



Providing legal services remotely: a guide to available technologies and best practices



New Perimeter
OUR GLOBAL PRO BONO INITIATIVE

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Introduction

Legal Services Providers (LSPs) often face challenges in effectively and efficiently providing legal services to their clients. Even before the COVID-19 pandemic, conditions existed that made providing services remotely a desirable alternative to face-to-face meetings. Work schedules, caregiving responsibilities and barriers to transportation can all make meeting face-to-face difficult or impossible. Sometimes the nature of the meeting simply does not require an in-person encounter.

The COVID-19 pandemic has forced us all to confront the reality that providing legal services remotely is not only necessary to meet the needs of clients, but it is also in the best interest of public health and reducing the risk of infection. Meeting with a client in-person is now often impossible. And even when it is possible – is it wise? In-person meetings might not only threaten the health of the client and legal services staff, but also their families and communities.

The purpose of this guide is to highlight some of the ways to provide legal services remotely. Technology has evolved to allow for remote “meetings.” Videoconferencing – until recently available only to large corporations – is now commonly available to anyone with a computer or mobile phone through Zoom, Microsoft Teams, GoToMeeting and other accessible platforms.

This guide will introduce many of those platforms, as well as good practices for using them. It is meant to serve as a practical resource for LSPs around the world, particularly those operating in rural areas.

Providing legal services remotely presents new challenges. Public Wi-Fi networks raise concerns of confidentiality and privacy, as does the transfer of information over the internet or through instant messaging. It can also be a challenge to obtain signatures on legal documents when client meetings are only conducted remotely. This guide will address those issues, too.

On top of the health issues associated with COVID-19, the pandemic has created an increased need for legal services in areas including domestic violence, housing and evictions, public benefits, and issues related to employment. Now, more than ever, the need for remote legal services is critical.

The pandemic will pass, eventually. However, the challenge of providing effective and efficient legal services is ever present. This guide is intended to assist in navigating the current pandemic and to provide a framework for remote legal services in the future. Finally, this guide does not specifically address issues related to working with clients in custody, and thus is primarily targeted at LSPs working on civil matters.



Technologies available for remote work

Although many organizations and companies are unable to meet face-to-face due to the current COVID-19 pandemic, there are many technologies that can be used to host meetings in a socially distant and yet personal manner. There are also numerous technologies available to communicate with clients. This section is intended to present an overview of some of those technologies, to identify potential challenges associated with those technologies, and to provide examples of good practices.

Disclaimer: *We do not specifically endorse any of the platforms discussed in this guide. We cannot recommend software products or guarantee that any product discussed here is available in any given country or is compliant with the confidentiality laws of that country. Further, the companies discussed are not sponsors of and have not endorsed this guide. The technology discussed in this guide is intended to give a high-level overview. Any organization that intends to use one of the identified technologies will need to do its own research and come to an independent determination that the selected technology meets its needs and security concerns.*

A. Online meetings

Even before the pandemic, online video meetings were becoming more popular as a tool to communicate both internally (within the organization) and with clients (outside the organization). As the pandemic persists and many LSPs continue working from home, video meeting platforms have become critical communication tools. When it is not possible to meet in person, video meetings can help organizations facilitate collaboration and decrease feelings of isolation among clients and staff.

Because video meetings allow participants to see each other, they allow people to connect in ways that telephone conferences and email do not. Online meetings also enable the viewing and sharing of documents through screen sharing and typically include a chat function.

While online meetings and video conferencing platforms have grown more popular and become easier to use in recent years, digital meetings can be challenging or impossible in more remote locations. Because of technology and minimum bandwidth requirements, these platforms may not be available or may not operate reliably in areas with low bandwidth, for people who share an internet connection with too many others, or for people who own lower-cost feature phones rather than smartphones or computers. LSPs should also be aware of and sensitive to the technical capabilities of their clients and partners for using online platforms. It should not be assumed that every participant will be able to use every platform. LSPs will need to constantly reevaluate whether it is feasible for their employees and staff to use online meetings, as well as for their clients.

In this section, we first survey different platforms that can be used for online meetings, including a description of each platform and associated costs. We then summarize best practices for conducting and leading online meetings.

Note: *The costs included in this guide are intended as a point of reference when comparing options. All costs are based on current, public pricing listed at the time of publication in US dollars and are subject to change. In some cases, free or reduced cost options may be available to nonprofits.*

Meeting with a client in-person is now often impossible. And even when it is possible – is it wise? In-person meetings might not only threaten the health of the client and legal services staff, but also their families and communities.

1. PLATFORMS FOR ONLINE MEETINGS

Zoom

(<https://zoom.us/>)

Description

Zoom is a cloud-based platform that provides for video and/or audio conferencing and content sharing. Participants can join conferences through their desktop, mobile device, or by phone. During video conferences, one or more users can share their screens. Participants can also use a chat function during meetings. There are also breakout rooms (available with paid plans) so that a larger meeting can be split into smaller sessions for discussion. Zoom offers accessibility features including customizable font size, closed captioning, keyboard navigation, screen reader support, and the option to spotlight or pin multiple videos. Zoom also provides end-to-end encryption and meeting controls, such as a “waiting room,” so participants are permitted to join only when the organizer accepts them, for added security.

Cost

There are various plans available at different price points. Included here are some of the key differences. The cost applies only to the host.

Basic plan: Zoom offers a free Basic plan. For a one-on-one video conference (such as a meeting between a single lawyer and a single client), there are no time restrictions. A one-on-one meeting could last 15 minutes, one hour, two hours, or longer. So long as it is a one-on-one meeting, it is free.

If additional participants are needed (for example, if a lawyer represents two or more clients in different locations who will be attending the video conference separately), the Basic plan allows for up to 100 participants in a single video conference so long as the meeting is 40 minutes or less. There is no restriction on the number of 40-minute meetings that a host can organize. If a lawyer or legal advocate needs to conduct a meeting with clients in different locations for more than 40 minutes, the lawyer (as host) could set up two 40-minute video conferences. While it may be a slight inconvenience for the participants to break their meeting into two sessions, it is a legitimate way to obtain video conferencing services for free.

Pro plan: Zoom also offers a Pro plan that costs US\$14.99 per month. Under the Pro plan, video conferences can last up to 24 hours.

Rates for more than 90 countries are available at: <https://zoom.us/zoomconference/rates>.

Both the Basic and Pro plans allow for participants to record the video conferences locally to a computer. However, only the Pro plan allows paid subscribers to record video conferences to the Zoom Cloud.

Nonprofit discounts: Zoom offers various discount programs for nonprofit organizations. Information about rates and how to obtain a discount is available through TechSoup: www.techsoup.org/zoom. In the upper left-hand corner of this webpage, you can select the country or jurisdiction in which the organization is based to view all available technology discounts. In addition, you may want to check with your local association of nonprofits for any discount codes. You may also contact Zoom directly at <https://zoom.us/contactsales> to discuss discount codes and nonprofit pricing.

LINE

(<https://line.me/en/>)

Description

LINE is a free messaging application that can be accessed by mobile phone or computer. LINE allows for free voice and video calls (up to 500 participants) as well as text messaging. Meetings can be started either by directly calling a person saved to a contact list or by circulating a link. These features are accessible from both smartphones and computers. LINE does not provide any information regarding accessibility features. LINE features transport-level encryption.

Cost

There is no cost for the above features.



Webex

(<https://www.webex.com/>)

Description

Webex is an online platform that provides for video and/or audio conferencing, webinars and content sharing. During video conferences, one or more users can share their screens. Meetings can also be recorded. Webex offers accessibility features including keyboard navigation, low vision support (such as supporting high contrast schemes or text resizing), and screen reader support. Webex provides end-to-end encryption for users joining online.

Cost

Webex has a free option and paid options. The costs apply only to the host.

Free option: The free option allows for up to 100 participants in a single video conference as long as the meeting is 50 minutes or less. Audio connection is only through computer audio (internet, but not phone dial-in), and meetings can be recorded.

Paid options: Paid options allow for additional participants, provide audio-only access via dial-in, extend the permitted meeting length to 24 hours, include cloud recording storage, and allow for file transfers. The paid options range from US\$13.50 to US\$134.75 per month. Plans and pricing options are available at <https://www.webex.com/pricing/index.html>.

Nonprofit discounts: Webex does not offer nonprofit discounts for its Starter, Plus, or Business plans, but it does offer discounts on its Enterprise Plan. Nonprofits may contact Webex directly at <https://www.webex.com/contact-sales.html> for a customized plan and special pricing.

When it is not possible to meet in person, video meetings can help facilitate collaboration and decrease feelings of isolation among clients and staff.

Microsoft Teams

(<https://www.microsoft.com/en-us/microsoft-365/microsoft-teams>)

Description

Microsoft Teams includes chat and call options. There are customizable “Team” communication pages for text or photo sharing, including the option to share files. There are also “chat” functions to send messages to one or more other Microsoft Teams users at a time. Teams also provides for video conferencing or audio calling. Microsoft Teams offers accessibility features including closed captioning, video pinning, chat functions, the option to blur one’s background, high contrast themes, assistive technology compatibility and keyboard navigation. Microsoft Teams provides end-to-end encryption.

Cost

There are various plans at different price points.

Free option: The free plan allows for audio and video calls, screen sharing, meetings, “Team” communication pages, chats, and file sharing up to 10GB.

Paid options: Paid options range from US\$5 to US\$20 per user per month, with added features such as additional security features, recording functions and administrative options. Country and regional availability for audio conferencing and calling plans is available at <https://docs.microsoft.com/en-us/microsoftteams/country-and-region-availability-for-audio-conferencing-and-calling-plans/country-and-region-availability-for-audio-conferencing-and-calling-plans?toc=/skypeforbusiness/toc.json&bc=/skypeforbusiness/breadcrumb/toc.json#select-your-country-or-region-to-see-whats-available-for-your-organization>.

Nonprofit discounts: Small and mid-sized nonprofits can pay US\$3 per user per month to receive Microsoft Exchange, OneDrive, SharePoint, and Teams. That price also includes use of Microsoft Word, Excel, PowerPoint, Outlook, Publisher, and Access. Plans for larger nonprofits range up to US\$14 per user per month.

More information can be found at <https://www.microsoft.com/en-us/microsoft-365/nonprofit/office-365-nonprofit-plans-and-pricing?activetab=tab:primaryr2>.

GoToMeeting

(<https://www.gotomeeting.com/>)

Description

GoToMeeting is an online platform that provides for video and web conferencing, as well as webinars via computer or mobile devices. There are also screen sharing capabilities from desktop, phone or tablet. GoToMeeting offers accessibility features including a high contrast mode, adjustable font size, tab navigation, and keyboard shortcuts. GoToMeeting provides end-to-end encryption.

Cost

GoToMeeting has a free option and two primary paid options – the Professional plan and the Business plan. For the paid plans, the cost applies only to the host.

Free option: The free option allows for video conferencing for up to three participants so long as the meeting is 40 minutes or less. Screen sharing and free audio calling is also included.

Professional plan/Business plan: The Professional plan costs US\$14 per month and permits meetings of up to 150 participants. The Business plan costs US\$19 per month and permits meetings of up to 250 participants, allows recording of the video conferences to the cloud, and offers additional options such as keyboard and mouse sharing. Both paid plans also allow for integration with other platforms, such as Slack or Microsoft Office 365, and additional tech support. Pricing and plan information is available at <https://www.gotomeeting.com/meeting/pricingb>.

Nonprofit discounts: GoToMeeting does not have a set nonprofit pricing plan in place. It may offer nonprofit pricing on an individual basis, most likely for a 10-percent discount on annual subscriptions. Users can contact Sales at <https://www.gotomeeting.com/contact-sales>.

Google Meet

(<https://meet.google.com/>)

Description

Google Meet, formerly known as Google Hangouts, provides for audio and video meetings. Both audio calls and video conferences are encrypted, and users can access Google Meet through a web browser on any device without added software installations.

In video conferences, screen sharing is available. Users are not required to have an account to participate in the video meetings; however, the meeting organizer must grant meeting access to those without an account. Google Meet offers accessibility features including closed captioning, a built-in screen reader, full-page zoom, and keyboard shortcuts.

Cost

As with other platforms, Google Meet has both free and paid plans.

Free option: The free option allows for free video meetings of up to 100 participants for up to 60 minutes per meeting.

Paid options: Paid plans range from US\$10 to US\$20 per active user per month. Features include meeting lengths of up to 300 hours and up to 150 or 250 participants. Paid plan participants also have audio-only access using US or international dial-in numbers. Pricing and plans are available at https://workspace.google.com/pricing.html?ga_lang=en.

Nonprofit discounts: Through Google for Nonprofits, eligible organizations get access to Google Meet and G Suite for US\$0 to US\$8 per user per month. For more information and to request a Google for Nonprofits account, visit <https://www.google.com/nonprofits/offerings/g-suite/>.

Jitsi

(<https://jitsi.org/>)

Description

Jitsi is an open source-encrypted conferencing platform that can be used as a phone application or through a web browser without an account. It features screen sharing, meeting recording, tile view, and the ability for users to blur their backgrounds. Users can also dial in to conferences for an audio-only option. Jitsi does not provide any information regarding accessibility features.

Cost

There is no cost for Jitsi.

Paid options: Paid options allow for additional participants, provide audio-only access via dial-in, extend the permitted meeting length to 24 hours, include cloud recording storage, and allow for file transfers.

The paid options range from US\$13.50 to US\$134.75 per month. Plans and pricing options are available at <https://www.webex.com/pricing/index.html>.

Slack

(<https://slack.com/>)

Description

Slack is a channel-based messaging platform that organizes conversations by “channels” that can be set as shared or private. While Slack is often used as a place to communicate in writing (eg, text messaging and group chats), Slack also includes audio and video options for up to 15 participants. However, video conferencing on Slack, as well as screen sharing, are only accessible on a computer. Slack offers accessibility features including keyboard shortcuts, screen reader compatibility, and the ability to modify the color theme of the platform. Slack encrypts for all user data “at rest,” which is data stored on a network or drive, and data “in transit,” which means that data is protected while actively moving between locations.

Cost

Slack offers various plans at different price points.

Free option: The Slack free plan allows access to 10,000 of the most recent messages (chats) and integration with other applications such as Google Drive or Microsoft Office 365. The free plan also allows for audio and video calls between individuals. However, the free plan does not allow for audio and video calls among groups.

Paid options: The Slack paid plans range from US\$6.67 to US\$12.50 per month and include added security and group options. Information on pricing is available at <https://slack.com/pricing>.

Nonprofit discounts: Nonprofits may apply for Slack for Nonprofits to receive free upgrades and 85-percent discounts on various plans. For more information, visit <https://slack.com/help/articles/204368833-Apply-for-the-Slack-for-Nonprofits-discount>.

Video meetings allow participants to see each other and allow people to connect in ways that telephone conferences and email do not.

WhatsApp

(<https://www.whatsapp.com/>)

Description

WhatsApp is a mobile phone-based application that allows for text messaging, voice calls and video calls through an internet connection. Up to eight users can be on any given voice or video call, and there is no time limit. Documents and other media can also be shared with individuals or groups on WhatsApp. While there is a desktop function for chat, the voice or video call capabilities are only accessible by mobile phone and would require disclosure of each user’s mobile phone number. WhatsApp offers accessibility features on Android phones that includes a “TalkBack” screen reader, the ability to change the display or font size, BrailleBack availability via Bluetooth, and other options such as live caption or live transcription. WhatsApp features end-to-end encryption.

Cost

There is no cost for WhatsApp. Since the application uses an internet connection or the phone’s data plan (there may be costs for the data use itself), voice and video calls can be made through the application to other users at no cost for both domestic and international calls.



Comparison chart of online meeting platforms														
PLATFORMS	ZOOM		WEBEX		MICROSOFT TEAMS		GOTOMEETING		GOOGLE MEET		SLACK		LINE	WHATSAPP
Features	Free Basic	Paid Pro	Free Basic	Paid Starter	Free	Paid Basic	Free	Paid Pro	Free	Paid Essentials	Free	Paid	Free	Free
Hosts	1	1-9	1	1-9	-	-	-	-	-	-	-	-	-	-
Unlimited meetings	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Participant limit	100	100	100	100	N/A	300	3	150	100	150	2	15	500	8
Meeting time limit	40 min	24 hrs	50 min	24 hrs	N/A	24 hrs	40 min		60 min	300 hrs	-	-	N/A	None
Recording	✓	✓	✓	✓	-	✓	-	-	-	-	-	-	-	-
Telephone dial-in for video meeting	-	Toll-based	-	-	-	-	-	✓	-	US and Intl.	✓	✓	-	-
Screen sharing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	-	✓	✓	-
File sharing	-	-	-	✓	✓	✓	-	-	✓	✓	✓	✓	✓	✓
Chat	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Encryption	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

2. BEST PRACTICES FOR ONLINE MEETINGS

Online meetings can help to create a sense of normalcy in remote work environments and when connecting with a client, but of course there are important differences between in-person meetings and online meetings. Although many of the strategies are the same, additional considerations should be taken into account for online meetings, with alternative approaches for success. This section highlights good practices for hosting a successful online meeting.

Scheduling and advance notice

Clear planning with respect to scheduling, timing, and regularity can help you prepare for successful online meetings.

First and foremost, do not assume that your clients, employees, or partners will be able to use any particular platform. Before proposing a video conference or inviting others to a video conference, understand the requirements of the technology you propose to use (including bandwidth requirements) and your audience's capabilities. In locations with low bandwidth, including remote areas or locations where many people share an internet connection with others, these platforms may not be workable.

In an office environment, scheduling is typically the main concern when proposing an in-person meeting. However, there are other issues to consider when scheduling online meetings with employees or clients. For example:

- People working from home may not have the same dress code standards as an office environment. Advance notice is necessary so that all attendees can dress appropriately and feel comfortable in the online meeting.
- Often, people working from home have family members that require attending to. Providing advance notice allows for a caregiver to make accommodations. Especially during the pandemic, LSPs should be very tolerant of caregivers. For example, if a child enters an online meeting, it is important that the parent be allowed to attend to the child's needs.
- Participants will have differing at-home work environments. Some people have limited space and share the "home office" with others. Advance notice is important so that workers can coordinate use of working space.

- Confirm with the client whether they would like you to stop the conversation if you see someone enter the room on their end in order to ensure that they are fully comfortable. Understanding your client's environment and possible risks, particularly in domestic violence and family matters, is critical and may warrant finding another means of communication.

There may be other issues with the home environment that make online meetings a challenge if people are not given time to prepare. Providing advance notice of an online meeting will ensure participants are prepared and able to focus on the meeting.

Organizers should also keep in mind that there may be time zone differences that must be taken into account. While it is not always possible, try to organize online meetings at a time that works for all participants. Avoid very early morning and late evening online meetings whenever possible. Online tools for planning meetings across time zones are available at <https://www.timeanddate.com/worldclock/meeting.html> and <https://www.worldtimebuddy.com/>. Products such as <https://calendly.com/> can help with selecting a meeting time for multiple attendees to avoid back and forth emails to identify the best time and date. These products have both free and paid options.

Organizers should also consider whether, in addition to meeting for specific topics as needed, they will need to schedule regular, recurring meetings with their teams or with clients. Weekly or bi-monthly meetings with employees can serve as useful "check-ins" in a remote office environment where there are fewer opportunities for coworkers to discuss smaller topics during everyday interactions at the office. While structured check-ins can seem forced, they provide a sense of community and engagement, along with the opportunity for informal feedback. These check-ins can be combined with regular updates about the organization, projects, and support offerings such as trainings and counseling.

Importantly, meetings do not need to replace all conference calls or email communications. Sometimes, for shorter meetings, a conference call works just fine. Online meetings are merely another tool that can be used to enable communication, when appropriate, and bridge the gap between the typical office environment and remote work.

Confidentiality and privilege

If you are discussing confidential, privileged or sensitive information with a client, or confidential information in an internal meeting, it is important that all participants are in a location that ensures that the conversation will not be overheard.

If this level of privacy is necessary, participants should avoid public settings or, if that is not possible, participants should wear headphones so that others cannot hear. If confidential information is going to be displayed, any participant in a public setting should close their laptop and dial in to audio-only mode using headphones. Participants can also consider using privacy screens, which are polarized plastic filters that can be attached to computer screens. These screens limit the visibility of a computer screen for anyone other than the user.

If you cannot communicate confidentially and privately, reschedule the online meeting for another time when all participants can join without being overheard and without potentially compromising confidential information. Organizers should also be aware of whether there is the option to include a password to enter the online meeting or a code for added security.

Recorded meetings

Most of the online platforms outlined above offer the ability to record an online meeting. Organizers of internal online meetings (within your organization) should consider whether such meetings will be recorded. It can be useful to record an online session in the event that not all participants are able to join or if some members of your staff do not have reliable internet access. On the other hand, knowing that a meeting is being recorded can be intimidating.

Note: *When deciding whether to record an online meeting, know the rules. Some jurisdictions may require that all participants be given advance notice of recording. Regardless of the rules in your jurisdiction, the best practice is to **always provide advance notice**. No one should be recorded without their knowledge and consent.*

Once a meeting is recorded, the organizer loses some measure of control over the video's storage and sharing if made accessible to others. It should be noted to participants whether the recording can be shared, if at all, beyond those who participated.

Camera use – set expectations in advance

In many situations, it is best if all participants use their computer/mobile phone cameras to create a sense of community and engagement similar to an in-person meeting. However, most online meeting platforms allow participants to join a meeting in audio-only mode and without the use of the camera. As organizations increase their use of online meetings, there may be confusion as to whether participants or attendees will be expected to have their cameras turned on, whether turning on the camera is optional, or whether only the presenter will be on camera. For that reason, online meeting organizers should make it known in advance whether participants are expected to turn on their cameras. Participants do not want to be surprised about this issue. As discussed above, advance notice is also necessary so that participants can dress appropriately and ensure they are in a location from which they can join.

Providing a dial-in option

Most online meeting platforms are internet-based. To accommodate participants who may have unreliable internet service, organizers of online meetings should consider providing a phone dial-in option to ensure that participants are not prevented from joining the meeting or participating. This is especially important where access to a reliable internet connection or certain technologies, such as a laptop or smartphone, may be difficult. Online meetings have benefits, but the underlying reason for hosting such meetings is to enable communication. It is important to ensure that video conferences do not further isolate employees due to lack of access.

Testing

Both participants and organizers should test these technologies ahead of time to ensure that any issues are resolved before a meeting. This is particularly true if the technology is being used for the first time. Meeting organizers should confirm that their internet connection will allow them to stream video and audio without delays. Organizers can also send a summary in advance of the online meeting that discusses how to use the technology so that employees can become familiar with the platform before the meeting. Many online meeting platforms provide simple guides to their technology on their website for this purpose.



ATENEO DE MANILA UNIVERSITY
ATENEO HUMAN RIGHTS CENTER

**CASE STUDY - ATENEO HUMAN RIGHTS CENTER –
 ONLINE LEGAL COUNSELING**

(<https://www.ateneo.edu/ateneo-human-rights-center>)

Location: Makati City, Metro Manila, Philippines

Service: Free online legal assistance and Know Your Rights information through Facebook and Facebook Messenger

Logistics: Individuals may submit questions via direct message to the AHRC Online Legal Counseling Facebook page (<https://www.facebook.com/AHRCOnlineLegalCounseling>), where a team of law student interns and supervising lawyers answer the questions from Monday to Friday, 9 a.m. to 5 p.m. PHST. AHRC posts Know Your Rights infographics and information on its Facebook page as well. Questions are screened and prioritized based on urgency, including whether or not they are related to COVID-19. Urgent questions are answered within two hours, and non-urgent questions are answered within 24 hours. If a question is more complicated and requires further action, AHRC acts as a conduit and referral service, referring the individual to other legal service providers who are part of a legal hub formed in partnership with the Commission on Human Rights or to an individual lawyer. Inquiries that involve particularly sensitive issues, such as domestic violence or whistleblower matters, are typically taken offline, and communications resume through text or call. After a question is answered or redirected to an outside organization or lawyer, the student intern and supervising lawyer populate a password-secured Google Sheets spreadsheet with information about the matter.

Since its inception in March 2020, the AHRC Online Legal Counseling project has helped approximately 600 individuals receive free legal assistance. They have appreciated the AHRC team’s responsiveness and personalized answers in the user’s local dialect.

Impact: Since its inception in March 2020, the AHRC Online Legal Counseling project has helped approximately 600 individuals receive free legal assistance. They have appreciated the AHRC team’s responsiveness and personalized answers in the user’s local dialect.

Key Lessons: The service is constantly evolving and improving, particularly through feedback from student interns on creative ways to reach more people. Recommendations from AHRC include:

- Establish a written, formal protocol and an FAQ bank for easy reference;
- Moderate the comments and posts on the page, and remind users to send private, direct messages as opposed to commenting publicly;
- Prioritize the questions and set online and offline times (e.g., on Facebook, setting the activity status to “Away” during non-business hours);
- Tap into your network, which requires establishing goodwill with those who may serve as valuable resources;
- Aim to educate people by not only providing them with the answers they think they need, but also providing them with information they should have moving forward; and
- Ensure that the individual understands the answer and their rights clearly.



BEST PRACTICES FOR VIDEO SET UP

Background

In advance of an online meeting, participants and organizers should evaluate their camera and room set up. Unlike an office environment, everyone will be able to see other participants' homes or remote work locations. Participants should ensure that the area in view around them, as reflected in the video meeting, is professional and clean. For example, as much as possible, avoid having open closets, an unmade bed, or a messy environment visible. Some platforms, like Zoom, allow the participant to choose an alternative background to digitally replace the space around the participant with an image of the user's choice.

To the extent possible, background noise should be limited to avoid disruptions. If participants cannot fully eliminate background noise, they should mute their microphone when not actively speaking and consider using a headset. At the beginning of an online meeting, the host should remind participants to mute their audio if there is background noise. Meeting organizers typically have the ability to mute participants and should understand how this function works in advance of a meeting.

Lighting

When appearing on camera during an online meeting, lighting is important. Either too much or too little light can prevent others from recognizing you and can be distracting. While a home working space may be subject to lighting limitations, these tips will help to ensure the best results:

- Lighting should be even and should not come from behind (backlit). Be aware of windows behind you, especially during the brightness of the day. If a person is backlit, they will often appear as a silhouette.
- Overhead lighting should not be too harsh, which can distort the participant's features.
- Both backlighting and harsh overhead lighting can be addressed by using a lamp in front of the participant, by turning on additional lights in the room (which creates lighting from several angles), or by moving the laptop or camera so as not to have a bright window behind the user during the meeting.

Note: *Natural lighting changes throughout the day. Just because there is good lighting in the morning does not necessarily mean there will be good lighting in the afternoon.*

This may require changing the camera orientation or changing locations altogether.

Camera orientation

The camera or laptop should be set at eye level and relatively close to the participant. The participant's head and shoulders should be visible and centered in the video, with some empty space surrounding them on the top and sides.

Screen sharing and remote desktop

One useful option for online meetings is the ability for the host (or participants) to share their screen with the other attendees. This can be helpful to show visual aids, such as PowerPoint slides, or demonstrations. Users should ensure that the information reflected on their screens is acceptable for viewing by other attendees, especially if the screen is shared in advance of displaying the materials. It may be helpful to turn off or restrict messaging or other notifications while screen sharing. Some platforms allow for only specific applications to be shared as opposed to the full screen, which further minimizes the risk of sharing unintended information.

Practice opening and closing what you will share in advance. If you are sharing multiple items, place them all into a single folder on your desktop so that all of the material is in one location and easy to access. If you are sharing a PowerPoint, remember to launch it prior to your presentation rather than scrolling through the slides in the editor mode.

Accessibility

Consider whether the meeting will be appropriately accessible for the participants. Some platforms provide closed captioning or allow for the integration of third-party closed captioning programs. Zoom, for example, allows the organizer or another attendee chosen by the organizer to add closed captioning during a meeting by typing what is being said or to integrate third-party applications. Google Meet has a similar option for closed captioning. Video meetings also allow for the option to have sign language interpreters join, such as Zoom allowing for the interpreter's video screen to be pinned or "spotlighted" for added visibility. Additional information on technology-specific accessibility features is included in this guide's descriptions of individual platforms.

BEST PRACTICES FOR LEADING THE MEETING

Organizational

Many of the same strategies used for in-person meetings can be applied to online meetings. Organizers should set clear objectives, create and provide an agenda for the meeting, and establish next steps for attendees to follow after the meeting ends.

Presenters should decide whether their presentations will be scripted or unscripted. Both approaches provide their own benefits and will likely depend on the nature of the presentation. Scripted presentations may be preferable if the meeting will be recorded for circulation, as more formal dialogue will help to ensure that all points are made concisely in that context. However, reading directly from slides or a script is not ideal. An unscripted approach might be more appropriate for brainstorming sessions and informal meetings.

Efficiency

Presentation length should be minimized, as it is harder for attendees to remain focused and engaged in an online meeting as compared to an in-person meeting. If possible, online meetings should be limited to one hour or 90 minutes at the most. If the meeting is going to be longer than an hour, organizers should plan for breaks. Any limitations or use constraints related to the meeting platform should be taken into consideration when planning.

Engagement and interaction

Even if employees typically speak up during in-person meetings, the change to an online setting may result in less participation. Time can be set aside in the beginning of the meeting, especially as people join over the first few minutes, to ask for updates as to how people are managing during the pandemic. This can help to break the ice and get people comfortable talking over video prior to the start of the meeting itself.

Consider appointing a meeting facilitator who can create structure and ensure equal participation. It can be useful to call on people and request their feedback or thoughts during an online meeting, rather than waiting for volunteers. Naming a few people at a time will help to avoid putting any one person on the spot. Use verbal cues to indicate that participants are actively listening, engaged, and empathetic. Designate time during or at the end of the meeting for questions or additional comments.

B. Alternative methods of communicating with employees and clients

When an online meeting is not required or is too formal, consider other communication tools including phone calls, conference lines, SMS/text messaging and instant messaging.

Before you begin your case, establish the methods of communication that will work best for you and your client. If internet connectivity is an issue for the client, default to using the phone or text messaging as your primary mode of communicating, if possible.

When contacting a client for the first time, LSPs should reach out via phone, email or text message before using a video option. Before using any new communication platform (for instance, online video consultations), you should contact your client to prepare them for the platform and explain how to use it.

If the client is comfortable with internet and mobile phone communication, you can use both, but think through which technology is best for which situation (for example, use messaging to set up a meeting and to stay connected during the project, but connect with video to discuss legal issues and make important decisions).

1. MOBILE PHONES

When it is necessary to speak to one single person, contacting that person via mobile phone (call or text) is often the fastest and most efficient way to communicate. If your mobile phone has the capability to “conference in” others, using a mobile phone to talk to two or three people works well. However, if you need to communicate with a larger group, a person-to-person mobile phone communication may not suffice.

Some mobile phones have a Dual SIM option, which lets you use two different phone numbers on one device. This allows you to use one mobile number for business communications and another number for personal communications. Some mobile providers and carriers block Dual SIMS. If you would like to use two SIM cards to keep your personal mobile number private, check with your mobile phone provider or carrier on Dual SIM options.

2. AUDIO CONFERENCE LINES

If there is a need to set up an audio conference call among several people, a conference line provides an easy and efficient way to communicate. Audio conference lines do not include video.

If communicating in this fashion, the host will provide a group of people with a dial-in number and an access code. The host will also have a passcode.

Host access	Participant Access
Dial-In Number: x-xxx-xxx-1234 Access: 12345678 Passcode: 98765 (for Host only)	Dial-In Number: x-xxx-xxx-1234 Access: 12345678

Simply by calling the dial-in number and using the access code, anywhere from two to hundreds of participants can be connected. The only technology required is a cell phone or landline.

FreeConferenceCall.com is a global service that is free of charge with in-country dial-in numbers for 80 countries. Users can host audio conference calls for up to 1,000 participants using dial-in numbers or VoIP.

3. SMS/TEXT MESSAGING AND INSTANT MESSAGING

Short Message Service (SMS) or text messaging and instant messaging (text) are tools often used by LSPs to communicate with clients. Text is a quick and easy way to get in touch with the client (eg, to schedule a call), share some limited information (eg, a quick update on progress, some logistical information such as court dates) and address follow-up questions from the client (eg, providing a personalized answer to a short, follow-up legal question). SMS/text messaging can also be used internally by LSPs to communicate with employees and staff.

With client-facing communications, it is important for LSPs to ask the client during intake if they have a mobile phone and, if so, to obtain mobile phone numbers along with permission to call and send texts to the client. You should always confirm whether it is the client's preference to communicate this way, particularly if the phone is shared or there are domestic risks involved (eg, the client is living with an abuser). If a client suspects that they are under surveillance by the government or other groups, it is also important to consider whether their phone or other devices might be compromised or whether the conversation will put them at risk.

SMS/text messaging platforms

If you are comfortable sharing your personal phone number with the client, or with employees and staff, you can use regular text messaging to set up a meeting, to discuss logistics, or to otherwise communicate. But be aware that text messaging is not confidential.

When sharing confidential, private or sensitive information, text messaging should not be used.

Text messaging charges depend on the mobile phone provider. If the client is from another area or country, always double check whether there are any additional charges for texting a mobile number.

Aside from direct text messaging from your mobile phone, there are a number of platforms that provide SMS and instant messaging services. Some of these services, like WhatsApp, are very popular globally. It is entirely possible that your clients, employees and staff already use one or more of the platforms identified below.

WhatsApp

(<https://www.whatsapp.com/>)

Description

WhatsApp is a free instant messaging platform that is popular globally and requires internet access. It is a cross-platform messenger app for smartphones but is also available as a desktop version. WhatsApp has voice and video call options and allows users to send photos or documents.

WhatsApp is linked to a phone number, so you will need to know your client's phone number to connect. The client will have access to your phone number as well. WhatsApp offers strong end-to-end encryption by default, meaning nobody can see any of your correspondence except you and the person with whom you are chatting.

Cost

WhatsApp is a free messaging app, but it requires access to the internet. Internet charges depend on the mobile/internet provider.

Signal

(<https://signal.org/>)

Description

Signal is a cross-platform encrypted messaging service that uses the internet to send one-to-one and group messages, which can include files, voice notes, images and videos. It can also be used to make one-to-one voice and video calls. Signal uses standard cellular telephone numbers as identifiers and secures all communications to other Signal users with end-to-end encryption. Users can independently verify the identity of their contacts and the integrity of the data channel.

Cost

Signal is an independent nonprofit and the app is available to users for free, but it requires access to the internet. Internet charges depend on the mobile/ internet provider.

Wire

(<https://wire.com/en/>)

Wire is an encrypted communication and collaboration app available for iOS, Android, Windows, macOS, Linux, and web browsers such as Firefox. Wire offers a collaboration suite

featuring messenger, voice calls, video calls, conference calls, file-sharing, and external collaboration – all protected by secure end-to-end-encryption.

Cost

Wire offers three solutions built on its secure technology: Wire Pro – which offers Wire's collaboration feature for businesses for US\$5.83 per user per month; Wire Enterprise – which includes Wire Pro capabilities with added features for large-scale or regulated organizations/ governments for US\$9.50 per user per month; and Wire Red – the on-demand crisis collaboration suite. Nonprofits may apply for a 30-percent discount on Wire's Pro plan at <https://wire.com/en/contact/ngo-discount-request/>.

LINE

(<https://line.me/en/>)

Description

LINE is an instant messaging platform that is popular in Asia.

LINE is similar to WhatsApp in that users can create messages on multiple platforms like smartphone, tablets and personal computers (Windows or Mac) and send them to LINE contacts. The application also allows free voice and video calls.

Cost

LINE is a free messaging app, but it requires access to the internet. Internet charges depend on the mobile/ internet provider.

Telegram

(<https://telegram.org/>)

Description

Telegram is another instant messaging platform. In terms of features, it is very similar to WhatsApp and LINE.

Cost

Telegram is a free messaging app, but it requires access to the internet. The internet charges depend on the mobile/ internet provider.

Slack

(<https://slack.com/>)

Description

Slack is a channel-based messaging platform. Channels are dedicated spaces organized by clear naming conventions. Channel discussions are focused on specific topics and are easily discoverable. Using Slack, users can create messages on multiple platforms like smartphones, tablets and personal computers (Windows or Mac). Detailed instructions on how to send and receive texts through Slack are available at <https://slack.com/help/categories/200111606#work-in-channels>

Cost

There are various plans at different price points. Slack's pricing is available at <https://slack.com/pricing>. The free version allows messaging and will store a limited number of your most recent messages. Paid versions will store unlimited message history. The free version of Slack should be sufficient for one-on-one communications with clients.

Slack also offers free and discounted plan upgrades for nonprofit organizations at <https://slack.com/help/articles/204368833-Slack-for-Nonprofits>.

FrontlineSMS

(<https://www.frontlinesms.com/>)

Description

FrontlineSMS is open-source SMS (or text messaging) management software that runs on a laptop connected to a GSM modem, a mobile phone, or an online SMS service. It enables users to send, receive and analyze SMS texts sent over a mobile network. Instructions on how to get started on FrontlineSMS are available at <https://frontlinecloud.zendesk.com/>.

This software allows you to send SMS to phone numbers in many countries, even if you are not physically based in the country you are messaging. However, if you are not physically based in the country you are messaging, you may need an SMS aggregator. An SMS aggregator (or provider) is an online gateway that connects the Frontline workspace to the cell phone carriers authorized to operate within the country you are messaging. FrontlineSMS has a few SMS aggregators listed directly in the app, including [Twilio](#), [Nexmo](#), [Clickatell](#) and [World-text](#).

Cost

Although the app itself is free, FrontlineSMS is a paid service. Based on its website, projects usually begin with a small up-front setup package combined with a small monthly subscription fee. Typical costs are US\$1.00 per month plus US\$.0075 per text message (sent or received) of 160 characters. Since FrontlineSMS works with mostly nonprofit organizations, it does not grant discounts based on nonprofit status. However, FrontlineSMS can offer flexibility if pricing is the primary barrier to adoption. To inquire about flexible arrangements, email info@frontlinesms.com.

Viber

(<https://www.viber.com/en/>)

Description

Viber is a cross-platform VoIP and instant messaging software application for the Android, iOS, Microsoft Windows, macOS and Linux platforms. Users are registered and identified through a cellular telephone number, although the service is accessible on desktop platforms without needing mobile connectivity. In addition to instant messaging, it allows users to exchange media such as images and videos. Viber has end-to-end encryption. You can verify the identity of the person you are chatting with by exchanging secret keys.

Cost

The main Viber service is available at no charge. Viber also provides an international landline and mobile calling service called Viber Out that is available for a fee.

4. BEST PRACTICES FOR SMS AND TEXT MESSAGING

Text messages should be brief, focused and straight to the point. They should be easy for the client to read and understand. Texts should contain fewer words than a regular email and should contain one essential point per text. Try to avoid long sentences and legal terms in a text. When using a platform on your computer for texting, remember that reading a text from the mobile device's small screen will be different from reading the same text from a computer or tablet's larger screen. LSPs should be cautious of providing any complex or detailed legal advice in text form due to the limitations of this method of communication.



CASE STUDY - KITUO CHA SHERIA – M-HAKI

(<http://kituochasheria.or.ke/>)

Location: Nairobi, Kenya

Service: Free legal assistance through SMS

Logistics: Individuals may submit questions via SMS to Kituo Cha Sheria (KITUO) through its dedicated mobile number, and KITUO lawyers and volunteer advocates answer the questions within 48 hours between Monday and Friday, 8 a.m. to 5 p.m. EAT. The user incurs no additional costs besides normal SMS costs. Individuals may also send questions via Twitter, Facebook, or email. A client who asks a question on a social media platform will be told to submit the question through the M-HAKI platform. Certain hashtags, such as #MHAKI, #Kituo, and #HAKI, are recognized and those questions are automatically forwarded to the M-HAKI platform. All questions are then answered on the M-HAKI platform. Before engaging on the M-HAKI platform, users sign a code of conduct with KITUO, establishing a client-attorney relationship and the scope of the engagement. If a matter requires specialized work, the lawyer will refer the individual to an outside organization.

KITUO received financial and technical support from the Netherlands Embassy, USHAHIDI, HiiL and several national organizations to create, develop, and launch the M-HAKI platform. In preparing to launch the service, KITUO spent one year surveying Kenyans on how they would best like to receive legal aid and what price they would be willing to pay for such a service. Development of the M-HAKI platform commenced in 2015, and it was officially launched in March 2016.

Impact: Haki Mkononi means “justice in your hands” in Swahili. Since its inception in 2016, KITUO’s M-HAKI has helped approximately 7,300 individuals receive free legal assistance by providing access to justice in the palms of their hands. KITUO receives around 50 questions per day. When there is new community activity, such as new COVID-19-related orders, they may receive around 200 to 300 questions per day.

Key Learnings: KITUO has constantly improved and made enhancements to M-HAKI over the years. Some recommendations from the KITUO’s M-HAKI team include:

- Ensure you have enough work force, whether full-time employees or volunteer advocates, to keep the service running;
- Have a workable financial plan because although the client does not pay anything, there are costs to maintain a website and service platform;
- Try working toward having a 24-hour service; and
- Remember that it requires time, research, and dedication to answer all questions and follow-up questions.



Hotlines

Legal service hotlines have always been remote. By their nature, hotline interactions between LSPs and their clients and the public are not face-to-face. As the current global pandemic calls for new or expanded provision of remote legal services generally, LSPs may seek to establish new, remotely operated hotlines to replace or supplement services historically offered face-to-face, or to expand existing hotline services. To help organizations make this transition in a manner that best aligns with their mission and resources, this section addresses examples of hotlines, best practices for both general and remote hotline operations, and technology tools to support these operations.

A. Examples and service models

Hotlines can be used as the primary mode of providing legal services or as a complementary mode to supplement other in-person or remote services. Examples of hotline uses include:

- Providing brief legal services that:
 - Answer simple legal questions;
 - Convey general information regarding the law; and
 - Supply “non-legal” but important information such as the location, operating hours and contact information for local government offices, important businesses and other social service organizations.
 - Addressing time-sensitive, high-priority legal issues; and
 - Screening and referral for more involved legal services.
- Although hotlines can be used to address a broad range of legal topics, hotlines naturally align with the provision of legal services relating to common legal needs. These include:
- Family law and domestic violence;
 - Elder law, including issues related to wills, guardianship, abuse and neglect, and fraud;
 - Employment and labor law, including wrongful termination and workplace violence;
 - Asylum and immigration law, including internally displaced persons;
 - Landlord/tenant disputes, including wrongful eviction; and
 - Consumer law, including issues related to consumer credit and loans, debt collection and bankruptcy, automobile purchase/repossession, and warranties.

There are several service models under which hotlines can operate. These service models are not mutually exclusive and some LSPs use two or more of these models to provide legal services:

- Live calling only: Under this model, callers dial the hotline number during specified days/hours and reach a live individual (attorney, paralegal, volunteer, or other legal advocate) who can assist them.
- Voicemail only: Under the voicemail-only model, a caller dials the hotline number at any time and leaves a voicemail with her/his contact information (eg, phone number, email) for follow up by a staff member or volunteer.
- Hybrid: This model involves a mix of live calling and voicemail. It could also include a web-based live chat, if the technology is available. A key benefit of this option is that it allows people to reach live individuals for urgent matters or during business hours but does not limit service time to a set number of hours a day, which often overlaps with hours when clients also work.
- Pre-recorded information: Under this model, also known as IVR (Interactive Voice Response), callers dial the hotline number to obtain pre-recorded information on one or more topics, which can be accessed by selecting digits on a touch-tone telephone or through voice command.

Hotlines can be used as a primary mode of providing legal services or as a complementary mode to supplement other in-person or remote services.

B. General best practices for hotline operation

Building a hotline from the ground up can be challenging. To the extent possible, LSPs should build upon or repurpose policies, procedures, resource materials and other remote service models they may already provide or to which they have access. Further, just because a hotline is remote and seemingly less formal than a direct face-to-face consultation, it is no less serious. It is important to follow existing ethical and operational best practices, which also apply to hotline management regardless of how operations are structured.

Ethical best practices

- Scope/limitation of legal services. A legal services hotline must ensure that callers are aware of and consent to the scope and limitations of the legal services provided. This typically means clearly indicating that the hotline staff are providing legal information and advice, but not representing the client as their attorney.
- Compliance with applicable law. The hotline must operate in compliance with all applicable laws, regulations and rules, including procedural rules of local courts, rules and ethical considerations applicable to the provision of legal services in the provider's jurisdiction, and laws and regulations applicable to telephonic communications and data privacy.
- Third-party callers. The provider should adopt procedures addressing ethics issues arising when third parties contact the hotline on behalf of someone else.
- Confidentiality and privacy. The provider must ensure that a caller's privacy is protected and that communications are kept confidential.
- Competence. Measures must be taken to ensure hotline staff and volunteers provide competent advice and accurate information.

Operational best practices

- Timely service. Hotline calls should be routed and answered in a manner that prevents delay. Staff and volunteers should try to both triage and provide quick responses to caller inquiries. If callers are put on hold, they should be told the purpose of the hold and given a reasonable expectation of how long the hold will last.
- Call backlogs. If the volume of callers to the hotline is heavy, the provider should establish a procedure to manage backlogs. Callers should always be informed of wait times to manage expectations.

- Transparency. When a caller requests information that is not within ready access of the staff member or volunteer handling the call, the caller must be informed that the issue is beyond the scope of the services provided and, where possible, a referral provided. In certain circumstances, the staff member or volunteer could agree to research the issue and arrange for a return call to provide the appropriate advice or information.
- Referrals to other LSPs and non-legal resources. In some circumstances, it may be appropriate to refer the matter. The provider should establish a policy for the referral of callers to other LSPs or a local bar association when appropriate and available. The provider may also wish to maintain information about non-legal services (eg, housing, employment, education, food distribution, etc.) that may assist hotline callers with their problems.
- Manage caller expectations. Callers looking for assistance may not be aware of the provider's current hotline-related challenges and may grow frustrated with any service interruption or elect to forego services entirely. To offset this risk, the provider may need to communicate issues it is experiencing, both through telephonic means (eg, pre-recorded messages, scripts for staff and volunteers, etc.) as well as through other channels (eg, websites, social media accounts, printed materials). Alerts and reminders can also be sent to customers via email or text as needed. This can also create opportunities to direct callers to self-service alternatives where relevant and available (eg, government websites and other legal service providers operating from different platforms).
- Increase staffing flexibility and improve scheduling mechanisms. Increasing hotline staffing flexibility can aid in maintaining a consistent caller experience. Staff and volunteers can be scheduled over a more diverse range of time slots, potentially allowing limited teams to expand service periods. Increased staffing flexibility may require a need for improved scheduling mechanisms. Larger hotline operations may benefit from adopting scheduling software or more robust workforce management software solutions.
- Staff resources. Staff members and volunteers must be provided with the informational resources needed to offer meaningful services based on the hotline's service model.

These resources might include training and onboarding, substantive information on key legal issues/areas of law (eg, manuals, primers, online resources/libraries), information on developments related to emergency situations, forms and community education brochures. These resources need to be kept up to date, and are often collected in a central, searchable database.

- **Staff and volunteer supervision.** Supervisory staff should review the work of those providing legal services and information, including listening in on calls and reviewing past calls (with the consent of the caller).
- **Caller screening.** The provider should screen hotline callers for potential legal needs, possible conflicts of interest, and eligibility for services. Hotline staff and volunteers should assure callers of the confidentiality of the screening process and emphasize the need for truthful disclosures.
- **Recordkeeping.** The provider should establish a system (manual or electronic) for documenting key administrative and service-related information, including information pertaining to intake, caller issues, services provided, and necessary follow-up.
- **Quality control and client feedback.** The provider should periodically assess the services provided through the hotline and identify opportunities for improvement. This may involve analysis of response times and legal issues addressed. It may also include feedback from staff, volunteers and callers through surveys.
- **Outreach.** Outreach can help to increase community awareness of the services provided. Outreach can be accomplished through flyers, local elected officials or aligned community service organizations, newsletters or website, community bulletins on TV or radio stations and “earned media” (seeking out news outlets looking for social good stories or to provide information to their communities or readership regarding available services).
- **Multilingual support.** The provider should ensure that the hotline is accessible to as many people as possible. In areas where multiple languages are spoken, this may include hiring staff that are bilingual or multilingual, including language options for any pre-recorded messaging, and translating community information about the hotline into all relevant languages.

C. Technological tools

Remote operation of a legal services hotline typically involves using a mix of technology to support key

components of hotline operations. Tools to assist with the two most critical aspects of remote operations, including directing, receiving and responding to customer calls and documenting administrative and service-related information, are discussed below.

Inbound call management

Historically, LSPs operating hotlines received and responded to inbound calls from clients or the public using telephone equipment and routing technology that was owned, hosted, and maintained by the service provider (known as an on-premises model). In recent years, advances in technology have pushed many providers to move to a virtual (remote) hotline model using a cloud-based call center solution. This virtual model permits staff and volunteers to work from home or any other location instead of in a centralized office or call center.

A cloud-based call center solution automates and standardizes the process of receiving and responding to hotline calls and may include additional features that make hotlines more efficient. These include:

- Call routing by language and/or geographic area;
- Access for callers with speaking or hearing disabilities through TTY or relay;
- Review/analysis of busy signals, wait times, dropped calls, etc.;
- Technology to facilitate an efficient callback system because putting a caller in a queue uses the caller’s minutes and can drain a mobile phone battery; and
- Providing recorded information to the caller while waiting on hold or when the caller calls in after hours.

While cloud-based call center software provides significant functionality, there are costs and disadvantages to consider. These include costs associated with software licenses and dependence on cloud providers for upgrades and support. Many of these platforms use VoIP to facilitate voice communication over the internet. This increases dependence on high-speed internet access (which may not be widely or routinely available to staff and volunteers) and may have limitations due to bandwidth requirements. Some examples of cloud-based call center software platforms used by LSPs operating hotlines include **Vonage** (<https://www.vonage.com>), **Talkdesk** (<https://www.talkdesk.com/>), **Five9** (<https://www.five9.com/>), and **Genesys** (<https://www.genesys.com/>).

Documentation of administrative and service-related information

In addition to management of inbound calls, remote legal services hotlines also require a tool or tools to document information provided by and to callers and to track services provided and the resolution of issues. Historically, hotlines relied on simple databases (sometimes developed internally) or manual entry of information into logs and spreadsheets to record this information. For LSPs with low hotline call volumes and/or limited resources for acquisition of technology, these tools may continue to be effective. However, LSPs with higher call volumes may want to consider the adoption of either a legal case management system or a customer relationship management (CRM) application.

Case management systems (discussed in greater detail below) permit an organization to track a legal matter through its life cycle, from intake to case closure. Many systems also facilitate communication and collaboration, as well as data analysis and reporting. There are case management systems for all segments of the legal marketplace, including some designed for small organizations. Well known providers include Clio (<https://www.clio.com/>), Zola (<https://zolasuite.com/>),

Needles (<https://www.needles.com/>), MyCase (<https://www.mycase.com/>), and Microsoft Teams (<https://www.microsoft.com/en-us/microsoft-365/microsoft-teams>).

Customer relationship management (CRM) applications are broadly used to document and manage “customer” relationships. In the context of call centers (the closest analogy to a legal services hotline), CRM applications permit staff to codify and track interactions with callers. CRM applications range from robust enterprise platforms to smaller, bespoke solutions. Some of the larger platforms integrate with the cloud-based call center solutions described above. Well-known providers include **SalesForce** (<http://www.salesforce.com/>), **Keap** (<https://keap.com/>), **Less Annoying CRM** (<https://www.lessannoyingcrm.com/>), **Hubspot** (<https://www.hubspot.com/>) and **Zoho** (<https://www.zoho.com/>).

Vendors of both legal case management and CRM applications offer cloud-based tools, making information accessible to remote staff and volunteers. However, as with cloud-based call center software, use of these platforms requires internet access by staff and volunteers and typically comes with monthly or annual licensing fees.





CASE STUDY - ECOLEX – LINEA VERDE

(<http://www.ecolex-ec.org/>)

Location: Ecuador

Service: Free hotline and legal services for environmental law and land rights issues

Logistics: Established in 2005 before cell phones and social media platforms became the norm, Linea Verde (<http://www.ecolex-ec.org/index.php/proyectos/linea-verde>) is a free landline hotline where individuals across Ecuador may receive assistance with their environmental law and/or land rights issues. Before Linea Verde, ECOLEX addressed the access to justice gap and provided outreach to rural areas through its community paralegal program. The community paralegals often called the ECOLEX lawyers with questions about cases they were working on. ECOLEX realized that it could provide their free legal services permanently and directly through a free hotline, the first of its kind focusing exclusively on environmental law matters.

Individuals call the free hotline, and two ECOLEX lawyers answer the phone calls. When the lawyers are working remotely, the calls are forwarded to their personal cell phones. When an individual calls, the ECOLEX lawyers go through a set of seven to eight questions as part of the intake process.

They ask information about the caller, including whether he or she permits use of his or her name or would rather remain anonymous. The first step is to clarify if the caller is seeking legal advice or to file a complaint. They also ask the caller if he or she has contacted local authorities, such as the local municipality, environmental office, or ombudsman, before calling ECOLEX. If the caller has made a complaint to local authorities and they do not resolve the issue within three weeks (15 business days), ECOLEX will reject the case. After agreeing to take on the case, ECOLEX will continue to communicate with the client in order to investigate the issue and draft and present the complaint to relevant authorities. If a crime has been committed, ECOLEX will forward the complaint to the prosecutor in the province or another authority.

The costs incurred by ECOLEX are minimal and include a monthly fee for the phone services. ECOLEX advertises Linea Verde through its social media accounts and its website. It also has distributed posters in strategic places across the country with information about the hotline and an agriculture calendar for farmers to use. Since March 2020, most callers have found out about Linea Verde through the internet.

Impact: The ECOLEX lawyers typically receive 30 to 50 calls per year. From January to June 2020, they received 65 calls, most of which were between March and June. Since June 2020, they have received 40 calls. Approximately 60 percent of the calls are about contamination and pollution issues.

Key Lessons: ECOLEX recommends allowing anonymous participation from callers, because individuals may be afraid to report violations. In such cases, an organization may offer protection to their clients by allowing them to submit anonymous tips. ECOLEX also recommends reaching out to universities whose students may be willing to assist with staffing the hotline and drafting documents. In addition, the organization has found that more people are accessing the internet due to remote working; therefore, advertising on social media networks is a good use of resources. Finally, ECOLEX recommends getting creative in your outreach. ECOLEX has used art in promoting access to justice, with artistic posters, pamphlets, and videos placed and shown throughout the country. ECOLEX has found that the use of art is a successful and fulfilling way of promoting its message.



Online workshops and clinics

A. Know Your Rights workshops/webinars

Know Your Rights (KYR) workshops can be a vital opportunity to provide community legal education and empowerment so that individuals have some guidance and an overview of information and resources they can use to move forward on their own (pro se) in relation to legal issues they may be experiencing. The key objective is for individuals susceptible to a specific legal problem to gain a better understanding of their rights, how they can use those rights to access remedies, and where they can go for further help. KYR workshops are often integrated into community organizing and advocacy strategies.

Topics covered by KYR workshops are wide ranging; however, frequently covered topics include:

- Asylum and immigration law;
- Protesters' rights and responding to abuse by police;
- Family law, including domestic violence;
- Labor law, including wrongful termination, workplace harassment, and other employment issues;
- Landlord/tenant law, including wrongful eviction; and
- Land and real estate law, including inheritance.

Running KYR workshops remotely provides a valuable opportunity to reach a broader audience without the limits of geography. A number of the best practices referred to below will apply both to KYR workshops that are run in-person and those online. Those run remotely will likely require more detailed consideration in advance to ensure that participation in the workshop is accessible to all, which may include both multilingual support and access for persons with disabilities.

Webinars

A webinar is an interactive online seminar that anyone with an internet connection and the necessary software can view over the web. The webinar can include video of the presenter, slideshows, or other visual elements. Webinars are flexible regarding format. The content in a webinar can be recorded and shared or repurposed in a variety of formats. Webinars are also ideal for allowing two-way communication between the presenter(s) and the audience.

If clients have a question about the presentation, they can ask it in real time via audio or chat, which may help eliminate barriers. This means webinars are ideal for KYR workshops and can allow the workshop to be more interactive and engaging – indeed more similar to an in-person workshop.

For small workshops, the video conferencing techniques referenced previously in this guide should serve you well. However, standard video conferencing tools generally tend to lose their effectiveness at around 30 to 50 participants. There are some features of dedicated webinar platforms that make them more suitable for larger crowds. For example, webinars can limit the number of “speakers” that participants can see, creating an environment that mimics a panel discussion. Note that dedicated webinar platforms generally tend to be more expensive than standard video conferencing options. A few examples of dedicated webinar platforms are:

- [Livestorm](#) – an easy-to-use platform that does not require the attendee to download or install anything. It also has a range of features, including attendee analytics. Livestorm has a free option, but it is limited to ten attendees and 20 minutes per webinar. Paid plans start at US\$99 per month. Livestorm also offers nonprofit pricing. To inquire about plans for nonprofits contact: sales@livestorm.co. <https://livestorm.co/pricing>
- [GoToWebinar](#) – a popular option due to its functionality and audio-video quality. Many of its features may be useful for the more engaged webinar hosts, including engagement dashboards and the ability to poll attendees. Plans start from US\$49 per month. <https://www.gotomeeting.com/webinar/buy/lite>
- [Zoom Webinar](#) – an add-on package to Zoom Conferencing (described above), Zoom Webinar provides additional functionality, including polling tools, a “raise your hand” feature for Q&A, and live streaming to YouTube. Requires a Zoom plan and an additional cost of US\$49 per month. <https://zoom.us/zoomrooms>

Best practices relating to KYR webinars and workshops

- The most effective workshops are often led by respected community leaders and organizations. Good partners – eg, community centers, organizing coalitions, faith-based organizations, or treatment programs – are made up of members of the community, know the community's needs, and can get the right people to show up and engage.
- You may want to consider sending slides and other materials to attendees in advance so that they are familiar with the topics and with what will be covered. Also, attendees who have a poor internet connection or encounter connectivity issues during the event may dial in and follow along with the slides.
- Test connections beforehand to make sure everyone can properly hear, and that videos and other visual aids display properly.
- After welcoming people to the webinar or online meeting, explain how the technology works – including how (and when) to ask questions.
- Begin by introducing your organization(s) and the presenters. Consider starting the presentation by asking questions to give the audience an opportunity to contribute and inform the discussion.
- Consider having an ice breaker session in advance of the main presentation to engage your audience and to identify common issues, experiences, and concerns before starting.
- Consider using the breakout room feature to facilitate discussion in smaller groups and further engage participants. Give thought to dividing workshop participants into breakout groups ahead of time in order to avoid creating groups on the fly. However, sometimes allowing the platform to create random breakout rooms is effective; for example, when you have several breakout sessions and want each breakout to have different people.
- Outline what you will be discussing during the event and in what order. Be clear on expectations and objectives. Start your presentation with a clear set of goals and takeaway points (“Here is what we’re going to cover today ... Here is what we are not going to cover today ...”). This is to prepare the audience and ensure they understand what will be covered so that there are no surprises.
- Your goal is to ensure that your audience walks away knowing a few key rights and how to exercise those rights, as well as how to further engage. The best presentations are simple and repeat just a few critical pieces of information.
- When running a remote KYR session, there are effectively no geographic limits to who may be attending. It is important that you frame the presentation appropriately to make clear where the rights which you are discussing apply and to be explicit about their geographic limits or jurisdiction.
- Uploading a PowerPoint or PDF is a great way to share information but sharing applications or your desktop is also a good way to engage attendees. Rather than show a screen shot of a website, go to the website directly and navigate through the content or process you are discussing.
- Use slides to illustrate your points, but not as a visual script. Do not simply read content from a slide presentation.
- Consider allowing participants to ask questions during the event itself, rather than during a specific Q&A period at the end. This will likely lead to spontaneous discussion that will feel real and relevant.
- If using the previous method, participants may have many questions during the event, which might derail the presentation timeline. Have a plan for fact-specific questions that are best answered personally. Consider creating a breakout room after the event or sharing the presenter’s contact information for follow up.
- Consider featuring more active representations of how rights are exercised. Roleplaying real-life examples provides nuance and impact. By exploring multiple versions of the scenario, this can also demonstrate that rights are not one-size-fits-all, and that different scenarios may call for different responses.
- Whether your presenter is bilingual or whether you have translation available, you should ensure that the information is accessible to the community you are serving. This means ensuring that both written and verbal information is available in relevant languages. You may want to consider translating slides in advance into certain languages which you know may be required for the webinar/workshop. Consider whether you need to engage a paid or volunteer translator if there are multiple languages involved.

B. Online virtual clinics

A legal advice clinic is a program that provides free legal services to clients within the community where it is based. Legal advice clinics are essential to provide limited scope legal advice and information to those who cannot afford to pay for legal services. Unless a future engagement is entered into, a LSP's obligation to a client attending a virtual online clinic does not extend beyond the clinic session.

These clinics are usually run in face-to-face advice sessions, and there are different models that can be adopted. For example, some clinics are run on a drop-in basis where they are open to the public without an appointment, and clients are given on-the-spot, face-to-face legal advice.

Others work on the basis of a referral system with appointments for advice sessions made in advance; for example, by potential clients telephoning the clinic and providing brief details of their legal issue so that a determination can be made in advance as to whether it can be addressed by the clinic.

The areas of law to be covered by the clinic are generally limited to specific areas of expertise based on the skills of the lawyers and legal advocates participating, although the number of areas covered within a clinic can still be extensive. The level of advice provided at legal advice clinics can vary:

- Some clinics simply provide basic information, such as giving a client a leaflet or a fact sheet or taking them through standardized information or a form that is not tailored to them individually, but which may help resolve their legal issue.
- The next level of advice is generalist advice, which involves tailoring advice to a client's particular circumstances. This could be a one-off appointment or relate to a client's ongoing needs.
- The next level of advice is specialist advice, for people involved in (or contemplating) legal proceedings.

When setting up a legal advice clinic, it is important to understand what level of advice it is intended to provide, and to ensure that this is clearly indicated on all materials and messaging associated with the clinic.

If you are considering setting up a new legal advice clinic, it is worth considering launching it initially as a pilot to test the water and see how the processes and procedures work in practice.

Best practices relating to online virtual clinics

- Consider whether you want to include any prescreening for eligibility via an intake form. This will assist in determining how to assign clients to volunteer lawyers.
- Consider whether you wish to put limits on the type of cases that are accepted by the clinic to limit the inherent risk in advising on multiple areas of law.
- Consider how you will address conflicts of interest, if necessary, and how you will address a conflict if one is identified.
- Consider producing a user agreement which could be e-signed by the client in which the client accepts the terms and conditions of the clinic and provides consent in relation to client data.
- Carefully consider challenges to the accuracy of information provided by clients, including incorporating note-taking tools to ensure that the data collected is accurate. Always have the client verify that the information is correct.
- Consider outreach. There may be a slow start-up period while clients learn of the service being offered remotely. Consider providing details to frontline staff at social service agencies and community-based organizations to advertise the service. You might also consider using social media to expand your outreach to the community by posting information about the availability of legal clinics, as well as videos and self-help resources.
- Ensure you have a complaints procedure in place, and clearly indicate to participants who to go to if they have a problem.
- Translation assistance and services for the hearing impaired will be more difficult remotely and more coordination will be required to set this up in advance.



CASE STUDY - LEGAL DEVELOPMENT NETWORK

(<https://ldn.org.ua/>)

Location: Kyiv, Ukraine

Service: Free legal assistance through live chat consultations

Logistics: Users may submit their questions on the Legal Development Network (LDN) website, through a dedicated chat box. A pool of over 50 lawyers from 23 LDN member organizations respond to the questions and engage in a live conversation with the user from Monday to Friday during normal business hours. LDN member organizations are scheduled on specific days of the week to provide support for the live chat, which typically involves one lawyer answering around 20 to 30 questions per day. If a matter requires follow-up, the lawyer will send the individual information for a personal consultation with the LDN legal office. If the office is unable to take the matter on, it will refer the matter to one of LDN's member organizations or partner organizations/institutions. However, approximately 95% of questions are resolved in the live chat, and only 5% require outside referrals.

Using funds from a donor organization, LDN contracted with an IT company to develop the software and integrate it into the LDN website in 2017.

Ongoing costs to LDN include paying IT specialists who coordinate the schedule of lawyers and provide technical support to the lawyers during their shifts. The live chat service is publicized on social media and through traffic on the website (more than 50,000 visitors visit the LDN website every month). Many LDN member organizations also promote the live chat feature on their websites.

Impact: In the last two years, LDN has helped 5,912 individuals receive free legal assistance through its online services. In 2019, LDN served 749 individuals online/remotely, and in 2020, it served 5,163 individuals online/remotely. 39% of the beneficiaries live under the national poverty line, and 62% are unemployed. The most common legal issues occur within family law, housing, social protection, labor, and inheritance.

Key Lessons: LDN recommends that organizations hoping to implement a similar service ensure that they have a large pool of member organizations and lawyers who are willing to assist. Organizations should also coordinate with a technical specialist to help with all technical aspects of the platform, such as making shift schedules, notifying lawyer volunteers, and ensuring that any backlogs are cleared. LDN also developed a written guide and video tutorial on how to use the live chat, which it recommends to ensure that the volunteers know how to use the platform. Finally, because not all people who need legal advice have electronic devices with access to the internet, organizations might consider providing legal aid by phone.



Confidentiality and proper handling of documents

A. Confidentiality

Providing services remotely raises legal questions, especially concerning confidentiality and privacy. In most jurisdictions, there are legal obligations to protect client information. Privacy and data protection form the core of the relationship of trust between lawyer and client. Clients rightly expect information to be protected from unauthorized access. LSPs should be aware of, and take technical and organizational security measures for, all client data they process through technology platforms to prevent the disclosure of confidential information by others. The digital technologies and instructions discussed below are intended to assist in understanding and addressing these issues.

1. Use an anti-virus program

One basic security requirement is an active and up-to-date antivirus program. Without it, you run a high risk that information contained on your computer will be subject to disclosure, deletion, or may even be held for ransom. There are thousands of automated port bots that constantly scan routers for open ports for vulnerabilities and then exploit them when detected. But there are safe and reliable free programs on the market, such as **Windows Defender** (included on all Windows computers), **Avira Free Security** (<https://www.avira.com/en/free-security>), **Total AV** (<https://www.totalav.com/>), **Panda Free Antivirus** (<https://www.pandasecurity.com>) and **Kaspersky Security Cloud** (<https://www.kaspersky.com/free-cloud-antivirus>).

2. Use secure communication channels

Email, fax and telephone are part of standard professional communication for the provision of legal services. Also, social media and messenger services are finding their way into modern client communications. These communication channels accelerate the exchange of information, but also demand a greater awareness of confidentiality and the protection of sensitive client data. It is necessary to carefully choose the right channel for each type of information, considering its suitability to protect privacy and confidentiality.

While social media has the advantage of simplicity and convenience in a personal setting, there are

significant disadvantages when it comes to security and confidentiality. It is generally not advisable to use social networks to correspond with individual clients. When receiving a client inquiry via such platforms, LSPs should use secure communication channels – secure email, telephone, or encrypted text messages – for the response. In any case, the communication with a client should never take place in public (eg, by commenting to public posts on social networks).

For email communication and communication through text and instant messaging tools, it is best to use services with end-to-end encryption. End-to-end encryption is a method of data transmission where only the sender and the recipient can read the messages. With end-to-end encryption, the data is encrypted on the sender's system. Only the intended recipient will be able to decrypt and read the message. No one in between can read or manipulate the message. End-to-end encryption thus provides the highest level of confidentiality and protection for digital communication.

As noted previously examples of messaging platforms that provide for safe communication with end-to-end encryption include WhatsApp, Wire and Signal. Another service provider, ProtonMail, is an email program that also ensures end-to-end encryption. The basic account with limited storage and messages per day is free, whereas the upgraded version is around US\$4 to US\$6 per month, depending on the usage, with the possibility of a discount for nonprofit organizations.

3. Avoid open or public Wi-Fi networks

Another way client information can be compromised is through use of open Wi-Fi networks, especially those found in public locations or offered to the public at large. You should always be careful when using open Wi-Fi on a train, in a café, or at a library or other community center. Usually such Wi-Fi networks are not encrypted. This means that any other user could read the data stream between your device and the Wi-Fi router. In the worst case, an attacker could access your device and/or acquire data stored on it. In fact, more and more these days, public Wi-Fi networks

are targeted specifically for this purpose. It is strongly advised not to use public Wi-Fi networks when undertaking confidential or sensitive work. If the use of an open Wi-Fi network is necessary, it is recommended to use a virtual private network (VPN), discussed below.

4. Use password protection for PDFs

Because no system is entirely secure, files that are sent over networks are potentially at risk. Therefore, when sending confidential documents over the internet (eg, a PDF document), it is strongly recommended that they be password protected. Helpful for this purpose is the password protection tool included with **Adobe Reader**. If a PDF is protected by a password, the password must be entered in order to open the document. When transmitting it to others, you must also inform the recipient of the selected password. For security reasons, the password should be sent to the recipient in a separate email, or other mode of communication such as text, call, or message on a messaging platform, from the one with the document attached. In this case, it is best to choose a password that you do not use for other services. Detailed instructions for PDF password protection with Adobe Reader can be found at: <https://helpx.adobe.com/acrobat/using/securing-pdfs-passwords.html>.

5. Encrypt important data

When sending sensitive data, appropriate encryption should be used. Unencrypted data storage devices (external hard disks, USB sticks, etc.) should be upgraded with additional software or hardware. Free file and user-friendly encryption software include **AxCrypt**, **CertainSafe Digital Safety Deposit Box**, **Intercrypto Advanced Encryption Package** and **Cypherix SecureIT**.

6. Use two-factor authentication

A strong password (including symbols, numbers, capitals and a phrase or acronym that is not easy to guess) is an important measure for internet privacy protection. With two-factor authentication, security is increased further, creating an additional hurdle for cybercriminals. With two-factor authentication, access is secured with a second medium, usually a code sent to your email or smartphone.

Many of the most common online communication and document platforms offer two-factor authentication. Detailed instructions on how to set up or enable two-factor authentication for Apple, Microsoft, Google and Dropbox

are found at the following links:

- **Apple** - <https://support.apple.com/en-gb/HT204915>
- **Microsoft** - <https://support.microsoft.com/en-us/help/12408/microsoft-account-how-to-use-two-step-verification>
- **Google** - <https://support.google.com/accounts/answer/185839?co=GENIE.Platform%3DDesktop&hl=en>
- **Dropbox** - <https://help.dropbox.com/teams-admins/team-member/enable-two-step-verification>

7. Activate screen lock quickly when leaving the computer

Your computer workstation should always be protected against access by unauthorized users. The screen saver with password activation is often set up for this purpose. It starts automatically after a certain period of inactivity (usually a few minutes) and virtually “locks” your workstation. If you want to continue working and accessing your programs and data, it is necessary to enter your password. Make sure your computer is set up to activate screen lock after no more than five minutes of inactivity.

8. Use a virtual private network (VPN)

Another way to protect sensitive data is to use a VPN. A VPN is a system of several computers or other devices such as smartphones that exchange data with each other. Only authorized persons can use this particular network and it is not public. The VPN software establishes an encrypted connection to the server of the VPN provider. This connection is called a tunnel. Afterwards, the desired website is opened via the server. The IP address with which a device identifies itself on the internet is replaced by the address of the VPN server. The user is now more difficult to identify.

Good VPN access is especially important for organizations with staff who are on the road or working from home to securely access the organization’s network, check email, and download files. They can work as if they were sitting at the computer in the office. In that case, the VPN ensures that only the users who are authorized to access the network can access the network via username, password and server address.

While VPN is not absolutely necessary for individuals and small organizations, it adds an extra layer of protection. If

you decide to look into setting up a VPN, the key is to find a trusted provider. Ideally, you should research the provider and test the software.

Some of the lower-priced VPN providers (around US\$2 to US\$5 per month) on the market are **Surfshark** (www.surfshark.com), **CyberGhost** (www.cyberghostvpn.com), **NordVPN** (www.nordvpn.com) and **Express VPN** (www.expressvpn.com).

B. Signing legal documents online

When working remotely, service providers (and others) are faced with the challenge of having to sign and transmit legal forms and contracts, internal documents, and client documents.

Several platforms exist for producing legally binding electronic signatures that can be made anywhere and anytime on any device, even without paper and without requiring a printer or scanner. These platforms are typically web-based and require internet access. Because the options and requirements vary in different countries, anyone using this guide should carefully check the ability to use electronic signatures and the enforceability of electronic signatures in their particular jurisdiction.

Below are several companies that offer eSignature tools:

- **Adobe Sign**: Prices vary from country to country but are around US\$20 to US\$30 per month for small businesses and individuals. Discounts may be available for nonprofit organizations (<https://helpx.adobe.com/enterprise/using/non-profit.html>). eNotary services are available. The platform is compliant with US and European legislation. Users should inquire about legal standards on a country-by-country basis.
- **DocuSign**: DocuSign offers a free 30-day trial. At the US\$10 per month level, users are allowed up to five documents. For US\$25 per month, users are allowed an unlimited number of documents. Discounts may be available for nonprofit organizations (<https://www.docusign.com/solutions/industries/nonprofit>). DocuSign also provides eNotary services. According to its website,

DocuSign meets the requirements regarding electronic signatures in a majority of countries around the world.

- **HelloSign**: HelloSign offers a free service for up to three documents per month. The platform is compliant with the UETA of 1999, EU Regulation No 910/2014 and the US Electronic Signature in Global and National Commerce Act of 2000. Nonprofit organizations in need of more than three documents per month may email <https://www.hellosign.com/form/contact-us-general> for special pricing and discount information. (<https://www.hellosign.com>)
- **Docsketch**: Docsketch offers a free service for up to three documents per month, one template, and document reminders. The platform is compliant with US and European laws. (<https://www.docsketch.com>)
- **Signable**: Signable is a pay-as-you-go service that costs US\$1 per document. Signable complies with UK and European Union eSignature laws. Email help@signable.co.uk for more information. (<https://www.signable.co.uk>)
- **SecuredSigning**: SecuredSigning offers a free service for up to three documents per month for a single user. SecuredSigning is compliant with US, European, Australian, Canadian, Chinese, New Zealand, South African and UK laws. It also allows for eNotarization. (<https://www.securedsigning.com>)
- **eversign**: eversign offers a free service for up to 10 documents per month for a single user. The platform is compliant with US and European laws. eversign may offer nonprofit organizations special pricing, which is determined on an individual basis. Email support@eversign.com for more information. (<https://eversign.com>)

For email communication and communication through text and instant messaging tools, it is best to use services with end-to-end encryption. End-to-end encryption is a method of data transmission where only the sender and the recipient can read the messages.



CASE STUDY - KIDS IN NEED OF DEFENSE (KIND)

(<https://supportkind.org/>)

Location: Various locations in the United States

Service: Kiosk for remote participation in video calls and mobile phone distribution program

Logistics: With its California-based offices in Los Angeles, San Francisco, and Fresno, KIND saw a need to reach its clients (mainly unaccompanied migrant children) in the underserved, rural areas of the state. One method was establishing a self-serve kiosk, or “virtual office,” in Mendota, California, where clients can participate in meetings with KIND staff and pro bono volunteers through a touchscreen laptop. The laptop in the kiosk only runs Skype for Business, which makes it simple to use for the clients. Clients go into the kiosk with their sponsor or with a KIND staff member waiting at the kiosk, start the laptop, and sign into Skype. KIND purchased a refurbished laptop used in the kiosk, and it is locked into a stand that is locked to a desk, providing security. KIND hopes to expand this service throughout the country and internationally.

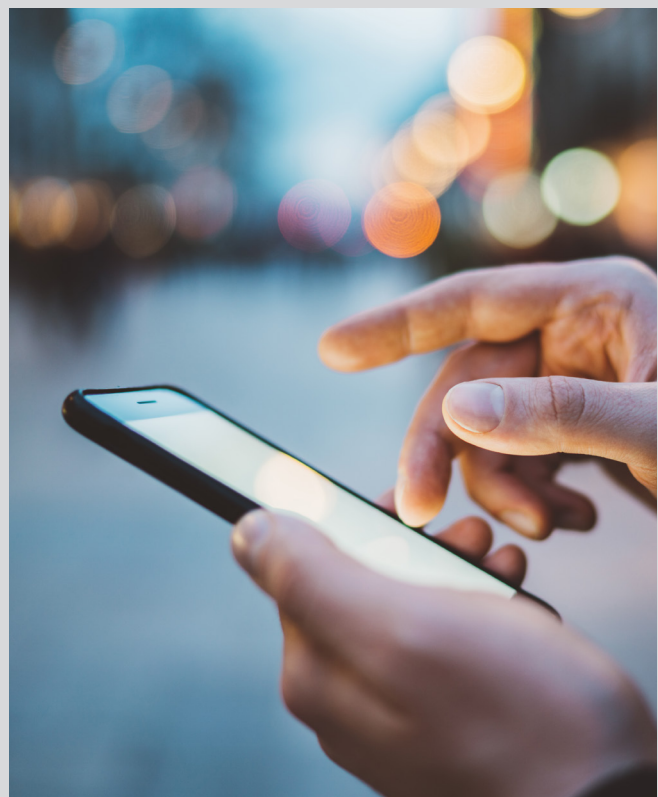
KIND has another program which provides clients with mobile phones to promote interactive dialogue and conversation with KIND. The program started in Central Valley, California and has expanded to four other states. KIND has provided 80 mobile phones to clients to use for the duration of their respective cases. These phones were acquired at a heavily discounted rate with a national service carrier. KIND also negotiated discounted service plans with the carrier to include unlimited data and domestic calling.

Once the phones were acquired, KIND’s Technology Strategies team put privacy protections in place: the phone requires a passcode, cannot be reset to factory settings, uses only Google Chrome, and has search result restrictions to make the phone child friendly. Once a case is closed or the child ceases to be a KIND client, the phone is returned to KIND to be distributed to another client.

Impact: Through both its virtual office technology and mobile phone distribution program, KIND has helped clients receive protections under immigration law, including asylum and Special Immigrant Juvenile Status (SIJS), a path

to legal relief for children in the US who have been abused, neglected, or abandoned by a parent. Teams in San Francisco and the Silicon Valley have worked with clients in Fresno and the Central Valley via Skype for Business; they have used the platform to finalize documents for SIJS petitions and to prepare for immigration court hearings. Pro bono lawyers have also communicated through Skype for Business with clients whose petitions were granted. Having the ability to tell the children about the good news through a video call, as opposed to a phone call, is a rewarding experience for all.

Key Lessons: One challenge that KIND faced when establishing the mobile phone program was balancing usability and security. Since their clients are all children, KIND knew it had to put certain safety and privacy restrictions into the phones. However, it did not want to have too many restrictions that would make the client reluctant or afraid to use the phone. KIND struck a happy medium by loosening some restrictions, such as removing branding on the phones so that the children could feel like they were using their own phone. For organizations hoping to implement a similar program, KIND recommends thinking about the essential restrictions needed and where some restrictions may be eased, in order to promote a user-friendly experience.



Available technologies for managing cases – subscription services

Just as the inability to conduct in-person meetings with clients can challenge an attorney-client relationship, it also makes it more difficult for organizations and individual lawyers to manage caseloads and client information. Fortunately, there are technologies and platforms available to help LSPs, small firms and nonprofits better deal with these challenges. This section summarizes several technologies that can be used to manage cases, to track tasks/progress/results, and to store digital information securely.

A. Cloud-based case management platforms

Below are several cloud-based legal platforms that allow LSPs, solo practitioners and small firms to efficiently manage caseloads, staff, schedules and finances. While each of these platforms has communication and data storage functions, they are not specifically designed to send or store large files. Platforms to address those needs are included in Section B below, on document management and transfer platforms.

Clio

(www.clio.com)

Description

Clio is a case management software platform that can be accessed in any country from any device with an internet connection. Clio currently operates globally, with users in Africa, Asia, Australia, Europe, and North America. Clio offers three subscription tiers:

- The Starter Package includes functionality for case and task management (including time tracking and billing) and provides access to a secure client portal.
- The Boutique Package includes enhanced third-party integration, advanced document automation, secure document editing and sharing, and customization options.
- The Elite Package additionally includes court calendaring rules, enhanced task management, and reporting functions, and 1-on-1 customer support and training.

According to www.getapp.com, Clio is compatible with

35 percent of the most popular mobile apps, including Quickbooks, Google Suite apps (including Gmail), Microsoft 365, Microsoft Outlook, DropBox, Box, and Zoom, although certain integrations may not be available for lower-tier subscriptions.

Cost

Free trial: Each package offered by Clio includes a seven-day free trial.

Starter Package: Clio's Starter Package costs US\$39 per user per month when billed annually or US\$49 per user per month when billed monthly.

Boutique Package: The Boutique Package costs US\$59 per user per month when billed annually or US\$69 per user per month when billed monthly.

Elite Package: The Elite Package costs US\$99 per user per month when billed annually or US\$109 per user per month when billed monthly.

MyCase

(www.mycase.com)

Description

MyCase is another globally operating cloud-based case management platform that allows users to access documents, contacts, calendars and emails securely, both through PCs and mobile (iOS and Android) devices. MyCase also has additional features that allow attorneys to communicate with their clients and co-workers, provides a secure portal for clients to access materials and sign documents, and includes a number of workflow tools. MyCase also integrates with many popular mobile apps, including Quickbooks, Google Suite apps (including Gmail), DropBox, and Microsoft Outlook.

Cost

MyCase monthly subscription costs start at US\$49 per user when billed annually or US\$59 per user when billed monthly. MyCase also offers a free trial period. MyCase does not offer nonprofit pricing or discounts, but it will not charge nonprofit organizations for sales tax.

Rocket Matter

(<https://www.rocketmatter.com/>)

Description

Rocket Matter is a cloud-based platform that allows attorneys to create matters, upload and merge documents, track time, create calendars, and create tasks. In addition to organizing user tasks, Rocket Matter also allows individual users to delegate tasks to, and prioritize tasks for, other users. This is especially helpful for attorneys managing teams that work remotely. It is available in any country.

Rocket Matter offers an Essentials Package and a Pro Package.

- The Essentials Package includes functionality for matter management, time and billing, online payments, conflict checks, document storage, contact management, and calendar management.
- The Pro Package allows for advanced customizations, more-sophisticated report generation, templates for matters and documents, document assembly, a client portal, and third-party app integration.

Rocket Matter also integrates with many popular mobile apps, including Quickbooks, Gmail, Google Calendars, Microsoft Outlook, DropBox and Box. Again, certain integrations may not be available for lower tier subscriptions.

Cost

Free trial/discounts: Rocket Matter offers a free trial. Organizations interested in long-term or multi-user contracts may also be eligible for discounts.

Essentials Package: Rocket Matter's Essentials Package begins at US\$25 per user per month.

Pro Package: The Pro Package starts at US\$65 per user per month.

Nonprofit discounts: Rocket Matter typically offers 50 to 75 percent off for nonprofit organizations. Contact the sales department at sales@rocketmatter.com to go over pricing and system requirements.

Practice Panther

(www.practicepanther.com/)

Description

Practice Panther is a cloud-based law practice management software currently operating in 172 countries. Its platform includes a client portal to securely communicate and send documents with encryption. Practice Panther offers three subscription tiers: a Solo Package, an Essential Package, and a Business Package.

- The Solo Package includes an internal chat feature, real-time notifications, a daily agenda email, document templates, task and event workflow tools, access to training videos, and basic support services.
- The Essential Package includes additional features, including customization tools, additional billing and timekeeping tools, additional accounting services, and email and calendar synchronization.
- The Business Package further includes SMS alerts, intake forms, calendar rules, enhanced accounting reports, live trainings, VIP support, and migration and integration services.

Practice Panther also integrates many popular mobile apps, including Quickbooks Online, Gmail, Google Calendars, Microsoft 365 (including Microsoft Outlook), MailChimp, DropBox and Box, although certain integrations may not be available for lower-tier subscriptions. For example, integration with email, DropBox, Box and MailChimp are not included with the Solo Package.

Cost

Free trial: Practice Panther offers a seven-day free trial.

Solo Package: Practice Panther's Solo Package costs US\$39 per user per month.

Essential Package: The Essential Package costs US\$59 per user per month

Business Package: The Business Package costs US\$79 per user per month

Nonprofit discounts: Practice Panther offers nonprofit pricing options. To discuss pricing, email info@practicepanther.com.

Filevine

(<https://www.filevine.com/>)

Description

Filevine is a software platform that focuses on team collaboration and workflow management. It stores all data in one place, and automatically files text messages and other communications from a client in that client's case file. It also allows attorneys to manage tasks, set deadlines, create customizable reports, generate document templates, and have documents e-signed.

Filevine is built on AWS, which is Amazon's cloud computing platform. It is compatible with most popular software platforms, including Quickbooks, Google Suite apps (including Google Drive, Google Calendars and Gmail), Microsoft 365 (including Outlook), Microsoft OneDrive, DropBox, and Box.

Cost

Filevine does not publish its pricing and does not advertise free trials but does offer software demonstrations free of cost. <https://www.filevine.com/demo-request/> LSPs interested in Filevine will need to contact the company for more detailed pricing information. <https://www.filevine.com/pricing/>

Casebox

(<https://casebox.org>)

Description

Casebox is a file management and collaboration software for human rights organizations. It operates internationally and is available in multiple languages, including Arabic, Bengali, Bahasa Indonesian, Burmese, Cambodian, English, French, Korean, Malayalam, Mandarin (Chinese), Nepalese, Russian, and Thai. Casebox allows users to manage documents and records easily with features such as document preview, editing in Microsoft Office, full-text search, multiple tab capabilities, undelete, document versions, and smart folders. Users can also add existing forms to Casebox and/or use the software's form builder to manage records. Casebox tracks all discussions and tasks related to a case or document, including calendars, comments, and document versions. Casebox boasts numerous data security features, including a regularly audited source code, two-factor authentication, open source transparency, and secure hosting.

Cost

Casebox was developed jointly by HURIDOCS and [KETSE.com](https://www.ketse.com).

HURIDOCS offers Casebox hosting, support, and training to human rights organizations. For pricing, LSPs can contact Casebox at casebox@huridocs.org.

B. Document management and transfer platforms

The following platforms are among the most widely used technology platforms specifically designed to store, manage and transfer large files.

Microsoft OneDrive

(<https://www.microsoft.com/en-us/microsoft-365/microsoft-teams>)

Description

OneDrive allows users to share files and folders via a link once they are synced to the OneDrive. It also operates and is available in over 100 countries/regions. However, unlike Google Drive (discussed below), OneDrive allows paying users (ie, those not using the free version) to set expiration dates and passwords for those links. In addition to being available through desktops and laptops that run on Microsoft operating systems, OneDrive is also available through mobile devices and macOS.

Cost

Microsoft OneDrive provides users with 5GB of cloud storage for free. Additional storage capacity can be purchased, starting at US\$2 per month for 100GB of storage space. For US\$7 per month, users also get access to Office 365, as well as 1TB of storage space in the cloud. Eligible nonprofits may get special discounts on Microsoft products such as OneDrive. For eligibility and more information, visit <https://nonprofit.microsoft.com/en-us/getting-started>.

ShareFile

(www.sharefile.com/)

Description

ShareFile is a cloud-based file sharing and storage solution hosted by Citrix and used in more than 100 countries. It includes virtual data room services, file syncing, and email capabilities, and allows users to securely store documents, track edits, create restrictions, digitally sign documents, and track workflow.

Cost

ShareFile offers four pricing tiers.

Individual: The Individual tier costs US\$16 per month and offers the following features: one employee account, 100GB of storage, and 10GB maximum file transfer size.

Team: The Team tier costs US\$60 per month and offers the following features: five employee accounts, 1TB of storage, and 10GB maximum file transfer size.

Business: The Business tier costs US\$100 per month and offers the following features: five employee account, unlimited storage, and 100GB maximum file transfer size.

Virtual Data Room: The Virtual Data Room tier costs US\$295 per month and offers the following features: unlimited accounts, 5GB of storage, and 5GB maximum file transfer size.

Google Drive

(www.google.com/drive)

Description

Google Drive, which operates in more than 150 countries/regions, allows users to share files or entire folders through unique links, which can be sent from the web or Google mobile apps. While Google Drive allows users to set permissions for files and folders, it does not allow users to set expiration dates or passwords for files and folders. Google Drive may be a good option for standalone file transfers where the materials being transferred do not require maximum security.

Cost

Google provides 15GB of cloud storage for free. Additional storage capacity can be purchased, starting at US\$2 per month for 100GB of storage space.

Through Google for Nonprofits, eligible organizations may receive discounts for Google Drive. For more information and to request a Google for Nonprofits account, visit <https://www.google.com/nonprofits/offerings/g-suite/>.



DropBox

(<https://www.dropbox.com/>)

Description

Dropbox is a file hosting software used in 180 countries. In addition to allowing users to share files, DropBox also keeps files and folders synced between devices and the cloud.

It supports document collaboration, and allows users to password-protect and otherwise set permissions and expiration dates for documents. Dropbox files can be shared from the web or a user's mobile phone, and can also be shared through its dedicated and simplified sharing tool Dropbox Transfer, which logs how often shared files have been downloaded. Document recipients do not need a Dropbox account to download materials sent via Dropbox.

Cost

Dropbox provides 2GB of cloud storage for free, with paid plans starting at US\$12 per month for 2TB of storage.

Discounts on Dropbox Business subscriptions are available for nonprofit organizations. Contact Dropbox directly at <https://www.dropbox.com/support> for more information.

Box

(www.box.com)

Description

Box is a global file hosting software that includes end-to-end encryption and integrates with most mobile apps, including Office 365 and Google. In addition to allowing files to be sent and stored, Box also includes workflow management features, including automation of repetitive workflow processes.

Box operates internationally and features Box Zones, which offer single- and multi-zone data storage to ensure compliance with global data residency requirements. Box Zones are available in the following countries: Canada (Montreal, Toronto), Germany (Frankfurt), United States (US Federal Zone), Singapore, Ireland (Dublin), Japan (Tokyo, Osaka), United Kingdom (London, Cardiff), and Australia (Sydney, Melbourne).

Cost

Box includes a free plan for individuals that offers 10GB of storage, and a 250MB file upload limit. Business plans range from US\$5 per user per month for 100GB of storage to US\$25 per user per month for unlimited storage. Nonprofits can apply for a donated account or discounted Box subscription at <https://www.box.org/use-box>.



Remote access to courts and government agencies

The response of national and local court systems and government agencies to the ongoing global pandemic has varied significantly by region, country and even within countries. The complex array of factors such as the severity of local outbreaks, evolving political and administrative responses and the availability of financial, technological and human resources has resulted in temporary closures, suspension of non-essential and/or in-person services, and greater reliance on existing and new technological tools and communication channels. In some places, courts and government agencies have resumed or are resuming normal operations. In other places, the crisis response is still underway.

The highly local, varied and rapidly changing nature of these responses presents a unique challenge for LSPs assisting clients and members of the public with navigating court procedures and administrative processes. These include providers representing litigants, those serving self-represented litigants, individuals seeking government benefits and immigration or asylum assistance, and those providing general information on court systems and government agencies. While this challenge is urgent in the short term, budgetary pressures associated with national and local pandemic responses may result in long-term limitations on in-person access to courts and government agencies. This could include a reduction in services, as well as a permanent shift to remote services for these institutions. Below are a number of best practices for LSPs to consider when adapting their communications, services and operations in response to changes in access to court systems and government agencies, both in the short and long term.

Best practices

- Stay informed about changes to the operation of courts and government entities. LSPs should keep up with changes to the operations of courts and/or government agencies within the geographic areas they serve and communicate these changes to staff, volunteers, and (as needed) clients. As discussed above, hours of operation may be shorter, services may be limited or suspended, and the adjudication of legal matters may be delayed.
- Monitor technology-driven changes to existing processes. LSPs must also remain alert for any technology-driven changes to existing court and agency processes. In the shift to more remote activities and services, many courts and agencies expanded the use of existing technologies or accelerated the adoption of new technologies. For example, some courts began conducting/permitting appearances and hearings via video conference. And with the pandemic impacting the ability of litigants to have legal documents notarized, some courts have approved alternative approaches such as remote notarizations (e-notarization and remote online notarization). Courts and government agencies may have implemented, or plan to implement, new systems for the electronic preparation and filing/submission of required documents and pleadings. These changes may or may not be publicized and the availability of technical education and support may vary. The staff and volunteers of LSPs must familiarize themselves with these technologies and processes to properly assist clients and members of the public engaging directly with courts and government agencies. LSPs should also be prepared to advocate on behalf of marginalized and vulnerable populations for whom these changes create access barriers. We anticipate that many of the technology-driven changes to court and agency processes may remain in place even after the pandemic has abated.

- Communicate operational changes and remote access issues in a simple, straightforward manner. Administrative orders and guidance issued by courts and government agencies often include legal, procedural or technical language that make it difficult for self-represented litigants and members of the public to navigate. LSPs serving these groups should prepare user-friendly content communicating these developments, including updates or alerts, FAQs, self-help materials, step-by-step how-to guides, and video tutorials. These materials may need to be translated into different languages and made accessible to those who are vision or hearing impaired. This information can be made available through existing channels (eg, websites,

social media, listservs, etc.) and by leveraging many of the tools discussed in this Guide. Existing self-help materials and information published by an LSP may also require updates. LSPs should also evaluate whether changes are needed to internal materials/resources used to service clients.

- Publicize continued availability of services. In the face of court closures or suspension of in-person hearings, clients and potential clients may assume that legal aid is not currently available. LSPs should publicize and explain the scope of services currently being offered, and particularly their role in helping clients navigate remote access to courts.



Glossary

Accessibility Features: features designed to help people with disabilities use technology more easily

Application (App): a software program or group of programs designed for consumers

Audio conference: a telephone meeting conducted between multiple, separate callers

Bandwidth: the maximum amount of data transmitted over an internet connection in a given amount of time

Best practices: In this guide, we use “best practices” to refer to suggestions of good, effective practices. The suggestions are not meant to be exhaustive or to exclude consideration of other equally effective methodologies.

Closed captioning: the process of displaying the text version of spoken words on a television, video screen, or other visual display

Cloud-based: stored, managed, and processed on a network of remote servers hosted on the internet, rather than on local servers or personal computers

Cross-platform: able to be used on different types of technologies or with different software packages

Electronic signature (e-signature): any electronic process that indicates acceptance of an agreement or record

Encryption: the process of converting information or data into a code, especially to prevent unauthorized access

End-to-end encryption: scrambles messages in such a way that they can be deciphered only by the sender and the intended recipient. A message is encrypted on a sender’s device, sent to the recipient’s device in an unreadable format, then decoded for the recipient

File hosting service: an internet service specifically designed to host user files. It allows users to upload files that can be accessed over the internet after a username and password or other authentication is provided.

Nonprofit: a legal entity organized and operated for a collective, public or social benefit

Online platform: a digital service that facilitates interactions between two or more sets of users who interact through the service via the internet

Open source: software for which the original source code is made freely available and may be redistributed and modified

PDF: a file format that provides an electronic image of text or text and graphics that looks like a printed document and can be viewed, printed, and electronically transmitted

Screen sharing: the process of broadcasting the contents of one screen to another device or multiple devices

SIM: a smart card inside a mobile phone, carrying an identification number unique to the owner, storing personal data, and preventing operation if removed

Two-factor authentication: an electronic authentication method in which a computer user is granted access to a website or application only after successfully presenting two or more pieces of evidence of identification

Webinar: an interactive online seminar that anyone with an internet connection and the necessary software can view over the web

Wi-Fi Network: a wireless networking technology that allows computers and other devices to communicate over a wireless signal

TTY: a special device that lets people who are deaf, hard of hearing, or speech-impaired use the telephone to communicate, by allowing them to type text messages

Video conference: a visual communication session between two or more users regardless of their location, featuring audio and video content transmission in real time

Virus: a type of malicious code or program written to alter the way a computer operates and designed to spread from one computer to another

VoIP: short for Voice over Internet Protocol, converts your voice into a digital signal, allowing you to make a phone call directly from a computer

VPN: short for virtual private network, gives you online privacy and anonymity by creating a private network from a public internet connection

Additional resources

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- *Leveraging the SDGs for Inclusive Growth: Delivering Access to Justice for All*, Organisation for Economic Co-operation and Development (2016), <https://www.oecd.org/gov/delivering-access-to-justice-for-all.pdf>
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