

Northwest Justice Project #948010
Technology Plan
2013



Revised April 2013

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Northwest Justice Project Technology Plan

Technology Leadership at Northwest Justice Project (NJP):

Mission: Northwest Justice Project’s mission is to secure justice through high quality legal advocacy that promotes the long-term well-being of low-income individuals, families, and communities. As a dynamic statewide law firm, NJP pursues its mission through legal advice and representation, community partnerships, and education to empower clients and combat injustice in all its forms. (Revised and Adopted November 2009)

Northwest Justice Project strives to identify, implement, manage, and support technology innovations designed to further NJP’s mission and improve client access to legal assistance.

- **Vision:** NJP’s employees will have access to the technology tools, training, and support that they need to most effectively carry out their responsibilities. All staff and managers will have an opportunity to participate in the management of existing technologies and the development of new systems. In addition, NJP will remain in a leadership role with regard to the use and coordination of technology within Washington’s Alliance for Equal Justice and will continue to be responsive to the advances in the use of technology by the courts and others that affect our practice.
- **Values:**
 - NJP strives to uphold the **Washington Access to Justice Technology Principles** through which we can use technology to give everyone fair access to the justice system in Washington State and beyond. A summary of each principle follows:
 - **Openness and Privacy:** Technology in the justice system should be designed and used to meet the dual responsibilities of being open to the public and protecting personal privacy.
 - **Maximizing Public Awareness and Use:** The justice system should promote public knowledge and understanding of the tools afforded by technology to access justice.
 - **Best Practices:** Those governed by the principles must use ‘best practices’ to guide their use of technology.
 - In addition to the principles above, NJP adheres to the following guidelines:

- Technology should always serve the legal and operational needs of NJP in order to most effectively serve our clients and support the quality of our work
- Training and support are not optional
- Courtesy, Patience and Responsiveness (CPR) are critical to effective technology planning, implementation and support
- It is important to share knowledge with all of the civil legal services providers, large and small, in Washington's Alliance for Equal Justice as well as nationally.
- Day to day technology related responsibilities of all employees are guided by NJP's policy: The Appropriate Use of Information Resources.

Process/History

NJP's technology plan was prepared by the Director of Administration and the IT staff for review and adoption by program senior management. LSC's "Technologies That Should Be in Place in a Legal Services Office" was consulted as a guideline for this plan. Any technologies thought appropriate for NJP and not in place already are noted in the Goals for 2012-2013 section. The Director of Administration assembled a Technology Plan Review Committee comprised of an advocacy coordinator, a senior attorney, two staff attorneys (branch office and CLEAR), a legal assistant and a member of the accounting department to review the plan. Input received from the Committee was integrated into the original plan prior to circulating it to all staff for comment and subsequent adoption by management in fall 2009.

A new Technology Workgroup was formed in 2010 to assess NJP's present technologies and identify gaps. This exercise followed the adoption of the new mission statement and the belief that NJP's technology should reflect its identification as a dynamic statewide law firm. This work group met frequently during 2010- 2011 and issued a report on suggested improvements to NJP's technology especially in the areas of collaboration and the sharing of resources. As a result of NJP's 2011 strategic planning effort, a newly expanded Information Management Workgroup has been formed to work on this project with a SharePoint consultant. This was made possible by a TIG grant that began January 2012. NJP's Information Management system, named IKE (Information, Knowledge, Etc.) launched in fall 2012. Integration with Legal Server should be complete by spring 2013.

Program Snapshot

NJP is a not-for-profit corporation established in 1995 to provide civil legal services to low income persons throughout the state of Washington. NJP is the recipient of all of the federal Legal Services Corporation funds and contracts for state civil legal aid funding with the Office of Civil Legal Aid.

As Washington's largest staffed civil legal aid program, NJP provides the underlying infrastructure and support for Washington State's Alliance for Equal Justice.

NJP has a very diverse staff of 180+ employees, including over 100 attorneys, working in 17 offices throughout the state of Washington. Over one third of NJP's staff is bilingual. NJP has been providing services (as NJP) for over 17 years and is the largest provider of free civil legal help in the state. From its inception, NJP has been at the forefront of technology with one of the nation's busiest statewide public legal services website and largest statewide coordinated intake, legal education and referral hotline. Please visit <http://www.nwjustice.org> for more detailed information about our program.

- **History of Technology Support:** NJP outsourced its technology needs from 1996 until 2004 when the first Network Administrator was hired. Although the quality of our technology consultants was excellent, they were not on site and routine maintenance or system monitoring was inconsistent. In addition, NJP was beginning to expand, resulting in a need for readily available helpdesk support. NJP presently has two Systems Administrators in charge of maintaining the security of our data and networks program wide. Since 1997, NJP has also employed a full time webmaster and publications manager charged with maintaining both the NJP program site www.nwjustice.org as well as the public site, www.WashingtonLawHelp.org (which offers free downloads of publications and forms to the general public) and www.AdvocateResourceCenter.org , the secure statewide advocate site. NJP also employs a part-time attorney as an editor to update forms and legal education materials on the public LawHelp site as well as a part-time videographer to develop public education videos.
- **2005-2007 Statewide Regional Planning:** NJP and its partner organizations participated in an extensive statewide technology planning process which resulted in a technology plan with two vital statewide technology initiatives: (1) to have all providers use the same web based case management system (Legal Server) by 2010 (2) to be able to connect all partner locations through videoconferencing. (completed)

Washington State Technology Plan for Civil Legal Services

The Access to Justice Board approved the WA State Technology Plan as part of the state planning process. Members of the committee who drafted the plan were representative of various partners and Northwest Justice Project was pivotal in its creation. The objectives below illustrate the state's support of technology and reflect NJP's vision as well. As NJP is the largest provider in the state, much of the responsibility for carrying out this state plan is dependent on NJP's ability to design, implement and maintain its technology infrastructure, which in turn provides the basis to support alliance-wide progress in implementing the state plan.

The state tech plan strives to:

- **Improve Program and Office Efficiency**

- Enhance the ability of the legal services delivery system to respond to the most compelling needs of eligible clients by improving the effectiveness and efficiency of legal work within programs.
- **Improve Collaboration and Access to Information for Advocates and ATJ Network Members**
 - Enhance coordination and communication among legal services providers, volunteers, community advocates, and others by using compatible systems and technologies throughout the state. (All of the providers use Legal Server.)
 - Strategically utilize all components of the justice, social service, and information service systems to build a communication and service "web" within the state (e.g., schools, libraries, courthouses, social services agencies).
- **Increase Access to Information and Services for Low-Income and Vulnerable People:** Provide expansive geographic coverage to maximize the opportunity for clients throughout the state to receive timely, effective, and appropriate legal services; enhance delivery system responsiveness to changing environmental circumstances and clients' needs; overcome barriers and obstacles facing poor and vulnerable people such as physical or mental limitations or disabilities, language, age, and geographic isolation; and empower clients by providing them ready access to available resources via computer, telephone, or other communication devices.

Budgeting for Technology

NJP continues to budget for a technology staff consisting of two network administrators, one full time website/publications manager, and a part time editor/publications content coordinator and videographer. The NJP annual budget allocates funds for technology training, replacement, and updating of computers and servers, renewal of software licensing, software updates, and ongoing maintenance of both hardware (computers, routers, copiers) and software (General System Software, Legal Server Case Management Software, and Microsoft Great Plains Accounting Software). In addition, a TIG proposal for 2012 included a SharePoint consultant to work with the NJP tech staff to develop the information management system, IKE.

Past Grants for Technology Projects

NJP has actively pursued special grants for technology and has been a leader on many new technology initiatives. Our technology innovation efforts have been made possible by our commitment, community wide technology planning involvement, and securing special technology resources as follows:

TIG (Technology Initiative Grants awarded by Legal Services Corporation):

- Three Technology Initiative Grants (TIGs) from LSC for website development of WashingtonLawHelp and the AdvocateResourceCenter.

- One TIG grant for telephone system enhancements relating to the centralized hotline.
- One TIG grant for experimentation with electronic transfer of referral data using XML.
- One TIG grant for the development of four (4) document assembly Hot-docs/A2J interviews on the public website.
- One TIG grant for development of a limited online intake application for CLEAR using an A2J guided interview and Legal Server implementation.
- One TIG grant for the development of a “tool box” of materials to help advocates represent LEP clients through working with interpreters and translators in addition to the development of an online statewide interpreter database.
- An initial one year TIG grant for NTAP (National Technology Assistance Project) to be located in-house at NJP in 2011. A renewal grant for 2012 and 2013 was funded in 2012.
- One TIG grant for building an internal information management system. This proposal included a SharePoint consultant and integration with Legal Server (our CMS). Partners included Microsoft and the University of Washington Information School.
- 2013 TIG grant: Funded the NTAP webinar series through 2013.
- 2013 TIG grant: Funded to develop a “trending” function within Legal Server to help in data analysis and advocacy direction.
- 2013: TIG grant funded to develop an outreach program for the deaf and hard of hearing using a videophone linked directory to a CLEAR (hotline) lawyer who is fluent in American Sign Language.

Misc. grants:

- Numerous annual small grants from the Washington State Administrator of the Courts (AOC) to subsidize NJP development of family law content on the public site.
- Recruitment of AOC as a financial partner on the TIG hot-docs document assembly project.
- One grant from the Office of the Attorney General that included resources for content development in the area of consumer law for the public website.
- Critical role in the year long request for proposals (RFP) process, evaluation process, procurement process, development process, and final deployment of the Legal Server case management system in Washington. This effort was in concert with a host of Access to Justice Community Partners and funding was secured from the Office of Civil Legal Aid (OCLA) and the Legal Foundation of Washington (LFW).
- Developed proposals, specifications, and acquisition of technological infrastructure for Alliance-wide videoconferencing capacity which was successfully implemented in 2009.

- Justice.net: NJP received part of the large federal stimulus money awarded to the State of Washington. Our part of the grant is known as Justice Net and involves the production of 12+ videos in Spanish and English including a video on the use of WashingtonLawHelp.
- ATJ Board- small grant to develop additional hot docs forms in the area of housing.

Current Technology Infrastructure 2013

NJP has 17 offices throughout the state. The largest office is Seattle, which houses our CLEAR hotline, all administration and accounting staff, as well as the largest staffed field office. Seattle also houses smaller grant based projects such as Veterans, RISE (Re-entry), Medical- Legal Partnership, Foreclosure Prevention and Foreclosure Consequences. Each of the branch offices is connected to the Seattle office by a permanent site-to-site VPN tunnel. These tunnels are primarily used for access to the Exchange and SharePoint servers, (located in Seattle) and replication between domain controllers, but they are also used for file sharing and remote network management by the IT staff. In addition, there are several site-to-site VPN tunnels in place between branch offices (bypassing Seattle) for file sharing and other tasks. Such tunnels can be implemented as needed.

- **Seattle Configuration**

The Seattle office currently has two Internet connections in place. The primary connection is a bundle of eight T-1s (12 mbps bidirectional). The Seattle office will be migrating to 25 mbps Ethernet over copper in the spring of 2013. In addition, there is a backup DSL connection from a different provider. The ASA router is configured to automatically failover to the backup DSL Internet connection in the event that the T-1 goes down. The following services thus remain available in the event of an Internet outage:

- Internet access for the Seattle office (including the CMS which is essential to the hotline).
- VPN tunnels between branch offices and Seattle office.
- Access to the exchange server for the entire organization.
- Ability to send and receive external emails.
- Outlook Web Access (available only via IP address, as DNS does not support a backup IP address for an A record).

Seattle has a mixed environment of physical and virtual servers. There are a total of eleven physical servers, and nine virtual servers.

- Three of the physical servers are running server 2008 and are configured in a Hyper V failover cluster.

- Two of the physical servers are running server 2008 and acting as storage for our Hyper-V hosts. They have Starwind installed on them keeping the data on the two servers mirrored.
- One Physical server is running Server 2012 and acting as primary DC. It also hosts some of the Seattle Users files.
- One Virtual Server is running Server 2008 and is acting as the Backup DC.
- One physical server running server 2003 and acts as file, print, and DHCP server.
- One virtual server running server 2008, hosts our SQL Database. That database is used for Dynamics (accounting software) and SharePoint. One physical Dell server running Debian Linux, which simply receives a copy of our CMS (Legal Server) from its hosting facility in real time as a safety measure.
- One virtual server running Server 2008 hosts our online Document Repository (SharePoint).
- One physical server running Windows 2012 server hosts our Disaster Recovery software (Dell AppAssure).
- One physical server running server 2012 acts as a storage device for the disaster recovery server.
- One virtual server running Windows 2008 server runs our Antivirus software (Eset).
- One virtual server running Ubuntu (Linux) runs our workstation imaging software (Fog).
- One virtual server running Server 2008 runs various scheduled tasks and Script Logic (A program used to generate logon scripts for configuration of user workstations).

Our backup system is AppAssure which takes hourly snapshots of all of our key servers. Using this dedicated storage server, NJP can save up to three months' worth of snapshots while at the same time replicating a copy of all snapshots off-site at our branch office in Spokane. Either location can recover and restore any of the servers being backed up. The replication site, Spokane, has the identical servers as our Seattle site. Spokane was chosen as the replication site based on its location away from any earthquake zone.

As part of our videoconferencing system, the Seattle office hosts a Polycom videoconference bridge with the capacity to host up to 20 total sites in multiple

simultaneous conferences. This is necessary for any videoconference of three or more locations. The bridge is available for all NJP offices, plus our partners in Washington's Alliance for Equal Justice, who have procured the required videoconferencing equipment.

- **Branch Office configurations**

- Each NJP branch office accesses the Internet through a DSL or cable, provided by either the local phone company or Comcast, depending on what is available locally.
- All offices have Cisco ASA router/firewalls, which are also used to create secure tunnels between the branch office and Seattle (and any other branch office as needed).
- Each branch office has a Windows 2012 server (upgraded in 2013) which acts as a file, print, DHCP, and DNS server, as well as a domain controller. All sites are on the same domain - DNS and Active Directory replication with Seattle over the VPN tunnel occurs every three hours.
- Files on the branch office servers are backed up every night using an online service called Mozy. Information has successfully been restored from Mozy.

- **Case Management System**

- The case management system, Legal Server, is an online application used by all staff for comprehensive case management and timekeeping, and complies with all of the functionality requirements in LSC's document, Technologies That Should Be in Place in a Legal Aid Office Today. Legal Server is backed up at a co-location facility in Chicago as well as being backed up daily on a local back-up server in Seattle. NJP has successfully integrated Legal Server with SharePoint for information management and A2J for online intake.

- **End user equipment/desktop configurations**

- Desktops: NJP updates and replaces desktops using a systematic three to five year rotation period. Desktops are covered under standard manufacturer three-year warranties. Currently NJP procures its desktop computers from Dell in order to take advantage of its consistent discounted pricing and to maintain equipment standardization.
- Base Software: NJP desktops are standardized using Windows XP Pro and Windows 7 as they are replaced, Microsoft Office 2010, PDF Creator, Adobe Reader, ESET Anti-virus, 7-Zip, as well as Mozilla, IE, and Chrome browsers. To stay consistent with every install, the technology staff uses FOG imaging software to load up-to-date and clean images on every new installation or re-deployment. We are also using Windows Deployment Services to load and deploy new Windows 7 machines.

- Anti-Virus: ESET is installed on every computer connected to the network and is managed and monitored centrally by the IT staff.
 - Anti-Spam: NJP outsources this function to Google (formerly Postini).
 - Litigation management: Where applicable, Case Map and Adobe Professional are used by staff.
 - All machines are kept updated using Microsoft's automatic update function.
 - For added security, users are not administrators of their NJP desktops and thus are restricted from installing any software on their computer.
- Printing/Copying: NJP deploys Standardized HP Network printers that are located at strategic locations around each office. Copiers are standardized Canon copiers with network printing and network scanning.
- Paper documents are scanned to PDF using copiers or fax machines. Electronic documents are converted to PDF using PDF Creator, which is loaded on all PCs.
- All NJP offices are provided with an In Focus projector and a shared laptop with a wireless card for presentations, use at conferences, etc. All offices have a digital camera. Some of the rural offices have a program cell phone to be used on outreach assignments away from the office. These items are kept locked in a cabinet or closet and must be checked out.
- All NJP offices have been provided a videoconference system, including a Polycom codec and a large television or projector and screen. Any two offices can "video call" each other (or locations outside of NJP) directly, or can schedule and access the bridge (hosted in the Seattle office) for videoconference calls of more than two locations.
- Support Calc and Forms Plus, Washington-specific family law software, are installed on many NJP machines as needed and maintained by the Helpdesk.
- **Remote access capabilities**
 - All employees can access email remotely via Outlook Web Access.
 - All users can access the Legal Server, the Case Management System remotely.
 - All users can access IKE remotely.
 - Management and tech staff have been provided with a VPN client to allow full remote network access. We currently do not provide full remote access to all staff due to security concerns as well as the considerable time it would take IT staff to setup and troubleshoot access for a wide variety of non-standard home computers.

In addition, any employee granted VPN access is required to sign a VPN agreement for documentation purposes.

- If employees need to carry files offsite, they are furnished with USB thumb drives. For client or other confidential files, employees are instructed to use encryption software pre-loaded on all thumb drives.
- **Voice Technology**
 - The Seattle office (which includes the CLEAR hotline) has an older, but sophisticated, Lucent Definity phone system. Programming or vectoring the system can be done on-the-fly by NJP staff. This flexibility is very important for monitoring a busy call center using 30 lines over multiple T-1s. The Definity system is complemented by an Intuity voice mail system.
 - NJP is planning on replacing the Definity system in the next year with a more modern and efficient Unified Communication System combining Lync and a sophisticated call center software (2014 TIG Proposal). This system would encompass the Seattle office as well as all branch offices.
 - The Seattle office houses the CLEAR hotline. The Definity system allows for the following with regard to the agents (screeners and lawyers) who work in the call center: agents are profiled by legal specialty, geographic assignment and language; calls are sent to these profiling groups; all announcements and programming is mirrored for English and Spanish speakers; the queue can be controlled on the fly to gradually clear it out toward the end of the hotline hours; calls are screened by non-attorney screeners and placed back into queue, voice mail box, or a callback system. Programming is done in house. All NJP branch offices are equipped with Toshiba phone and voice mail systems allowing for field office standardization of phones, support, and training. All systems include such features as Auto Attendants, do not disturb, music on hold, call forwarding, etc. Any major changes in programming are done by the vendor who normally dials into the system.
 - NJP owns five “office assigned” cell phones utilized for business use only mainly during farm worker outreach and offsite advocacy in rural areas of the state. Cell phones are kept in locked cabinets in the offices and are signed in and out. Cell phones are also used for texting clients.

Current Technology Support

- **Network/Systems Administrations**
 - All network and some voice administration duties are handled by the NJP IT department made up of two network engineers. The IT staff handles administration of the Windows domain (Active Directory, Group Policy, DNS, DHCP, etc), networking-related duties (configuration, administration and monitoring of routers and switches; handling outages; cabling; etc), and server deployments. In addition, they maintain the statewide videoconferencing system,

deploy new desktops/laptops, and perform a host of other day-to-day technology functions and troubleshooting efforts. NJP has an ongoing relationship with an outside consulting firm, which is consulted or brought in for advice and assistance as needed or for larger projects, system modifications, and installations.

- **Technical Support/Helpdesk**

- The IT department (same two network administrators) also provides the helpdesk function for the NJP staff. The Director of Administration and Director of Strategic Initiatives are also available for troubleshooting certain hardware and software issues. NJP users can receive technical support by emailing NJP Helpdesk, which creates a ticket in our Spiceworks ticketing system. The IT department has remote access to all desktops and servers. The IT staff also provides trainings and presentations, when applicable. The outside consulting firm is also on call and available for assistance when NJP IT staff members are unavailable.
- Since April 2011, the NTAP Coordinator has been housed at NJP and serves as an additional resource for the tech staff.

- **Websites**

- Since 1997 NJP has employed a full time webmaster/publications manager in charge of both the NJP program website, WashingtonLawHelp, and the Advocate Resource Center site.
- The NJP webmaster was also responsible for updating the Hot Docs forms completed in early 2010. This TIG grant consisted of the four A2J interviews currently posted on the public site.
- NJP redesigned its public and intranet program site, www.nwjustice.org, in 2010, switching it to Drupal. It adopted the new LawHelp template in 2013.

- **Software Support**

- Case Management System: Legal Server updates, programming, and other changes are initiated via a long-term maintenance contract with the Legal Server developer PS Technologies Inc. and are monitored by NJP. IT staff and other senior management are designated legal server administrators who make minor changes to the program and test any new functionality.
- Accounting software: NJP uses Microsoft Great Plains (with FRX reporting) accounting software for its general ledger, accounts payable and bank reconciliation, and reporting needs. Our fixed asset and depreciation software platform is Depreciation Solution. NJP maintains ongoing support and service relationships with qualified and authorized vendors of these accounting products and our IT department works with these outside vendors for any necessary maintenance, troubleshooting and annual software updates.
- The video conferencing bridge is under maintenance with Polycom via a secondary vendor.

Training

NJP considers technology training of staff essential.

- Wednesday Wisdom: NJP, as part of the Washington State Plan for the Delivery of Civil Legal Services, has the primary responsibility to provide and/or coordinate training for members of the Alliance. To insure that staff are offered technology trainings, the Wednesday Wisdom (formerly called Friday Fundamentals) program was begun by NJP in December of 2006 and continues today. One hour technology trainings are offered on the second Wednesday of each month to Alliance legal services staff in Washington State over online conferencing software such as Join Me. Trainings cover a host of specific functionalities within common applications (i.e. Mail Merge, Table of Authorities in Word; Contacts in Outlook, Using SurveyMonkey, Legal Server, etc.). The trainings are presented by an NJP staff member, outside consultants, or PSTI (Legal Server) trainer. Alliance staff are surveyed annually to establish the training curriculum for the coming year.
- NJP circulates all NTAP online training announcements.
- Case management system training: NJP launched the Legal Server case management system on June 6, 2008. All staff were required to attend two trainings either in person (Seattle only) or over GoToMeetings. A third training was optional. In addition to the formal trainings, 'open' GoToMeetings and conference calls were set up weekly for program wide Q&A's during the first month of use. All of Washington's Alliance legal services providers are now using Legal Server. Since 2009 the Wednesday Wisdom schedules have included many trainings specific to Legal Server. A short introductory video on Legal Server was created in 2012. A secondary video specifically on closing cases and CSR will be developed in 2013.
- In-person training: Although most of our training is over GoToMeeting, when warranted, in-person technology training in Seattle is offered to NJP staff. The large conference room can be re-configured into a classroom with computers for hands-on training.
- 2012- 2013 NJP staff was trained on using SharePoint in 2012, which forms the backbone of NJP's information management system. More advanced training is planned for 2013 once the integration with Legal Server is complete.

Online Technology and Websites

- **Online surveys:** NJP has two Survey Monkey accounts, both of which are used heavily. One is limited to administrative staff (used for healthcare surveys, etc), and the second is for all NJP staff. In addition, there is a Survey Monkey link on the bottom of every page of the statewide public website (www.washingtonlawhelp.org), which yields about 1,000 surveys per year giving us valuable information regarding usability, suggestions for additional content, etc. A Survey monkey link is also provided to applicants who complete the online intake. NJP received over 1000 responses the first year.
- **Join.Me:** NJP is a frequent user of Join.Me with three accounts- one for staff, one for NTAP, and the other exclusively for the IT department to use for troubleshooting desktops, etc.
- **WashingtonLawHelp:** NJP's statewide website is extremely popular, with over 298,000 unique visitors and 2.6 million page views in 2012. The NJP site has been the hub for all legal education publications since the first NJP website was developed in 1997. The new online intake system will refer users to the statewide website WashingtonLawHelp for further legal information. The LawHelp site contains over 800 legal publications, with 675 in English and 146 in Spanish as well as 23 other languages. The site also offers four A2J Author interviews. The NJP Spanish mirrored site had over 30,000 page views in 2012.
- **Advocate Resource Center:** The Advocate site (ARC), is a secure site available to those persons representing low income people in Washington. All of the 26 statewide substantive law task forces also run their listservs thru the ARC technology. The ARC is also the focal point for law students from Washington's three law schools to find out about civil legal services jobs, fellowships, conferences, etc. In addition, it serves as the focal point for the Volunteer Lawyer Programs Coordinators to post information regarding their programs.
- **NJP website:** www.nwjustice.org was totally revamped in 2009/2010. There were over 95,554 unique visitors in 2012, with 367,000 page views on the public site. The NJP intranet site, limited to staff only, was expanded to include a calendar, forms bank, and staff directory as well RSS feeds and improved HR/benefits, advocacy, and technology sections.
- **Legal Server:** Online outlines and questions with substantive and NJP priority information are available to all intake screeners and other staff through our case management system. In addition, NJP staff have the option of sending recommended publications and forms present in Washington LawHelp thru the Legal Server CMS. In addition, cases referred to other providers in Washington are electronically transferred.
- **CLEAR*Online:** NJP developed an online intake system that launched Feb. 14, 2012. The goal at launch was to offer an additional access point to CLEAR for those persons with targeted high priority legal problems involving denial of benefits and eviction. A link to a user survey is given to all applicants who have completed the application or exited early. During the first year, 1293 clients were served by NJP who initially accessed our services through the CLEAR*Online application.

- **NJP's YouTube channel:** NJP created a non-profit YouTube channel in 2012 to house our videos. There are 12 public videos in English and Spanish which have received over 14,000 views. In addition, NJP has a Vimeo channel for private videos (accessible to NJP staff only) including four NJP orientation videos, the IKE launch video, and our Strategic Advocacy Focus video.

Disaster Recovery Summary

- This summarizes steps NJP has taken to protect our information and be able to quickly rebuild our systems in case of a disaster. The following information has been described in more detail throughout the plan.
- The primary servers hosted in Seattle (Exchange, SharePoint, SQL, Dynamics) are backed up on an hourly basis and replicated to Spokane in real time. There are duplicate replication servers built in Seattle and Spokane. Either can temporarily host the down servers until the original can be repaired. In addition, all Seattle data is backed up and current versions accessible in Spokane as part of the AppAssure backup installation.
- All branch office data is backed up online nightly. Successful backups are verified weekly.
- Testing of restoration of data from both the online system and the Seattle backup drives has been successful.
- NJP instituted a SAN infrastructure that provides real-time data redundancy and availability using a combination of hardware and Star Winds software.
- Successfully converted the original DSL in the Seattle office to be used as an instant back up to the Internet in case of a T-1/Ethernet outage.
- If Seattle domain controllers went down, it would be relatively easy to restore active directory, as all NJP branch office servers are also domain controllers.
- The case management system, Legal Server, is an online application and is backed up at a co-location facility in Chicago as well as being redundantly backed up in real time on a local back-up server in Seattle.
- Voice: NJP's voice mail system has an automatic tape backup. All phone system programming and announcements are documented and kept up-to-date. New tapes purchased 2010.

Security of Client Identifying Information: Laptops, Portable Storage Devices & Home Computers (Excerpted from NJP Personnel Manual)

Program laptops and storage devices are available for employee use. Staff are instructed to make sure that all client identifying documents are saved as password protected documents when putting them on the laptop, portable storage device, or a personal home computer. (To password protect a document go to File, Save As, Tools in upper right corner, Security options, password to open). REMEMBER your password- it is not possible to open a protected document without the correct password. Client information should be moved (cut and paste) from the portable device, not copied, to assure its removal from the portable device. This is extremely important as these small devices can be lost or stolen.

APPROPRIATE USE OF INFORMATION RESOURCES

(Excerpted from NJP Personnel Manual)

General Principles: Not all the “do’s” and “don’ts” regarding the appropriate and ethical use of NJP’s information and communication resources can be reduced to writing. The best and, indeed, ultimate guide to appropriate use of NJP-provided equipment, software, and online facilities is this policy statement together with basic common sense and integrity.

Equipment Use: NJP provides access to email systems and the Internet for the conduct of NJP business. Although equipment furnished by NJP is obviously intended primarily for NJP business use, it is recognized that employees and volunteers may make reasonable, limited personal use of computers and other equipment. Subject to the blanket prohibition on some uses (see below), you may make limited and occasional personal use of NJP computer technology so long as it involves minimal program time and a negligible cost to the program. As an example, computer resources may reasonably be used in the limited way employees use office telephones to make occasional short personal local calls. Outside of work hours, you may also make reasonable personal use of computer technology in order to increase your skill and proficiency with the technology, provided there is negligible cost to the program.

However, the Internet and email systems and software and hardware are NJP property; all messages composed, sent, or received on the email system are and remain NJP’s property. NJP employees have no expectation of privacy in their Internet use through NJP resources. In addition, employees are reminded that email, website, and voicemail communications, are stored in NJP’s system and can be traced to their author. NJP has the right to review all stored electronic material. Such communications may also be retrieved and may be subject to discovery in the event of NJP-related litigation. Those who are unsure whether an intended use is appropriate are strongly urged to consult with the Director of Administration or other responsible supervisor.

Program resources may never be used to engage in any solicitation of funds not related to work activities, or to support, promote, or engage in commercial, political, or religious activities not related to work activities. Program resources may never be used to support, promote, or engage in any obscene or illegal activities. Intentionally accessing, downloading, or installing any fraudulent, harassing, threatening, or obscene material not related to work activities is prohibited.

Email: As is specified above, the Internet, email systems, and software and hardware are NJP property; all messages composed, sent, or received on the email system are and remain NJP's property. NJP provides access to email systems and the Internet for conduct of NJP business. NJP employees have no expectation of privacy in their Internet use through NJP resources and NJP has the right to review and retrieve emails for any reason.

Unless clearly privileged, email messages are subject to discovery in litigation, whether or not they have been "deleted". Once email is sent to or forwarded to persons outside NJP, it is no longer within your control; both confidentiality and intended limited distribution may be compromised. An email is exactly like a letter (only faster) and should not be sent if a written communication is not the appropriate form of communication. Caution should always be used when sending confidential or sensitive information via email. The privacy and integrity of an email message cannot be guaranteed, any more than the security of a paper letter can be guaranteed. Also, once an email message is created, there is no guarantee that attempts to erase or delete it will be effective.

Professionalism: Email should be drafted in a professional manner, and sarcasm and irony should be avoided. Email is a "flat" medium best suited to the simple exchange of information, rather than highly nuanced, multi-sided, or complicated communications.

Blind copies discouraged: Although the email contains a function that allows you to send blind copies of emails, this feature should be used only in the most urgent circumstances. Sending blind email copies incurs a risk that the recipient could "reply to all," including blind recipients; this can be unfair to the person who does not know to whom the reply will go. A better practice for blind copying emails is to send the email and then separately forward a copy of the email "FYI" to the attention of the person to whom you wish to send the blind copy.

Record Keeping: Official records or required documentation should not be maintained merely as an email message on a server or computer. A printed email message may serve as an adequate record in some circumstances.

Product Ownership: Any software program, text, graphical material, or data you develop as part of your job is the property of NJP even if the development occurs after business hours.

Software Acquisition: Any software (including shareware or freeware) installed or used on NJP-owned equipment, must be approved by the Director of Administration. Downloading or installing viruses, inappropriate material, or unlicensed software is prohibited.

Licensing Agreements: NJP's policy is to adhere to software licensing agreements. Most agreements prohibit making copies of programs beyond legitimate backup needs. Employees and volunteers are not permitted to use NJP's equipment to make unauthorized or illegal copies of licensed software. If the licensing for the software permits, the Director of Administration may approve the loading of NJP-owned software on a personal computer if used for NJP work while out of the office. Any approval will be on the condition that the NJP software is uninstalled from the personal computer upon request.

Copyright and Trademark: Copying, transmitting, or downloading copyrighted information or

material must comply with applicable federal and state laws. For information on the company's license to copy certain copyrighted materials, contact the Director of Administration. Any use of a registered trademark requires express permission from the owner.

Security Controls: All employees and volunteers are responsible for ensuring that both the electronic and paper files you work with and manage are adequately protected against unauthorized access and loss. The following general procedures should be employed:

Computers must be logged off the network or powered off when you leave the office for the day, or for extended periods during the day, to prevent unauthorized usage and to maintain computer functions.

Security of Client Identifying Information with regard to office laptops, portable storage devices and home computers: Please make sure that all client identifying documents are saved as password protected documents before putting them on the laptop, portable storage device, or a personal home computer. (See Employee Responsibilities and Obligations section of this manual).

Nightly backups are performed automatically. Do not store any important work related documents on the local "C" drive of your computer as this drive is not backed up nor is it password protected. Your user ID and password are for your use only. You are responsible for all system access made through them.

Memorize your password. Do not disclose it or store it in written or electronic form. Do not check the box "remember password" on initial logon.

Change your password at least every 180 days (or at such time as requested by the system) or any time you think it has become known to others.

Do not attempt to gain system access by using anyone else's user ID and password.

If you discover missing hardware or software, or if you have reason to suspect any unauthorized use of your PC or one of NJP's laptop computers, contact the Director of Administration immediately.

Virus Protection: All PCs owned by NJP or in contact with NJP's systems must actively employ virus-detecting software. This software will be utilized to perform a virus check before loading any information, data, or software acquired from external sources. Branch offices are subject to the network virus software in Seattle and updates are downloaded automatically through the VPN connection. The Director of Administration or Network Administrator should be contacted immediately when a virus is encountered.

Trade Secrets and Confidentiality: NJP's proprietary business information must not be divulged to outside parties. Employees and volunteers who have access to confidential or sensitive programmatic information are required to comply with established communication standards. Internal confidential email communications, including those protected by the attorney-client privilege, should not be forwarded to others outside NJP who are not also subject to the obligation to maintain confidentiality. Any written, electronic, or oral transfer of confidential programmatic

information should be subjected to special security arrangements, in consultation with the Director of Administration.

Controversial Material/ Inappropriate use: NJP is strongly committed to providing a workplace that is free of discrimination and harassment, including harassment based on race, age, gender, national origin, physical or mental disability, sexual orientation, or any other protected category. Use of information resources inconsistent with this goal is prohibited and will lead to disciplinary action.

Policy Violation: Any employee or volunteer's misuse of program resources can expose NJP to serious legal and ethical consequences. As stated above, violation of these program policies shall therefore be cause for disciplinary action, which may include dismissal. If you have questions or concerns regarding any aspect of this policy, please contact the Director of Administration.

File Retention and Destruction: The Director of Administration will be responsible for general file retention and destruction. Any and all material that may be related to a client complaint, malpractice claim, or equal opportunity claim against NJP or its employees must be retained until the complaint or claim is resolved. When a complaint or litigation is threatened by a client no documents or files pertaining to the client's case or file may be destroyed. There shall be no bad faith destruction of material. (See full procedure in the Administrative Manual.)

Implied Consent: By using the email, voicemail, computer systems, Internet access and other electronic communications systems provided by NJP, it is understood that employees and volunteers:

- Agree to comply with all limitations on the use of email, voicemail, computer systems, and electronic communications systems.
- Agree to comply with all limitations on the use of NJP-provided Internet access.
- Recognize that NJP supplied access to the Internet, email systems, and software and hardware are NJP property; all messages composed, sent, or received on the email system and NJP servers are and remain NJP's property.
- Recognize that NJP employees have no expectation of privacy in their electronic communication and Internet use through NJP resources and NJP has the right to review and retrieve emails for any reason.

Change Management

When making technology-related changes, it is important to consider the effects of the proposed changes both on end users as well as on the existing IT Infrastructure. In general, it is important to keep open communication lines with supervisors and other stakeholders throughout the process.

Plan the Change:

Determine the following information during the planning process:

- Who is responsible for the change.
- What effect the change will have on network infrastructure.
- What effect the change will have on end users.
- When the change should occur, based on the following factors:
 - When will the change have the least chance of interfering with operations?
 - Will appropriate support staff be available?
- Why making the change is important.
- How the change will be made.
- If the change will result in any additional security issues or increase the risk to the system.
- Back-out procedures in case the change is not successful.
- What additional training and documentation will be necessary for both support staff and end users.

Test the Change:

- If a test environment is available, the change should be tested.
- Detailed discussions and tabletop testing should supplement testing in a test environment. They may also be used as an alternative if test equipment is not available.
- Look for unintended consequences that might result in stability or security issues.
- Communicate the results of the tests to supervisory staff so that final approval can be given.

Obtain Approval to Move Forward with the Change:

- The change request and the results of testing should be presented to supervisory staff.
- Supervisory staff should be advised on the risks and benefits of making the change as well as the risks and benefits of not making the change.
- Supervisory staff may alter the plan or send it back for revision, if it determines that certain aspects of the change proposal are unacceptable or need more work.

Execute the Change:

- If at all possible, enact the change for a small group of users in the live environment prior to enacting the change for all users. This will help minimize any problems that were unforeseen in the testing phase.
- Make sure that support staff is available and prepared to assist in the change process.
- If system availability will be affected while the change is being made, notify affected individuals letting them know what to expect and when to expect it. They should also know whom to contact in case they experience difficulty as a result of the change.
- Verify that the change was successful and that the system is stable.
- Notify affected individuals that changes are complete.
- Provide documentation and instruction to users that will be affected by the change.
- Record that the change took place in network/IT documentation

Strategic Planning Technology Recommendations

In 2010, NJP formed a Technology Workgroup to identify the “gaps” in NJP technology as part of a Mission Implementation/Strategic Planning process. The group’s recommendation for the development of an internal information management system is set forth below.

Our goal: Increase our ability to carry out our mission by ensuring we are using technology efficiently. To this end we:

- Identified strengths and weaknesses in our existing technology.
- Identified training that needed to be offered.
- Identified technologies that might be beneficial to our work now or in the future.

Our process: We divided our analysis and group into three main categories based on how NJP uses technology:

- Client/Party Communication
- Generating/Creating
- Collaborating

Ideas and gaps were identified in each area by the assigned groups. At the same time, a “Gaps in Technology” Survey was sent to all staff. A list of issues identified by the groups along with the survey results was presented to the large group for their consideration. Some issues had immediate solutions and assignments were made for prompt rectification. The restructuring of the new NJP Intranet was very timely and the “Technology” area has been improved immensely.

The recommendation: Information management was the recurring theme. Staff want to organize NJP’s vast information in an effective way, allowing us to serve our clients more efficiently. A new system is envisioned which will allow fast access to questions and advice on substantive topics as well as provide an easily maintainable, searchable, and accessible NJP brief, pleadings, and forms bank. To proceed in a cost effective (free) way, NJP received help from the UW Information School through a Capstone project with the graduate program (The “I” school combines library science and technology). Our proposal was accepted and a team of three highly qualified graduate students worked with the technology work group as well as other staff during the winter and spring semesters (Jan – June 2011.)

A final information management system recommendation was presented by the students to the committee in June 2011. In anticipation of continuing the students’ work, NJP applied for and was awarded a 2012 TIG grant to develop the system in SharePoint as well as integrate it with Legal Server. NJP has entered into partnerships with the University of Washington iSchool and Microsoft to accomplish this task. IKE launched in September of 2012.

Other suggestions that have been successfully accomplished as part of the strategic planning exercise included:

- Creation of an NJP Forms Bank: There are now 150+ sample legal forms posted on IKE.
- A new online NJP Technology Manual has been developed.
- NJP Office brochures, posters and PSA's have been collected from around the state and posted.
- Tables of Authority training has been presented, recorded, and posted.
- Family Soft trainings (2) were presented, recorded and posted.
- A list of all Washington Courts and Clerks offices has been posted on the intranet.
- The NJP Staff Directory is now posted with photos and searchable by office, areas of expertise, etc.

Technology Projects/Achievements 2008-2012

- Evaluated, selected, procured, configured, and implemented the Legal Server case management system (CMS) for Washington programs and successfully migrated all case histories, time records and data to this robust web based case management system June, 6, 2008.
- Successfully trained all NJP staff on the features, functionality, and use of the Legal Server CMS system.
- After NJP migration, worked with other Alliance members on their adoption of Legal Server.
- HotDocs pilot project: Completed May 2010. Interviews for a simple divorce, answer to divorce, letter for return of damage deposit, and protection order posted on www.washingtonlawhelp.org
- Improved service to clients through CLEAR's efficient use of Legal Server electronic referrals both to NJP's field offices and to our Alliance partners. Because all partners are now using the same CMS, we can send referrals electronically rather than by fax. This significantly reduces time spent on referral data entry.
- Completed installation of Cisco ASA devices in all NJP offices which create permanent site-to-site VPN tunnels between all branch offices and the Seattle office for secure data transfer and remote access.
- Completed installation of new servers in all Branch Offices which enabled all offices to be a part of the same Domain. This has significantly improved the security of and the IT staff's ability to administer branch office networks.

- Installed and migrated the Seattle office's Internet connection to a T-1 cluster necessary to host the videoconference bridge.
- Successfully converted the original DSL in the Seattle office to be used as an instant backup to the Internet in case of a T-1 outage.
- Implemented NJP statewide videoconferencing system. Purchased and installed a video bridge to facilitate statewide videoconferences between NJP offices and other Alliance partners per the State Plan.
- Improved network and data security through contracting with Postini (now Google) for spam filtering.
- Replaced Qwest copper lines in the Seattle office with a T-1 for local dial tone. This enables the large Seattle staff to have more back lines in an effort to relieve some of the heavy phone traffic coming through reception as well as save NJP a substantial amount of money monthly.
- Upgraded BCMS phone monitoring software.
- Conducted regularly scheduled and on-going technology skills trainings on basic computer applications/software through monthly Wednesday Wisdom trainings.
- Maintained NJP's overall technology systems at a high level of reliability and with sufficient capacity to support our service delivery.
- Continued systematic replacement of older desktops, when needed.
- Outsourced the shredding and recycling of confidential material for added security.
- Instituted program wide automatic email deletion schedule for Deleted and Sent emails.
- Maintained and improved technology system/network documentation and disaster preparedness.
- Continued "green practices" such as: setting all of the copiers to default to 2 sided copying; installation of two-sided printing cards on all HP printers; implementing a policy to forward emails and documents to the case management system instead of printing; recycle toner cartridges for all equipment, etc.
- Redesigned and updated the NJP program website and intranet site which has been in existence since 1997 at www.nwjustice.org . This website has been re-developed using Drupal, an open source content management system which will be easier to manage, has better search capability, includes wiki and blog functionality, and is database driven. NJP employees rely on the present intranet site for advocacy policies and procedures, personnel and benefit information, tech tips, program passwords such as MIE and

Clearinghouse, updated NJP Personnel and Administrative Manuals, CSR Handbook and Q &A, LSC regulations, and all client and accounting forms.

- Changed most branch offices from copper lines and DSL to cable Internet and phone, thus upgrading service and lowering cost.
- A new Ticketing system has been implemented by the NJP tech team using the open source software, Spiceworks.
- Adobe Professional installed in all offices.
- Built two new physical servers to act as hosts to a number of virtual servers. Initially, this will be using local storage.
- Launched CLEAR*Online: Online intake system targeted at high priority legal issues and allows for information to be electronically transferred directly into Legal Server.
- Upgraded to Office 2010 on all desktops.
- Provided mandatory training on Office 2010 to all NJP staff.
- Upgraded to Exchange Server 2007.
- Raised the functional level of our Windows Domain from Windows 2000 to Windows 2003/2007 mixed in preparation for Exchange 2007.
- Completed the SAN implementation and migrated virtual server storage from local shared storage to highly available SAN storage.
- Launched SharePoint 2010 program wide.
- Upgraded all branch office servers to new Windows 2012 servers (2012-13).
- Offered IKE training.
- Switched online backups from Connected.com to Mozy for all branch offices to work with the new Windows 2012 servers.

Goals, Objectives and Achievements for 2012-2013

- Task to be accomplished by end of 2013:
 - Enhance the case management system as needed.
 - Upgrade to Exchange Server 2013.

- Convert eight TI's to Ethernet over copper in the Seattle office for data and local dial tone.
 - Complete installation of DR system using AppAssure backup software.
 - Offer advanced SharePoint training to staff.
 - Evaluate the phone and data delivery platforms statewide and implement a Unified Communications system (2014 TIG proposal).
 - Continue to develop an electronic document and data retention and destruction policy for both Word/Excel docs as well as the email inbox as suggested in the LSC document, Technologies That Should Be in Place in a Legal Aid Office Today.
 - Work with PSTI – the CMS provider - to generate GIS mapping and trending profiles for use in advocacy and planning to analyze where and to whom NJP's services are currently directed and provide valuable data that will help identify gaps in service and suggested improvements. (2013 TIG proposal)
- **Projects Under Consideration or Subject to Financing**
 - Investigate implementation of email to fax and fax to email functionality in all NJP offices. (This will be included in the unified communications system).
 - Purchase/build an Update Server to better manage all Windows and other updates rather than rely on the automatic update function presently configured on all desktops.
 - Continue converting physical servers to virtual servers.
 - Upgrade Seattle's print server to Windows Server 2012 to better accommodate Windows 7 functionality.
 - Continue to systematically upgrade to newer desktops with Windows 7 as needed.
 - Install secure wireless accessibility in all NJP offices.