# 1.1. Questions to Ask to Optimize Purposeful Collaboration

Below are several questions that an organization should answer when planning purposeful collaboration. The questions are listed together here and will provide further explanation below.

1. **What is the problem that the organization is trying to solve?**
2. **Are there ways that staff are collaborating already? What is working and what is not working?**
3. **Who will need to use the system? What is their level of technological proficiency?**
4. **Will implementing a collaboration project or tools require a lot of change on the part of the staff? Does the organization have the ability to support the staff in that change?**
5. **What are the cost constraints for the project or tool?**
6. **What are the security constraints for the project or tool?**
7. **What group is driving this change? Management, clients, board members, a funder?**
8. **What collaboration policies are already in place and what policies will need to be implemented?**

9. **What other organizations have faced similar problems or challenges and what solutions have they tried?**

## 1. What is the problem that the organization is trying to solve?

As discussed in LSNTAP's Project Management Toolkit and Data and Evaluation Toolkit, defining the problem that the organization is trying to solve is a critical first step in any collaborative endeavor. A clear, well-defined problem statement sets the direction and purpose of the collaboration, ensuring that all team members are working towards a common goal. Review the problem statement with all project stakeholders to ensure that everyone is on the same page about what must be accomplished.

The project team will likely need to revisit a problem statement throughout the project lifecycle, whether the project is choosing which collaboration software to implement, or the project requires the use of collaboration software.

**Consider This Scenario:**

*A legal aid firm's management tasks the technology team with creating an intranet. During a meeting to develop the intranet project, the technology team delves into a discussion about document management system (DMS) challenges.*

*Before beginning the project, it is important for the team to pinpoint the issue the firm is facing and clarify with management what problem they are trying to solve. Here, management wanted the intranet for internal information sharing and a firm calendar which is a very different problem than a document management system.*

*It is important to ensure that the proposed technology solution aligns with the specific needs and requirements of the firm or project.*

## 2. Are there ways that staff are collaborating already? What is working and what is not working?

Staff are likely already collaborating with one another using existing tools at their disposal. Before going further, organizations should carefully consider what tools staff are already using, how these tools are being used, and what is and is not working.

Surveying staff about collaboration needs is a simple and cost-effective way to gather information about existing collaboration practices. Organizations can task their technology committees with gathering information about what is working well and what could be done better to collaborate purposefully. The team should ask staff about pain points and knowledge gaps with current tools in order to better draft the problem statement.

The team should gather a list of the tools the staff are using, and how staff are using them. This discovery process enables organizations to identify patterns and trends in how different teams are collaborating.

**Questions to Consider**

1. What tools are staff using on a daily basis to collaborate?
2. What tools are staff using less frequently to collaborate?
3. Are staff using unsanctioned (by the organization) tools to collaborate? That is, are they using their own personal accounts (e.g., Dropbox, Google Workspace, etc.) to collaborate? Why?
4. What challenges do staff face while using tools to collaborate?
5. What features do staff find are most or least useful?
6. Is there redundancy in tool use? That is, are staff using more than one tool to do the same thing (e.g., Zoom and Teams for internal meetings)?
7. What non-digital tools are teams using to collaborate?
8. What problems do staff have collaborating?

9. How well do the collaboration tools integrate with each other and other required applications (e.g., how well does SharePoint integrate with the LegalServer [a case management system])?
10. Do staff feel like they have the capacity or desire to learn to use more tools if those tools will make them more efficient?
11. What support do staff feel like they would need to transition to different tools?

## 3. Who will need to use the system? What is their level of technological proficiency?

Successful collaboration hinges not only on the technology employed, but also on the willingness and ability of users to effectively use the systems. When thinking about who will be using the new system, consider the following:

1. Will people outside of the organization be using the tool? Consider whether clients, board members, or volunteers will be using the tool to collaborate. Outside users pose special problems because they will be accessing the tool from outside of the organization’s own secure network. For example, does the organization have a plan for IT support if a board member is unable to log in to the new board extranet site?
2. What is the users’ level of technological proficiency? A tool that works well for a technologically savvy staff member may not work well for those with limited technical abilities.
3. What is the user experience like when using the tool or collaboration strategy? Optimally, tools will be user-friendly and intuitive to reduce the learning curve and increase overall adoption.[6]
4. How accessible is the tool? Does the organization have team members who have special needs that must be accommodated? Users may require technology that provides features to accommodate different ways of accessing information, such as compatibility with a screen reader or high contrast for visibility.
5. How many staff will be using the tool? How scalable is the tool? Smaller groups may collaborate better using different tools than bigger groups. Further,

collaboration tools that require multiple licenses may be cost-prohibitive for the organization.

6. Will implementing a collaboration project or tools require a lot of change on the part of the staff? Does the organization have the ability to support the staff in that change?

When choosing a collaboration method or tool, organizations must always consider what kinds of IT support users will need and whether existing staff will be available to provide support and training. If a new tool requires significant training, an organization may decide to accomplish the same goals with a tool staff are already using.

For example, if an organization is already using Gmail for email and Google Drive for saving individual files, it may end up using Google Drive as a document management system to make adoption easier for staff, instead of introducing a completely new DMS.

**Questions to Consider**

1. Has the organization articulated the purpose and benefits of the new tool or process?
2. Does the organization have support of the Executive Director/CEO and upper management?
3. Beyond management, has the organization involved all of the key stakeholders in the decision-making process? How will the organization communicate updates, expectations, and new policies?
4. How will the organization pay for the cost of adoption (training, staff time, etc.) while staff are learning a new tool or process?
5. How will the organization roll out these new or changed systems? In phases? All at once?
6. How will the organization measure success?
7. How will the organization determine what changes need to be made in the future?
8. How will the organization address resistance to change?
9. What is the organization’s plan for continuous improvement?

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## 5. What are the cost constraints for the project or tool?

Legal aid providers face cost constraints and therefore decision-makers must take into account the cost of new tools or processes.

**Questions to Consider**

1. Will the organization have to purchase multiple licenses for the tool? Are there discounts for multiple licenses?
2. Are there lower-cost options available? While free tools often run the risk of violating a lawyer's duty to keep client information confidential[7], many platforms offer software at reduced rates to non-profits. The team also may not need all of the features of more expensive tools and may be able to continue with successful and intentional collaboration with bare-bones software.
3. Can the organization accomplish its goal with software it already has? What are the downsides of using software it already has?
4. Can the organization negotiate with the vendor? Most vendors will negotiate, especially when the organization plans to purchase multiple licenses or will contract for an extended period of time.
5. Can the organization use grant funding or donations? Organizations may be able to secure funding for planning for purposeful collaboration and/or new collaboration tools via grants or donations. Organizations should check with board members to see whether anyone is willing or able to donate to the use of collaboration tools.
6. How many tools does the organization need? Duplicative and inefficient use of tools costs the firm money. Consider that it may be more cost effective to pay more for a single tool while removing duplicative or inefficient tools, even if it would require some staff to learn a new system or change their

processes.

7. What is the cost to maintain the software long-term? Most collaboration software is cloud-based requiring monthly subscriptions; be mindful that the price may increase and that many vendors require contracts, particularly if negotiating a non-profit discount.
8. What is the cost to train the users? Keep in mind that users likely will need regular training and support in order to continue to use the tools efficiently. Depending on the type of user (internal staff, external board members, clients, etc.), the organization likely will have to have different types of training and support available.

## 6. What are the security constraints for the project or tool?

Every law firm must act diligently to protect the sensitive and confidential information it collects from clients and staff. Before choosing a new tool, consider the security implications of how the tool will be used.

**Questions to Consider**

1. How will confidential and sensitive information be protected by the software vendor? Management must read the Terms of Service, End User Agreement, and/or Privacy Statement for any software being purchased or used by the firm.
2. How does the tool encrypt user data, both while being transmitted and while being stored? How is data protected from interception?
3. What access controls are available and are user permissions sufficient to protect the firm’s data and allow for the right level of access for appropriate staff? Ensure that funding and trained staff are available to maintain and administer those access permissions. The more complex the permissions schema, the higher the administrative costs of the system.
4. Does the tool allow for multi-factor authentication (MFA) and/or single sign on (SSO)? Tools that do not offer these standard security features should

not be considered.

5. Are audit logs and activity monitoring available to track use and potential misuse of the tool? If available, review the format and accessibility of those logs to determine whether specific technical capacity or support are needed in order to make use of those features.
6. How can staff and outside users securely share data, documents, and other files while using the tool? How will the organization support external users, who will be accessing the tool outside of the firm’s system, in the use of the tools?
7. Where is the data stored? Be wary of companies that store data outside of the United States, as most other countries have different data protections.[8]

## 7. What group is driving this change? Management, staff, clients, board members, a funder?

Addressing collaboration challenges requires a nuanced approach that adapts to the specific group responsible for the need. For example, management and staff have different internal communication needs than the external communication needs of clients, board members, and funders.

Consider the different needs of management and staff. While both share the goal of bolstering effectiveness and efficiency through collaboration tools, management’s impetus often stems from the need to improve oversight over an organization’s communications and work product. Introducing policies and procedures to enhance managerial oversight might inadvertently burden staff with added requirements that seem less efficient or beneficial to them. Navigating these different needs calls for adept change management— the organization must clearly clarify the rationale behind the changes, acknowledging the shift in established workflows, and emphasize the collective advantages inherent in an organization with improved oversight.

Within the organizational context, it is imperative to recognize that certain policies and procedures, instituted with the intent of enhancing managerial oversight, may inadvertently impose additional requirements or changes on staff which may not be embraced due to perceived inefficiencies or a lack of perceived utility. Therefore, a change management approach becomes imperative, necessitating effective communication regarding the rationale behind these changes. Acknowledging that such changes may disrupt established routines or potentially render certain tasks less convenient, it is essential to convey the collective advantages gained by the organization through heightened oversight and enhanced managerial capabilities.

## 8. What collaboration policies are already in place and what policies need to be put into place?

A large part of planning for purposeful collaboration is policy training and reminding users about how the tools the organization provdes are supposed to be used. Staff need very clear guidance regarding which tool should be used for what type of collaboration, especially if the organization has tools with duplicative functions. For example, both SharePoint and OneDrive are used to store documents, but staff may not understand the differences between the two. The firm should enact clear policies around where different types of files should be stored and make sure that staff are regularly reminded of the policies and why the policies exist.

It is crucial to underscore that the mere presence of software does not inherently signify the existence of a corresponding use policy. Firms are tasked with the responsibility of not only formulating these policies in written form but also ensuring adherence by their staff. These policies should be in place regardless of whether the firm has adopted tools for their designated collaboration functions.

While deploying collaboration tools can certainly facilitate policy compliance and streamline administrative tasks, the introduction of collaboration software without well-defined policies often results in staff confusion and duplication of effort. In essence, having clear policies and a proper change management plan are the linchpins to effective software implementation, mitigating confusion, and promoting efficiency.

**Examples of Policies to Implement**

- Document management, retention, and destruction policies
- Communications policies (internal and external)
- Case handling policies and procedures
- Scheduling and calendaring policies
- Operations policies (for example, how to reserve the one office Zoom account)
- Acceptable use policies

## 9. What other organizations have faced similar problems or challenges and what solutions have they tried?

Organizations with similar missions and staff sizes likely have similar collaboration problems. The LSNTAP listserv is an excellent resource to use to reach out to other organizations to collaborate about the art of purposeful collaboration.

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6. Bear in mind that making things user-friendly may increase the overall cost. Configuring software for easy and intuitive use will take more time and work to define customizations and configurations.

7. Model Rule of Professional Conduct 1.6

8. Although regions, like the European Union, have much better protection than the United States. See the GDPR at https://gdpr-info.eu/.

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