

**MICHIGAN TECHNOLOGY PLAN 2003**  
Revised by the Legal Services Computer Committee  
June, 2003

**Background**

In 1995, the Statewide planning for legal services was conducted by the Legal Services Association of Michigan (LSAM), the Michigan State Bar Foundation (MSBF), and the State Bar of Michigan (SBM). This planning process resulted in The Michigan Plan containing 57 recommendations, including eleven technology recommendations. Those technology recommendations have been substantially implemented. However, new technologies are evolving rapidly making it important to continue a dynamic, on-going process—continuously updating the statewide Technology Plan—rather than viewing the Plan as a static, one-time event.

This process of continuing review, evaluation and implementation and the resulting document is called the *Michigan Technology Plan (MTP)*. It guides implementation of technology in legal services in Michigan at the statewide level. This Plan is revised by the Legal Services Computer Committee annually to reflect the status of technology projects as well as to incorporate new technology developments.

**I. Goals and Strategies of the Michigan Technology Plan**

The MTP flows from the 1995 Michigan Plan technology recommendations and subsequent needs identified. These revised goals and strategies of the Legal Services Computer Committee were adopted on June 11, 2003.

**MICHIGAN TECHNOLOGY GOALS**

- Improve client/community access to justice and extend the reach of advocates through effective use of technology.
- Promote collaboration and improve service by intra and inter program communication and resource sharing among legal services programs and other constituents.
- Assist legal services staff and pro bono attorneys in collecting, managing, utilizing and reporting on client and case information by implementing compatible case management system(s).

There are three main strategies to achieve these goals:

- Develop a technology and communications infrastructure to support these goals.
- Encourage collaborations among legal services providers and others in the justice community to assure that new technology initiatives support goals of integration of service delivery and compatibility of program systems.
- Articulate standards to guide Legal Services programs in their own technology planning so that all providers are able to fully participate in statewide planning and support for projects in the Plan.

The Plan sets forth standards and steps for implementation of these strategies in the description of the Plan that follows:

## **II. Description of the Michigan Technology Plan**

The MTP incorporates technology developments in each of the three goal areas noted above, as follows (references are to the Technology Recommendations of the Michigan Plan for Legal Services, 1995):

### **A. *Infrastructure--Providers should acquire the following in order to have a minimum infrastructure for participation in the initiatives in this Plan.***

1. PC on every desktop of fulltime Advocates and Support Staff with sufficient speed, memory and storage capacity to run current software applications;
2. Local Area Network in every office of 3 or more;
3. Broadband Internet Access (where available) at the Desktop for all Advocates and Support Staff;
4. Automated Phone and Voice Mail Messaging System;
5. Internet based legal research capacity;
6. Backup systems and system redundancy;
7. Either in-house support or external maintenance/technical support arrangements for hardware and phone systems.

### **B. *Integrated Case Management System***

1. Compatible Case Management System(s): Legal Services programs should have an integrated system, accessible to all staff, and capable of providing the following:
  - a. Integrated case tracking and time-keeping/calendar functions;
  - b. Standard Reports consistent with Statewide protocols for naming, fields and menus.
  - c. Contributing to and using Standard Intake Questions and Advice as developed;
  - d. Internet-based Accessibility;

*In 2002-2003, the PIKA Case Management System was piloted by four programs and found to meet or exceed the minimum standards above. As a result the PIKA case management system is the recommended system and is supported by statewide technology staff. Any other case management system should meet the additional criteria of having the capacity to exchange critical information with the recommended system. The Legal Services Computer Committee will assist in identifying possible "bridges" between this software and other case management systems to assist with compatibility for the purpose of exchanging data (e.g., for case referrals and reporting).*

2. Future planning for integration with case management systems:
  - a. Automated Document Assembly System - HotDocs or Acrobat PDF integration – to assist in generating court forms and other documents;
  - b. Document Management, including email attachments;

### **C. *Collaboration and Substantive Support***

1. Statewide Website (mplp.org)
2. Web-based Brief Bank
3. Discussion Webs
4. Web-based PAI Support and Outreach
5. Internet Based Email Account for all Advocates and Support Staff
6. Statewide Email Address Book
7. Statewide Email Lists
8. On-line Legal Research Capability at no cost or favorable pricing
9. Accounting Software Recommendation

**D. *Community Outreach and Client Access***

1. Community Oriented Website (MI LawHelp.org)
  - a. Web presence for every program
  - b. Legal Aid Locator
  - c. CLE and Pro Se Materials On-line
  - d. ADA Compliance
2. Digital Divide Working Group
3. Community Access Outreach Pilots
4. Electronic Filing

**III. *Implementation and Support***

In addition to identifying projects consistent with the statewide technology goals and strategies, planning includes evaluating new technologies through pilot projects, reporting on results with recommendations for implementation, support in the program implementation of selected systems, and ongoing technical support for those systems. This implementation and support phase of the Plan is accomplished through the cooperation and support of all organizations involved. These entities include the following:

**A. *Committee Structure***

1. Legal Services Computer Committee ([LSCC]; members include representatives from Legal Services Association of Michigan [LSAM] and other providers, State Bar of Michigan Access to Justice Department [SBM-ATJ], and Michigan State Bar Foundation [MSBF])
2. CRP Task Force (Legal Services Program Computer Responsible Persons)
3. State Bar Access to Justice Task Force Technology Subcommittee

**B. *Organization Functions***

1. Michigan Poverty Law Program (MPLP) -Technology implementation and support and state support integration.
2. Michigan State Bar Foundation (MSBF) - Funding and technology support.
3. MSBF Funded Programs/Other Legal Services providers - Technology implementation - designated Computer Responsible Person (CRP) for program and every office.

4. State Bar of Michigan (Access to Justice Technology Position)—Technology implementation and support.

**C. Staffing of Statewide Technology Initiatives**

1. MSBF funded Programs (.2 FTE) - CRP in every office
2. MPLP (1.5 FTE) - Technology development, coordination, and support
3. SBM (0.5 FTE) - Technology development, coordination, and support
4. MSBF (0.5 FTE [up to 0.4 from Student Intern]) - Project financial management and support

**D. Training**

1. Mini-seminars and taskforces (CRPs)
2. Annual Tech. Training - "Roadshow" (CRPs/Users)
3. Web-based Training Pilot (CRPs/Users)
  - a. Partner w/CORT for On-line Case Management and other Technology Training
  - b. Server at MPLP
  - c. On-line video training library
  - d. Live web casts

**IV. Evaluation and Accountability**

**A. As part of the on-going process of setting goals, developing strategies and implementing projects, the Legal Services Computer Committee is accountable to the state justice community:**

1. The Legal Services Computer Committee evaluates technologies that have been implemented and reports to LSAM and other interested providers (who are among those who implement the projects), the Foundation (which funds many of the projects), the State Bar Access to Justice Task Force (which coordinates statewide service delivery issues) and the Michigan State Planning Body.
2. Reports on pilot projects\*: Projects have generally been piloted by a small number of providers and reported on with recommendations as to future action, such as expansion of the email network, exploration of case management systems, etc. These reports have been made publicly available on both the MPLP and MSBF websites.

*\*Members of the Computer Committee are regularly reviewing emerging technologies. As the committee evaluates these technologies and identifies ways in which the technologies can improve service to clients or improve service delivery support systems, it makes modifications to existing systems to incorporate these changes, or it develops pilot projects which are narrow in scope to test the assumptions about the applicability of the new technologies. Final recommendations include background as to decisions so that the context and assumptions upon which the decisions are based is clear.*

**B. Criteria for evaluation:**

- Is the delivery of legal services in Michigan, as a whole, better off through the use of technology which has been implemented?
- Does what has been put into place assist in more efficient and more effective delivery of legal services?
- Has the effect of technology been to make the network of legal services providers a more "seamless web" for clients and worked to reduce barriers and obstacles to collaboration among providers?
- Is the technology cost efficient both in the initial installation and in continuing maintenance?

#### CONCLUSION

The Michigan technology planning process provides an effective framework for incorporating what works into the systems that will take us into the future. It also provides a framework for learning from what does not work as well, so that what eventually emerges as the technology systems in use in legal services will be the most effective in serving clients and in supporting the legal services delivery systems.