? - for collaboration. But it would be something that the organization would need to set up and transition everyone to so that it became part of everyone's daily practice.
Trello and Planner are both great tools; Planner is fantastic since you can integrate it with Outlook Calendar, Teams etc and has many uses.
Google Groups allows us to email our entire office, certain departments/teams, or other staff groups without accidentally forgetting to add someone.
Trello is only used by the HR team. Google Groups is not used as much.
We just got started using Clickup, but it seems very easy to use so far, and is modular enough to be as simple or as advanced as we need it to be.
Planner: like the rest of the Microsoft 365 cloud package, this task management piece doesn't quite enough the same functionality as stand-alone offerings like Asana. It's workable for those who have adopted it but is missing some basic items that hopefully Microsoft will continue to refine.
Microsoft Teams: There are a lot of functionalities we don't understand and are not utilizing

Website Tools

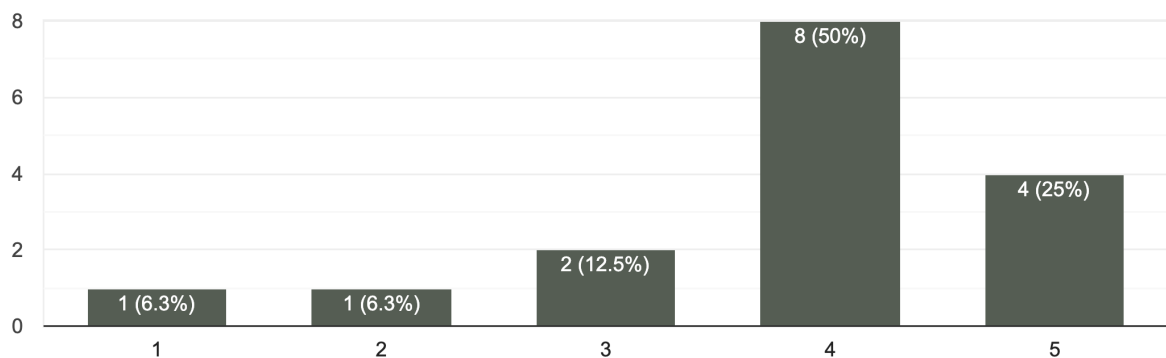
What platforms or technologies do you use for your organization's website(s)?

19 responses



Are you satisfied with your website tools?

16 responses



Please describe how satisfied you are with your website tools. Include the name(s) of the website tools in your response.

Squarespace is intuitive and easy to teach other non-IT folks to use.

Our site is a Wordpress site, but it was built and is managed by an outside vendor. The vendor is generally responsive, and we are working with them to undertake some additional innovations, like surveys on our site, password-protected pro bono portal on our site, and

hopefully soon, a real-time case list on our site pulling data from Legal Server (through an API). I think there's a lot more we could do with our website, but it takes a lot of attention, innovation, and knowledge.

We are currently moving to wordpress

We switched from WordPress to SquareSpace last year and it's now easier for our staff to make edits. The tough part now is customizing our website to look less "DIY."

Wordpress is good and lots of people know how to use it. It's not drag-and-drop, though, so takes more time to learn.

Wordpress: Wordpress is good and lots of people know how to use it. It's not drag-and-drop, though, so takes more time to learn.

Wordpress is good and lots of people know how to use it. It's not drag-and-drop, though, so takes more time to learn. We rely on developers to build, but we try to make it so we can then change / update on our own

Wordpress and Drupal gets the job done.

An outside developer supports with site maintenance and the tools that they use are satisfactory for our organization. Wordpress and Google Analytics have both been customized by our developers so they're very easy to use!

What other comments do you have about building and maintaining websites?

It is always a concern about HOW much legal information should go into a website and making sure who does any working on it doesn't stray into legal advice....

There's so much that can be done, but we need folks internally who know what they're doing, who know what's possible, and who know what to ask for.

Do not use Weebly!

I think there is huge variability in the quality of legal aid websites and it would be great if LAAC could play a role in highlighting the importance of this to legal aid community, especially connecting it to core mission of serving community.

Expensive! and we are always behind in updating our content

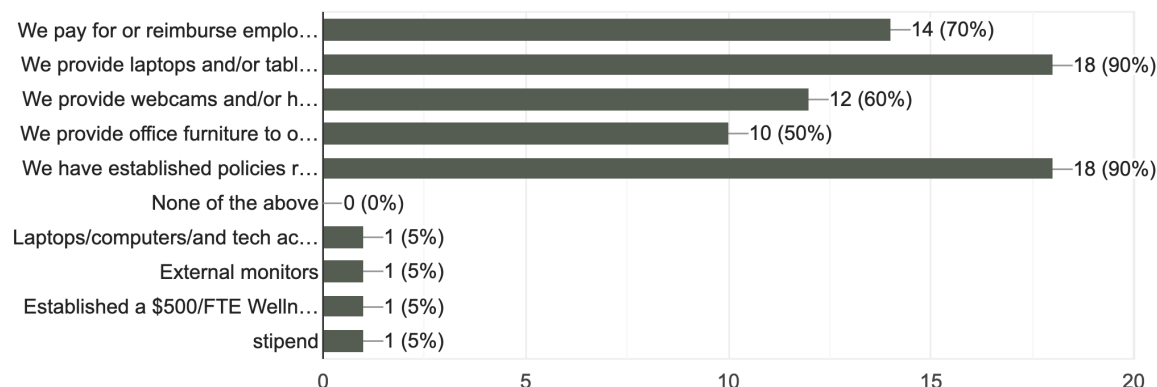
Use a professional as much as you can.

We used an outside developer to both build and maintain our website.

Remote Working

What type of support do you provide to employees to work remotely?

20 responses



What would your organization like to provide to employees who work remotely in the future?

Printers
Better access to remote document storage. I abhor emailing with or about clients. Have had too many situations where email can go wrong.....
We have been pretty flexible in terms of providing tools to employees who are working remotely, including ergonomic keyboards, larger monitors, etc. Some folks took their office chairs home with them. In the beginning, we did try to assess the appropriateness of everyone's home work environment and take steps to address any deficiencies. We haven't done as much of that recently.
A sense of community regardless of where they are physically working every day.
home workspace ergonomic assessments; an intranet style live workplace so remote workers can easily instant message each other, etc. in a secure way
We would like to provide sites to work in an office near everyone's home.
A fully remotely accessible drive to store and share information.
Ideally we would provide all tools needed to work remotely.

Our executive team has been very active in defining remote work policies, which continue to be a work in progress as pandemic evolves.

Continue our current pattern

Laptops, other hardware

More ergonomic equipment

headsets for private calls, and perhaps hotspots.

Permanent work from home options. More money for real workspaces at home. Buying work cell phones. Continued wellness funds to take care of themselves.

What have your employees communicated to you that they need or want in order to work successfully from a remote location?

Printers - which we provided - and new iphones - none of them like Android.

Sometimes basic office tools/supplies, like pens, paperclips, paper, etc. Having a way to print high volume is helpful, whether that's a printer in their home or access to a FedEx account so they can print to a nearby location (provided it's not confidential), and tech tools.

Generally staff have been happy with our remote work agreements

They need a good work space

Better laptops

Our executive team has done surveys and listening sessions. Staff clearly want clear protocols and the right technology and equipment. In general most staff seem to have most of what they need at this point, but there are always lots of specific areas where we are looking to improve.


It depends on the employee. Often they mostly benefit from having a second monitor at home, which we provide when requested.

better quality internet, better hardware.

Better furniture, but we feel limited by liability on this one

docking stations and monitors

1. Childcare
2. More space (one employee shares a studio with her partner; they take turns taking meetings in the closet)
3. Flex funds for teams to be able to have work meetings and team bonding activities outside office
4. We'll be doing more planning this summer for endemic COVID - ie, a future of permanent



remote and/or hybrid. We've been operating in temporary mode for two years. We expect to hear more through that process.


Conclusion

Is there anything else you'd like us to know about your current technology use or needs?

Our sites are all connected using SD-Wan
We would like to have a better and cheaper client management system. We have a small group - 14 including the office manager and intake specialist - our migrating is going to cost almost \$57,000!
We have a lot of what we need, but believe there's a lot more out there that we could take advantage of, both in terms of our work with clients but also our internal office management. I wish more of our tools could integrate with each other, and that we had someone internally whose job it was to focus more on tech tools and evaluation. That's a possibility now as we are hiring for related positions at the moment.
We would like to implement a text messaging platform but are not sure where to start.
It's super hard to not have a techie on staff. We have great IT outsourced support (Alternative Technologies of Berkeley), but really struggle with non-techies who wear multiple hats also needing to be Salesforce database admin; IT project manager; and all-around IT hub.
BTW, you didn't ask about finance tech, btw! We use Quickbooks and Bill.com.

What technology topics would you like trainings about?

I'd love training on Office365 tools - how to best utilize, especially in terms of internal collaboration/communication. I'd like to know if organizations are using HR software that includes online/electronic time off requests and timesheet approvals, as well as recruitment and hiring management. I explored a few but don't have any knowledge in that area. I don't necessarily need training, but would love more information on esignature tools and what folks have found is sufficient for the various court systems, especially organizations with immigration practices.
We would like to implement a text messaging platform but are not sure where to start.
Best practices for email encryption, cloud server, and the future of Windows 10 (and older versions)
Data security and data breach
I think LAAC could play a role in bringing resources developed nationally (e.g. LSNTAP) to greater prominence among the California Legal Aid community in addition to developing more resources. I think there is a need for general training on Technology Management and Security Practices and also scope for more specific/ad-hoc training on specific topics (e.g. (re)building websites, texting with clients, digital inclusivity (disability, language access). I sometimes think



the challenge is less about the the technology itself than the project-management processes required to efficiently/effectively procure and implement technology solutions in legal aid organizations.
We are always interested in learning about new methods of training users on effective ways to identify security risks in a way that does not shame them.
We surveyed our staff, and everyone always wants to improve their excel skills.
I don't know that more training is needed. I feel like there are many resources out there, paid and not paid. What's lacking is the bandwidth and resources to get trained and then implement changes and especially, new software and systems.