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

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1. **Project Goals & Objectives. Identify the goals and objectives set forth in the LSC-approved evaluation plan for the project. Describe any significant changes in the goals that were made during the course of the project.**

Utah Legal Services created a wiki to host our Domestic Relations Manual. A wiki is an interactive web page that allows access to only a specific group of users to view, edit and/or update.

The 1600 page Manual was transferred on to a wiki to ease access of use and allow a large number of people and offices to update the document, resulting in a more quality product. We hope more people will use the Manual and rely upon the information provided. This will improve the quality of assistance provided by both staff and volunteers to our clients.

The wiki also allows us to post training videos and improve our ability to train and recruit volunteer attorneys. We plan to use the Manual as a recruitment tool to encourage more volunteer attorneys to take pro bono domestic cases.

The goals and objectives identified in our approved evaluation plan were the following:

1. Enhance the quality of staff and pro bono representation in family law matters by providing ready access to the domestic manual and video training
2. Improve staff and volunteer access to the manual by transferring document on to a wiki
3. Use the wiki to enable staff to update the manual more easily and more efficiently
4. Improve the quality of the manual so information provided is current and easy to locate
5. Increase recruitment of volunteer attorneys and placement of pro bono family law cases
6. Create and embed in the wiki videos that will improve the quantity and quality of family law training and support available to pro bono attorneys

In reviewing these goals and objectives, I do not see any significant changes that we made during the course of the project.

2. Evaluation Data and Methodologies:

Through in depth interviews and informal surveys, we assessed the success and failures of the project. On going assessment of the project will be accomplished using data obtained through Google Analytics.

We initially surveyed 20 staff members and 10 volunteer attorneys. The surveys included the following ten questions with four answer options: "yes; no; no difference; or have not used the wiki in this way". Each survey also asked for general thoughts and opinions.

The interviews were conducted over the phone or in person and varied in duration from ten to twenty-five minutes. In the interviews, we asked for a general description of use, confirmed they were able to log on easily, discussed what chapters were changed or edited, as well as, the use of footnotes and links. We then asked for comments about each of these areas and comparisons between the wiki and using the Manual in its former version.

More than 70% of our family law practioners in-house were surveyed. Nine of these people were interviewed. We also interviewed 7 of the 10 volunteer attorneys who were surveyed. 5 staff members who were not surveyed were interviewed and 5 volunteer attorneys were asked to complete a survey before their interviews. We surveyed five of our stakeholders and six volunteer attorneys at a clinic. Our experts, who will supervise the wiki and keep it updated, were surveyed. Four of these eight experts were also interviewed. These four included three staff members mentioned above and one member of our stakeholders group. In addition, we interviewed five volunteer law students at clinic and one secretary of a pro bono attorney.

Those who were surveyed were given the choice to complete the survey with or without including their name. From the survey results, we learned that several members of our staff had not been able to access the wiki or were having problems making changes or understanding how to navigate through the document. This was not learned through our interviews. The anonymous survey results allowed participants to be more honest, we therefore learned more about problems or issues than we did through the interviews. The interviews gave us more detailed information about how people were using the wiki and encouraged people to play around on the wiki before the interview was scheduled.

We offered two trainings during the three month test period and then a third training after the test period. There were six individual sessions with staff members who were unable to use the wiki even after attending the training or who were unable to attend the training due to scheduling conflicts. The trainings were all held remotely so participants could attend from wherever they were located. Anyone who participated

in training was given a user name and password. Follow up was conducted to determine whether the training was useful and if he/she was able to access the wiki and either view the document and/or edit it. For 90% of the people, the one training session was all they needed to begin accessing the wiki.

3. **Summary of Major Accomplishments, Recommendations and Future Steps:**

The transfer of any large manual or document to a wiki can and should be done! We found that there is very little downside to transferring a document onto a wiki. The time it takes to accomplish this task is minimal compared to the advantages it offers:

- The Manual is easier to access on the wiki and allows us to embed links to forms and other web resources within the Manual.

- The wiki enables users, regardless of location, to access the Manual at any time. In fact, users can access and edit the Manual at the same time.

- The wiki makes the process of updating the Manual easier and more efficient. The wiki allows edits to be made quickly and supervisors are notified of changes which can be accepted or rejected with one easy click.

- The quality of the Manual has improved significantly. It is now more accurate and reliable because there is only one version and can be edited quickly.

- More people are using the Manual because it is easy to access and users have more faith that the information provided is correct.

- The Manual is a recruitment tool for volunteer attorneys who want access to the information in the Manual and for those individuals who need the training and support.

- The Manual allows us to post training videos for volunteer attorneys who are not otherwise able to attend trainings or free CLE events. This helps with recruitment of volunteer attorneys, especially in rural areas.

- We will continue to add training videos to our library and hopefully fill the Manual with videos to supplement each subject matter.

This project can and should be replicated by any legal service program that owns a manual or large document that is accessed by several users and editors. We plan to replicate this project at Utah Legal Services so that our Housing Manual, Bankruptcy Manual, Employee Manual, etc. can all be posted online and easily updated.

4. In depth analysis of accomplishments:

The most significant accomplishment is that we were able to complete the project. As we have already mentioned several times, this Manual was "the monkey on our back". For years we struggled to keep the Manual accurate and up to date. Although it took a considerable amount of staff time to apply for this Grant and complete the project, we were able to meet our goals and now have a Manual that we are very proud of and will add value to our services.

It is a significant accomplishment that we were able and willing to try this new technology. When we first started this project, our understanding of a wiki was very limited. A few of us had heard of a "wiki" but had scarcely used one before. No one really knew what a wiki was other than a new tool used by a few other legal services programs around the country. With the help of the TIG conference, we were able to educate ourselves about this new form of technology. Because of this project, we are now in a position to teach others about the benefits of wikis. This improves our image both with donors and volunteers, as well as, improves our worth among staff.

One major benefit to the Manual has always been its supplemental forms. This project forced us to review and update the forms. Most chapters included sample forms to accomplish what is required by the statues. These forms were difficult to use as they were simply pieces of paper added to the end of each chapter. During this project we were able to include links to forms instead of just copies of sample forms. We determined which forms are available on our court's website and provided links to the court approved forms. Over the next several years, the courts' websites will eventually include all forms necessary to proceed in a domestic matter. But for now, any form that has not yet been approved and posted on the court's website will be available through our wiki. These forms are an invaluable resource to domestic practioners throughout the state. The wiki allows us to better share these forms with our staff and volunteer attorneys.

As we discussed in our grant proposal, there were several different versions of the Domestic Manual floating around our offices. Some of the versions were saved as Word documents, while others as Word Perfect or PDF files. Each year when our staff would attempt to update the manual, it was a struggle to find the correct version to review. Attorneys were then reluctant to work on the Manual for fear they were not using the most up to date version. Staff was also hesitant to share the Manual with private attorneys for the same reason. Now that the Manual is located in one place, it is easy to determine who has made revisions and when. The Manual is now a reliable, trusted document. Usage has already increased dramatically among both staff and volunteers.

Staff analysis of the project has been almost 100% positive. Staff clearly stated in follow up interviews and surveys that the process of updating the Manual was now easier and more efficient. As mentioned, some of our staff previously updated the Manual by making hand written changes and then asking support staff to edit. This

meant two people were required to make any change. Also, since our four offices often had various versions of the manual, changes were made depending on where the staff attorney's office was located. Now that only one version of the Manual exists and it is easy for all the staff to access, changes only need to be made once and by one person. This has made the process much more efficient. One staff survey stated that updating the Manual is no longer a dreaded task and instead she has found herself voluntarily making changes to the Manual without being asked by a supervisor.

Data from the surveys and interviews determined the extent to which the wiki enabled attorneys to represent the clients more efficiently and effectively. Both volunteer attorneys and staff who handled domestic cases clearly documented that access to the Manual is "vastly easier" and usage has increased significantly. One staff member indicated in a survey that now "We can access the Domestic Relations Manual from computers at clinics". This is important because several of our staff and volunteer attorneys attend clinics in rural counties and do not have access to books or are not able to travel with large manuals. The wiki enables them to access the Manual from any location.

Both staff and volunteer attorneys clearly stated that the process of updating the Manual was easier and more efficient. One staff attorney stated in her interview that it took her less time to update her assigned chapters than it use to take her to locate a copy of the Manual. Similarly, a volunteer attorney stated that she was able to review and update one chapter in less than 30 minutes, a task that use to take her two hours or more. Because our staff attorneys were given the surveys during a domestic task force meeting, the surveys were completed and returned quickly. It was difficult to convince volunteer attorneys to complete and return the surveys. We therefore had less survey data from volunteers than staff.

However, volunteer attorneys did take time to be interviewed by our Pro Bono Director. They expressed strong appreciation for our work on this project and indicated that they were more likely to take a case because they had access to the Manual on the wiki. Volunteer attorneys also stated that the Manual was easier to search than the old version. They indicated that they were more willing to use the information obtained from the Manuals as they had "greater faith in the accuracy of the information". This is because the wiki allows them to see when the information was updated and by who. Attorneys, who accepted domestic cases in the last six weeks of our test period, stated they took a case only because they had access to the Manual.

That being said, we did have one volunteer attorney who refused to access the Manual on the wiki and even asked that we fax him certain pages from the wiki. This person, however, also does not have an email account and is uncomfortable using the internet. Another volunteer attorney, who often updates our Tax Chapter in the Manual, indicated that his secretary would be accessing the wiki, not him. We then followed up with his secretary, who had already made changes to the wiki and was

very pleased with the project. She stated in her interview, "it took her 1/10 the amount of time to update than it use to take."

Our Domestic Task Force Chair, Patricia Abbott, has found the wiki improves the quality and quality control of the Manual. She stated in her survey that the Manual is now more up to date and allows her to review changes and make comments quickly. She stated in a follow up interview that the time allotted for updating has been cut in two. She has also been able to assign chapters easily and then determine quickly whether the assigned chapter was updated, when it was updated, by who, and what they did. Our former chair, Mr. Steve Julien, has recently retired and although he is generally not comfortable with technology, he has been able to access the wiki and make suggestions for changes to Ms. Abbott.

The Family Law Clinic, held twice a month in Salt Lake City, has been accessing the Manual during the Clinic to answer questions and provide a brief introduction. Volunteer attorneys and law students interviewed at the Clinic stated that they were using the Manual to refer individuals to the correct forms. One student stated in an interview, he felt accessing the Manual at the clinic provides him with the confidence to help attendees because he can easily verify the information or advice being given.

It is difficult to determine how many people used the Manual in 2007 compared to how many used it in 2008 or now that it is posted on the wiki. We discouraged volunteer attorneys from accessing the Manual in its former version because we could not ensure that it was accurate and up to date. It is therefore safe to conclude that the Manual is now being used much more frequently than it was in 2007 or prior.

Volunteer attorneys who accessed the training videos were interviewed to determine whether they thought the videos were helpful. The volunteers indicated in follow up interviews that the videos were "informative and convenient". In particular, it allowed them to receive the training they needed without having to leave their office. The videos gave them the confidence to take a pro bono case and proceed with a hearing.

We have not yet determined whether our staff has found that the videos improved the quality of representation by volunteers. Over the course of the next year, as more attorneys access the videos and represent clients at hearings, we will be able to gauge whether these videos are helpful. Specifically, whether volunteers are more sensitive to victims of domestic violence and the barriers they face.

We also set up an account with Google analytics which tracks a variety of information including number of visits to the wiki, where a user is located, how they got to the wiki, whether they are a new or returning visitors, etc. We decided to use this service because it is free and gives us the amount of information we need or can digest in a useful way. Over the course of time, this information will show us important patterns such as whether people are getting to the wiki through our website or through other links, whether users are just viewing the main page or if they are

actually viewing the wiki for long periods of times, and which chapters they are accessing. The data can also be set up to let us know whether the videos are being downloaded and if the users are first time or returning users. This will help us tremendously in assessing how to make the wiki easier for people to find and why they are viewing the Manual. It will also help us track usage among volunteer attorneys and determine whether this project was successful in meeting its goals.

Our staff experts will continue to monitor the wiki and make ongoing assessments of the Manual and the accompanying videos. Supervising attorneys can review changes easily through email notifications and either accept or decline any change posted on the wiki. The editing function of our wiki is as easy as editing a Word document. This means that users do not need to learn a new set of skills. Members of our editing group are located throughout the state in different offices. Any time a revision is made, this group receives an email and can them review and accept the change. This is a much more efficient method of review as a change needs only be reviewed once, by one individual. This also limits the time that our Domestic Task Force spends trying to review changes and make sure certain sections are updated. Our task force chair explained in her interview, "This new technology allows me to spend more time on case review and less time trying to manage updates to the Manual.

The wiki allows different people to update the Manual at the same time. We do not need to worry about whether someone else is in the document first. Edits can be made by several different people at the same time. The wiki can be accessed on any computer so editors can work on the project either at home or in the office. Several employees indicated in their surveys that they were accessing the wiki during intake hours, while on hold, or while waiting for clients at clinics. Using this down time to accomplish editing tasks also makes the process more efficient. Removing these editing obstacles, results in a better long term product.

One major obstacle to updating the prior Manual was finding where within the document changes were needed. The wiki solves this problem because of the search function. For example, if a portion of our custody statute is altered during a legislative session, our editors can search for key words and make sure the statute is updated wherever it is referred to within the Manual, not just in the custody chapter. Supervising editors can then review changes and make sure they are accurate.

The ability to search the Manual by linking to chapters from the Main Page and to footnotes within each chapter also improves the document. Because of the links, users can go directly to the chapter they are looking for without having to thumb through a large paper notebook. While reading a section of the Manual, a user is also able to quickly refer to the legal authority. We initially planned to link directly to the statute or case law but determined that keeping these links active would take too much maintenance. Instead we plan to include a reference or resource page that then links to outside authorities. Unfortunately, this has not yet been established but will be completed within the next several months. The current ability to link to the footnotes is already a significant improvement.

The videos are an important asset to the Manual and to our program both for staff and pro bono attorneys. The idea of using videos as training tools had been kicked around for years. A major obstacle of our program is our ability to serve clients in rural areas. Utah, like other states in the West, has a large portion of its population scattered around the state in rural communities. We frequently have problems finding volunteer attorneys in rural counties to represent our clients. These videos will provide an invaluable resource and provide support to these volunteers.

Our staff attorneys, some of them very experienced, have recently taken on domestic cases for the first time to help with staff shortages and an increase in demand. These attorneys also agreed that the wiki and videos were invaluable in helping them get up to speed and feel more competent in proceeding with matters beyond their expertise.

The wiki has already improved our pro bono program by offering another incentive to attorneys to volunteer. Volunteers are given a link to the wiki each time they accept a case and are being referred back to the wiki and videos with follow up questions. This helps with both recruitment and retention of volunteer attorneys who would like to do more pro bono work but need the additional support that our staff is often too busy to provide directly.

We have had more attorneys volunteering because we have been recruiting more frequently. As we are anxious to show off our new project to outside attorneys, we have frequently included the wiki in various presentations and CLEs this past year. This project gives us something new to discuss and draws attention to our organization. The wiki shows volunteers that our program is innovative and technologically advanced. Increase in usage will continue over the next year as we slowly integrate the wiki into our various levels of service throughout the state.

In our follow up interviews, attorneys indicated that the wiki and supplemental training videos gave them the confidence to take a pro bono case. Without easy access to the manual and the training videos, they would not have otherwise agreed to take the case or instead waited until a CLE was available. We have learned that when a volunteer indicates an interest in taking a pro bono case, it is very important to strike "while the iron is hot". If the attorney is forced to wait weeks or months for a training session, they often lose interest and are unwilling later to accept a pro bono client. The manual and videos allows us to respond quickly and hopefully involve the attorney when he or she is available and open to the experience.

Our pro bono department also heard positive feedback from volunteer attorneys who took cases that later required research. These attorneys and their staff were referred to sections of the Manual to answer questions regarding background checks in adoption cases and paternity issues where the biological father was deceased. The volunteers saved invaluable time because they were able to access the Manual and answer their questions quickly. The clients were also better served because their

cases were completed in a timely manner. A positive experience with a pro bono case improves the likelihood that an attorney will be open to helping another client.

The wiki will continue to evolve and improve over the next several months. As we become more comfortable with the functions, we will rename links available on the side bar that are currently unused. For example, we plan to have a practice points section where some of our experts can add detail regarding how to proceed or strategies that have worked in the past. There is also a discussion tab where editors can engage in conversations about changes and discuss pending cases. These practice points and discussions by our group of editors and experts will be available to anyone with an account and will improve the document.

The wiki will also be a valuable asset to our new statewide website. Both staff and volunteers who access our website will be able to use the wiki and access the Manual. This will increase the number of website users and improve the overall image of our Program.

5. **Factors affecting project accomplishments – Significant challenges the project confronted. Describe any factors that significantly enhanced or limited the project's accomplishments.**

Our first significant challenge was finding a programmer to hire. Our first programmer spent a considerable amount of time researching the types of wikis and comparing and contrasting the pros and cons. I think most professionals who work in the private sector would appreciate such in depth research. However, we soon learned, our needs were very simple and so the wiki needed only to function at the most basic level. We were fortunate to find another programmer through our contact at the State Bar, who was able to jump on the project and provide us with the skills and work we needed.

Otherwise, the project proceeded smoothly. We had a strong network of both staff and volunteer attorneys willing to provide expertise and skill as needed. It took us less time to transfer the document on to the wiki than we expected. The editing tasks will continue even during the next several months as we update the manual and make sure the forms are correct, and the footnotes are accurate. Since we had several different versions of the Manual, we may have lost some of the updates. This will be rectified shortly as each domestic task member has been asked to again proof read and update their assigned chapters.

The taping and posting of the videos also took less time than expected which was due in part to finding a good cinematographer. We were lucky to be able to work with Mr. Stewart who is also employed as the Digital Media Specialist at the University of Utah's Law School. I believe without his skills and equipment, the videos could have been much more difficult and expensive task.

6. **Strategies to address major challenges – identify and discuss the effectiveness of strategies used to overcome important challenges.**

As our only real obstacle came initially in hiring a programmer, we were able to overcome this challenge by agreeing as a group to cut our losses and hire a second programmer. Our group of three included Brenda Teig, Director of Pro Bono, Craige Harrison, Managing Intake Attorney, and Eric Mittelstadt, Director of Advocacy & Personnel. We met often and worked together to communicate tasks accomplished and set up goals with specific deadlines. This helped keep us on track and forced us to keep the project moving forward.

7. **Major lessons and recommendations**
   a. **Important lessons you learned from this project**:

We learned that hiring competent experts is often more cost effective than trying to learn a new skill and do a project on our own. Our first obstacle we encountered was trying to use a wiki software program that was unnecessarily complex. After attended the TIG conference, we learned enough about the different software choices to make a good decision about the type of wiki we needed. However, we did not trust ourselves and thought we needed more information about the various wikis that exist. As is often the case with technology, most of us do not need all the bells and whistles. We finally determined with the help of our second programmer, that the Mediawiki was sufficient for our needs.

We also decided that hiring a camera person to tape the videos was well worth the extra money. This professional was able to advise the actors in how to present the materials, edit out unnecessary sections, and set up the room for taping with proper lighting and limited noise. He also suggested adding text to each video to emphasize key points. We initially thought 10 minutes was sufficient, but quickly discovered that this was too long. Mr. Stewart taught us that most videos on the web are only two to three minutes long. The extra funds we spent hiring this person and his equipment resulted in a finished quality product that is worth much more than the money we paid him.

   b. **Recommendations you have for other legal services programs that might implement a system or strategy of this type**

I would highly recommend other programs that decide to do a similar project not hesitate to hire outside experts. In particular, a programmer to set up the wiki and a media specialist to tape and create the videos. It does not take much time for these experts to do the tasks required and is well worth the money.

I would also suggest that other legal services program take the time to research different wikis that are available. It is possible that the Mediawiki is not the best option. As we become more familiar with our current wiki, and learn more about the limitations of the program we choose, we may learn other wikis are in fact better suited to these types of projects.

c. Recommendations for further development of the technology or initiatives developed through the project and for how they can be best adapted and used by other LSC grantees

I strongly encourage other programs look into using a wiki. The amount of time to set up and create the wiki is small compared to the benefit that we will derive from years of using the document now that it is easily accessible. I also think the training videos will serve as an invaluable recruitment tool for volunteer attorneys as we develop our pro bono program and hopefully place more domestic cases.

I believe a wiki could also be useful for other projects including drafting large trial briefs, organizing events, etc. It has been suggested that we experiment with using a wiki to organize our next pro bono recognition event which will include input from several different organizations and firms.