Quinten Steenhuis:

Hello everybody. Welcome to session 1B. In this room, we're going to be talking about exploring the intersection of AI legal systems and collaborative solutions. Really excited to be your moderator. I'm Quinten Steenhuis from Suffolk University Law School. With me today is Dane Henry, who's the advocacy training and technology attorney at Legal Aid of West Virginia; Ashley Lowe, who's the executive director of Lakeshore Legal Aid in Michigan; Scheree Gilchrist, who's the chief innovation officer at Legal Aid of North Carolina; and Robert Adelardi, who's the chief information officer of the 11th Judicial Circuit of Florida. We're going to have two CLE codes that are going to come up on the screen and I'll read aloud later on in the session. For more information about all the speakers, I'm just going to refer you to the bios that are on the online agenda.

And we're going to start off today's panel by hearing from each of the panelists in turn. They're going to take about five minutes to talk to you about their work without any slides. They're doing it the old-fashioned way. And then we're going to have a really robust discussion after that where we're going to dig a little bit deeper into some of the ways that each of them have been able to collaborate and use AI to further their work. I believe that we're going to go in the order that I read the speakers' names, correct me if that's wrong, but Dane, I think you're going to start us off.

Dane Henry:

All right, sure. Thank you, Quinten. So as Quinten mentioned, I'm Dane Henry from Legal Aid of West Virginia. Currently, ironically enough, we actually do not have any active development AI projects. Most of what we are doing is fully exploratory, and we're hoping that a lot of those are going to come to fruition. Our primary focus right now in terms of our technology projects has been in developing guided interviews and document automation systems, both internally and externally, for users who might or might not qualify for our services, but also for advocates within Legal Aid of West Virginia. And what we're really hoping for, in terms of integrating AI into those types of projects, is to address what we found in our testing, which is anytime we have a free text entry from users in any sort of paragraph format or anything like that, the quality of the answers tends to get a little bit degraded, particularly in comparison to what you might see from an attorney-drafted petition. And so, as a result, the courts don't look as highly upon those petitions because they're obviously put forth by a pro se person.

And so we've already seen a couple of proof-of-concept integrations with tools such as ChatGPT, where it will take the user's language that they're putting in and transform that into proper punctuation, proper capitalization, proper sentence structure, without adding new facts, without hallucinating scenarios that the user didn't enter. And so we're really hoping to do that. Within the last year, we launched what we call our Kinship Connector, and that is for [inaudible 00:03:14].

Quinten Steenhuis:

Dane, you've just muted yourself.

Dane Henry:

I just muted myself. I hit the space bar. So those are for kinship caregivers, aunts, uncles, grandparents, second- or third-generation parents to be able to file temporary care agreements, guardianships, or adoptions, without needing to interact with an attorney, through a guided interview process. And what we're really hoping the AI to be able to do is to help them to explain their story, explain why the children are in their care, why they are the best caregivers for those children. Similarly, we have a number of clinic applications that we're using: a name change, a will clinic, and an expungement clinic. And in both the name change and the expungement, there's a lot of free text entry about explaining why they need a name change or how they have rehabilitated themselves and avoided any further criminal convictions. And just as in the Kinship Connector, what we see is that the user entry is lacking. And so we're hoping to use the AI to help them to better tell their story, to better put forth their story to the courts.

We have also applied for a grant in conjunction with seven other legal services organizations from all across the country to try to use AI to pull in ... I mean, obviously an AI is based on a large language model. It's using information from everywhere. But we want to kind of corral that. We want to pull in information only from the legal information websites that each of our organizations have and make sure that the AI is hopefully creating a more robust answer, but based off of the information that we have put forth that has already been vetted, that has been written by an attorney, that we know is legally accurate, and to use that information to provide the answers to the users. We're hoping to hear back about that grant soon.

And then finally, we're looking to use it internally. We've moved all of our internal documents, all of our case management system, everything from just a regular plain file server up into the Azure cloud through either SharePoint or through OneDrive. And using AI to be able to create templates based off of all of the petitions that have been put forth by Legal Aid attorneys or even to take a first crack at a client letter based on the case notes that have been entered into our case management system, just so that we can get that first draft and hopefully ease the burden on our advocates a little bit. So while we don't have anything actively in development, there are a number of things coming down the pike that we know it's more of a matter of if, or I'm sorry, when and not if AI is going to be used because it is going to be coming forth for us.

Quinten Steenhuis:

Great. Thanks, Dane. And we're doing really well on time, so I might pop in some questions as we go, but let's go right to Ashley.

Ashley Lowe:

All right, thank you. So at Lakeshore, I'm at Lakeshore Legal Aid, we are a civil legal aid program that serves the Detroit metro region. And we have a hotline, a statewide hotline that provides advice and brief service and intake for the six LSC-funded, Legal Services Corporation-funded programs in the state. We're also part of a team of legal aid programs that is working in Detroit's Right to Counsel and Eviction Cases project. And so we have been thinking a lot about AI. Like Dane, we don't have anything in the works, or we don't have anything going right now, but we do have a lot of ideas that we are developing and getting close to launching. So thinking about how we can really use AI to transform our organization and really improve access to justice. So two of the big projects that we are thinking about, we have a Wiki, which is this vast repository of legal information, legal advice, resources, protocols, all to help our hotline staff give advice and refer and support people who are representing themselves, or who are doing intake for that we might be referring to our other legal aid programs.

We have over 115 civil legal topics in this Wiki, and it's used by our staff on our hotline, our litigation staff, and all our partner agencies. Unfortunately, it's not like a real Wiki like Wikipedia where people can go in and just update things as they know them. It has really weird programming based on this weird old platform that we use. And so only one or two people can edit it because they understand how to do the program, which is really overwhelming to them, and it means that they don't do it very often. And so it's not always up to date, and it is also hard to navigate. So I jump into it probably once a week. I can never find anything I want. The people who use it all the time, they're fine with it, but I really can't make it work for me. So it's just clunky.

So we have applied for a grant to reboot this whole system and move it to a new platform where we would use AI natural language augmentation to make it easier, more natural to ask questions, and have more reliable searches. So the idea behind it is let our staff find information more quickly, give better, more effective and accurate information and advice to our clients, shorten the calls that we are on when we're giving advice, and allow us to serve more people. In doing that, we are partnering with the other legal aid programs in the state, and we hope to enable them to make updates to the Wiki as they get that information, because so much of it is based on the information that they're coming in contact in their local areas. So that's one project.

And the other project relates to our right to counsel effort. So we did just get a grant—I have the contract in my hand finally—to provide informative materials to tenants facing evictions. And in that project we are going to create 45 videos in three different languages. Some of them are focused on reinforcing advice or other procedural information in the cases where we're providing representation, and some are more focused on people who just receive advice from us and not full representation in their case. So they might be a summary of their rights or an overview of the process or next

steps to help them represent themselves. And Lakeshore has done several projects where we've created videos that people love, but if we don't get them the right content at the right time, it is not very useful. So for this project, we are going to create the content. We're going to ask the court to share a QR code in the service packet that they give to tenants and on the Zoom screen when they go to their first hearing.

And that code will connect them to AI-assisted intake. So we can gather information, we can do triage—are these people we can help or not? We'll screen the clients, we will link them automatically to this video content that is curated for their specific needs, and then they'll go ahead and talk to a lawyer if they've been assigned a lawyer in our program. So the idea is to preserve as much attorney time as we can for representation, things that only attorneys can do, get in touch with clients sooner so we can improve their outcomes and avoid defaults, and to the extent we can, prevent evictions. And I just found out this morning that it looks like we'll be getting a grant to have a hotline that will support those efforts as well.

Quinten Steenhuis:

All right, Ashley, thank you for that. And I'm going to remind folks as we go to just go ahead and put questions in the chat. We have not shared a CLE code yet, but we will at two additional points according to the schedule that I have in front of me. But feel free to put those questions in the chat. I'm going to collect those. And once we've gotten a little bit to hear from all of the speakers, we'll go through some of those questions, as well as some of the questions that I have prepared in advance. So Scheree, you're the next person to tell us about your projects.

Scheree Gilchrist:

Thank you, Quinten. And as Quinten said earlier, I am Scheree Gilchrist, the chief innovation officer at Legal Aid of North Carolina. We are a statewide LSC-funded program. I'm also the director for Legal Aid Innovation Lab; this is a pioneering initiative in the legal aid community where we're hoping to foster an interdisciplinary approach to collaboratively develop and execute idea to streamline legal services delivery. So in terms of the projects that we're working on right now that involve AI, one of the first things that we did was to look at our website because it has a lot of dense information. It's really hard for people, even though we built it out to work at a fourth-grade level; it's really hard for our client base and people who are seeking information to navigate. So one of the things that we did is partner with LawDroid to create an AI chatbot that is basically a legal virtual assistant to help people seek and find information on our website and be able to summarize that information into useful bite sizes for them.

The other projects that we're working on are really centered around our intake and how we can integrate AI into our intake models and processes, and that's more of an

exploratory option right now. We haven't really fleshed that out, what that would look like. We've applied for some grants, but what I'm really excited to talk about is our work with VAILL, Vanderbilt Law School's AI lab, as well as our partnership that we have with the Duke Law Center on Law and Technology. Those, I think, have been very instrumental for us in developing not just the strategy for our lab, but also some of the thought process around how we can integrate AI. As it relates to VAILL, right now, we have students who are working with the innovation lab and they're taking a deep dive into our workflows and our work processes to help us identify opportunities for AI integration and also what some of those solutions could possibly look like.

And they're using their design thinking skills to help us test the virtual chatbot that I mentioned earlier as well. So that's been a really informative process. Just some of the ideas and things that they've already shared in terms of initial feedback has been really interesting to see. With the Duke Center on Law and Technology, we have a really deep partnership with them. They were actually instrumental in helping to shape the framework for our lab when we were launching. And along with North Carolina Central's Law Tech and Policy Center, they have been really helpful in terms of developing the scope and strategy and participating on our advisory board. But more specifically, the DCLT are helping us to develop AI best practices and policies and some of the data privacy policies that would go along with our AI integration. And so we're really excited about it, because we're really looking at how we can modernize access, not just in terms of intake, but just broader access to legal services and having their support and their expertise behind the work has been really helpful in terms of advancing what we're doing.

Quinten Steenhuis:

Okay. Thank you for that. And our next presenter is Robert Adelardi from the Judicial Circuit of Florida.

Robert Adelardi:

Thank you, Quinten. So yes, here in Miami-Dade County in Florida, we also, our first foray into AI was with a chatbot. We identified the need of helping our users, the people that visited the Family Self-Help Center, obtain information. Our website is, again, like Scheree was mentioning, very dense. The good and the bad thing about it is that our organization(the courts in Florida)and the Clerk of Courts are separate organizations. So we have islands of information that are not connected. If a user went to our website, they not necessarily would find the answers if it pertained to the Clerk of Court, if it had to do with the state attorney's office, if it had to do with the public defender's office; it's not connected. So we identified the need of helping our self-represented litigants obtaining information no matter where the information was stored.

So we started with this project. It was a grant from the State Justice Institute. We collaborated with the National Center for State Courts, and we wanted to be able to create a proof of concept and a proof of technology. We did both proof of concept and proof of technology on using a chatbot to bridge the gap and help, again, our self-represented litigants in the Family Self-Help Center. Our self-represented litigants account for approximately 80% of our cases in the Family Division, meaning at least one of the parties is a self-represented litigant. So you can imagine that there's a lot of need of providing information to our users, customers, if you want to call them that.

The AI-assisted chatbot--basically the way that it worked or the differentiating factor of this and other chatbots that are out there--is that it also includes speech-to-text and text-to-speech, both in English and Spanish. So a person can interact, let's say, using the keyboard or could speak to the chatbot, and the chatbot will reply, again, either in English or Spanish. One of the first things that we identified when we started looking at the type of interactions that people were having with the chatbot, particularly the questions that were being asked, was how we can tailor it a little bit and provide better answers and add other court divisions, because again, as it started with the Family Self-Help Center but there are people that have questions from probate. We have people that would look at the website and ask for other type of information.

So all of that was monitored closely. It was every day our project manager would be looking at what interactions were being performed with the chatbot, and that's how we were able to expand on it. The chatbot, again, the AI portion, was able to identify trends. So for example, even though we started talking in more legalese terms, it started learning that, for example, for our traffic, it would identify that people would interchange the term infraction and ticket, they would interchange when they were talking about domestic violence, they would talk about victim in the same terms as respondent. So that's how it started learning, and it's evolved based on the information that it's been gathering, based on the information that we've been also feeding and correcting. When it does probably or possibly provide an incorrect answer, there's a method for us to correct it.

So that was our first, that was probably a year and a half ago, about two years ago when we started with the grant and later the project with the National Center. Now what we're looking to do is we already are in collaboration with Microsoft. We're looking at uploading all of our administrative orders that are generated by the general counsel's office, uploading them in our own secure area, and having the AI engine prepare drafts of future administrative orders. So based on past administrative orders and the look, the feel, the content, the wording and so forth, we have at least a draft created that, of course, has to be vetted by legal counsels for conformity and for clarity, and at least minimize the time that it takes to draft these administrative orders.

Being a little bit more proactive on that, another future project that we're looking into is to see how we can use AI to draft opinions for our judges. Again, very carefully worded here that it has to be vetted by the actual attorneys, that work product, because we all know of the horrors of case law that doesn't exist of hallucinations and so forth. So in essence, those were what we've done in the past and some of the projects that we're looking for in the future.

Quinten Steenhuis:

Very interesting, especially hearing that a lot of those projects started before ChatGPT even came on the scene. We're about four minutes earlier than I was supposed to put up the CLE code, but this seems like a really natural break. Is there any problem with me doing that? I guess I'm looking for Ray or Kim to weigh in on that.

Kim:

That's fine. That's fine.

Quinten Steenhuis:

Okay. Why don't we put up the CLE code now? And I'm just going to read that out loud. It's one, B like Bob, S like Sam, J like Julia, U like umbrella, and that's 1BSJU. Okay. And we do have one additional CLE code that we're going to read later in this session. Now let's start with a bit more of a dialogue. So you've all had a little bit of time to share with your project. It sounds like in almost every case you're collaborating with someone, whether it's a vendor, whether it's with a court, with a corporation to help advance your projects. How critical is it that this interdisciplinary collaboration to help AI works succeed and to help them actually strengthen your work that you're doing and make it more efficient? And we can just, let's go in reverse order, I guess to start. So maybe starting with you, Robert.

Robert Adelardi:

Great. Thank you again, Quinten. So definitely, we cannot think about this in a vacuum. Like I was mentioning, we have other stakeholders that we reached out to. Let me start with the external stakeholders. Like I said, our main stakeholder, external stakeholder, Clerk of Courts. Once we started working on this project, we had to get them involved. There was, whenever a certain question was presented, if the answer, it was not only to point them to the Clerk of Court's website to where the answer could be obtained, but then take them to the next level and provide services on that end. So basically what we would do is we would partner with the Clerks and do a little bit of a handshake. Again, not only point the user in the right direction, but try to get them involved with their call center, with their support center to be able to finalize that request.

It's again, not only provide the information, but help them obtain a result, an end result. Internally, we worked very closely with our Family Self-Help Center because that was the origin of our chatbot project. So we worked extensively with the Family Self-Help Center. The first thing we did was let's identify which are these, for lack of a better word, transactions that were requested the most. The Family Self-Help Center is a self-funded organization within the courts that provides access or provides help by paralegals for self-represented litigants. That's where they can help them use our tools that we have that provide the fillable forms that can guide them through a questionnaire and produce the actual legal documents that are needed for filing. So we needed to work in coordination with the Family Self-Help Center in facilitating those services. One of the things that was interesting was that the Family Self-Help Center, which the CIO of our technology arm was supporting, they already had a chat engine that required people at the receiving end to be able to interact.

So the chat engine, of course, was open during business hours. The chat engine was dependent on someone being able to answer, a physical person being able to answer the chat engine. By doing this in an automated way, by using our chatbot, one of the things that we realized looking at the trends and the statistics of our website was we had approximately 25% of our users were contacting and using our website and receiving support at 12:00, 1:00, 2:00 in the morning. We identified that it's not when the court is open to conduct business, it's when the person that's at the other end of the computer needs answers, when they can actually sit down in front of a computer because that's their downtime. Maybe they're working at night and who knows?

So we saw this not only in this project, but in another project that we were working on with online dispute resolution, we saw that even though in the COVID world everything went virtual, it's that the ODR platform continued to be a success because of being able to provide services at non-traditional hours and workdays. So in essence, collaborating with these organizations and internally with the different units in the court was what made these projects a success.

Quinten Steenhuis:

That's really fascinating. And just to highlight that number, you said 20% of the calls came in after midnight. That's amazing. I can echo that on a project I worked on an eviction defense guided interview. Where we turned on online intakes, the first one came in at 12:30 AM. So that's clearly there's a need for these people who are thinking about their problems late at night, needing some way to actually solve them right then and there. Maybe it lets them get back to sleep. Scheree, any of that resonate with you? Thinking about collaboration, obviously your collaboration with the VAILL, Vanderbilt Law School, with Duke, you're working with many different partners. Tell us a little bit about how that fits into your vision of the work.

Scheree Gilchrist:

Yeah, absolutely. I mean, it does resonate with us. We set up the innovation lab with one of the stated goals being collaboration and working with others in the tech and academia and other fields. And I think for a legal aid program, that sort of interdisciplinary collaboration is vital as we build and develop AI projects, because we get the chance to leverage expertise, our legal expertise along with the tech and academia expertise so that we ensure that the AI solutions that we build are not only technologically sound, but they're also ethically responsible and they're tailored to our specific client needs. And so from my perspective, collaboration, it just allows us to enhance our understanding of what the tech capabilities are and some of the other issues that I might not be thinking of as an attorney in this space that others with deeper expertise in that field will bring to bear. And it allows us to improve the design and implementation of these AI tools, and I think it ultimately makes our work more impactful and efficient.

Quinten Steenhuis:

Ashley or Dane, any thoughts? We'll start with Ashley.

Ashley Lowe:

Yeah, so I think we have always, as a legal aid program, collaborated with other organizations, with other legal aid programs, social service agencies, the courts--sometimes better than others. We've been working with the courts. But the fun thing about this, the evolution of using AI and using technology and the collaborations is really for us that we've been collaborating with private enterprise. And so we have one partnership with Ford Motor Company where their AI team is advising ours to talk about how we can improve our processes internally using AI and our eviction work. We were funded, the Right to Counsel project was funded, in part by the Gilbert Family Foundation, which is the charitable arm of Quicken when I thought, "We have so much data to collect and it's slowing down our process," and the judges are mad at us because we're taking too long on the dockets and we don't know what to do.

And we're there with our paper and just slugging away at things. And so I'm talking to our funder, who's really, really supportive, and she said, "I think we do this better, and let's just talk to the folks at Quicken." So we bring them into a call and I'm talking and I'm saying, "This is what our problem is." They say "Okay, we could fix that today." And I said, "Well, I'm afraid that people will feel like they can't get through, because it's too much technology, and people would be afraid or a little hesitant." And they said, "Oh, we'll just do it with chat. No problem." It just was not a big deal in a way that things are a big deal for legal aid programs where we feel like we're asset restrained and usually innovation restrained. So that has been really eye-opening and freeing.

Quinten Steenhuis:

What about you, Dane?

Dane Henry:

Yeah, so the asset restrained, I mean, Legal Aid of West Virginia, despite being a statewide organization, West Virginia is not that big. When I attend other conferences, I hear about some of these other legal services organizations where they have data teams, they have dedicated people in all these specific technology roles. I write my own grants. I maintain all my own compliance for the grants. I do all the coding. I'm kind of a jack-of-all-trades, master of none. And so by utilizing collaboration with these other, either the other organizations that have these specialized teams, or as other people have mentioned, these private entities, where that is what they do, I'm able to leverage that expertise with very limited resources that Legal Aid of West Virginia has. So it's essential for what we do.

Quinten Steenhuis:

One of the questions that came in the chat, Dane, I think is really perfect for you and for our next topic, which was about funding. And you touched on that already, funding and resources. Can you tell us a little bit more about the grant that you were talking about and exactly what that would look like? And maybe you saw that in the chat as well.

Dane Henry:

Yeah, so I mean, the specific grant, my previous grants and the one that I applied for, it's a technology innovations grant from LSC, and that has primarily been where we at Legal Aid of West Virginia get our technology funding. I'm honestly not aware of any other specific ones. If anybody knows them, pass them my way. That way I can apply for more. But in answering the specific question that Liz posted with regards to what that grant would look like, the purpose behind it was we wanted to set the framework, the gate, the parameters of the AI to be our legal information from the specific legal services websites. And then we are envisioning it being a virtual legal assistant, perhaps if we have forms available. Some states have their forms up on their legal information websites, some don't. Ours within West Virginia, they're all published by the Supreme Court, so we don't tend to republish what the Supreme Court has already published.

So we see it as kind of more of the virtual legal assistant in not how to complete the forms, but I need a divorce. What do I do now? Or where do I start? That sort of information. And that's kind of what this grant is envisioning. Instead of just a general AI that's going to pull it from anywhere, we want it to have those very specific parameters of the legal information available from the Legal Aid of West Virginia website and go

from there, or one of the other seven organizations. And we're working in partnership with the Stanford Design Lab to figure out how all that would work.

Quinten Steenhuis:

And that definitely seems to be a common theme among the panelists. That idea of being able to retrieve information and then run that through whatever chatbot technology you're using is one of the themes I keep hearing. Sticking with the funding topic, anyone else have some thoughts about that? How do you go about finding funding? What are some of the constraints that you have with these AI projects? Are they tougher, easier than the other kinds of technology projects you've encountered before to get funding for? Cost more, cost less? And just jump right in if you have thoughts on this topic. Any of the panelists. We'll start with Ashley. See you've unmuted.

Ashley Lowe:

Yeah. Yeah. So I think they are, in a way, easier and a lot less expensive than I imagined that these projects would be. So we found funders who would never have funded us, are not really all that interested in funding legal services, and they don't want to fund lawyers' salaries on an ongoing basis, but they love an idea of an innovative concept. And so if we can kind of front load the costs of developing these technologies and the systems, then we've been able to speak to private foundations. I feel like there's a lot of foundations who are interested in funding technology. That's translated into other pro bono work as well. And just that idea of pitching the project as a way to transform what we're doing has been really effective for us.

Scheree Gilchrist:

And I would say we've had the same experience that Ashley just described. The lab has opened up doors that we never had before in terms of funding opportunities and interest in the work that we're doing. And just as Ashley said, people who may not necessarily have been interested in legal aid, poverty law type work, they're interested in the idea of scaling services and creating strategic plans for how you deliver services and the tech aspect of it. And so they're really... I think that's been an opportunity that we've seen. There still, though, in my mind, remains a challenge because when it comes to funding in general, there's not a... And I heard it in one of the sessions earlier, I think Quinten, you were on that rapid talk one, and one of the things that you all touched on was, or one of the questions that came up was this idea that are we creating a gap?

Because a lot of the funding from large technology companies go into bigger law firms and creating tools that really benefit them. And where does that leave legal aid programs and some other agencies that don't have deep pockets? And so for me, I think that's still a barrier. And I also think you can't be innovative with grants, because then

you have to follow what the grant tells you very specifically, and you can't really do a lot of the iterative work and some of the experimentation that you might want to do when your only source of funding is through a grant. And so I think there needs to be more that's done and more resources that are poured into legal aid programs so that we can really tap into really explore the opportunities that exist.

Quinten Steenhuis:

Or maybe even different kinds of grants that give you a little freedom to change your deliver goals along the way.

Scheree Gilchrist:

Exactly.

Quinten Steenhuis:

Yeah. Robert, anything resonate with you there?

Robert Adelardi:

No, definitely. We were lucky that we partnered with the State Justice Institute. They gave us a lot of leeway. The National Center actually helped us by leveraging work that they already had performed with the judiciary in New Mexico, and that's where we based our original proposal from, it's let's look at where New Mexico left off. Let's add to that. They did see a value in taking previous work and building upon it, and that's where I think speaking with the people from the State Justice Institute, they did see value in what we were proposing. And at the end of the day, it was a win-win for both the National Center, because they can showcase work that they've been doing and leverage work that they've been doing with other jurisdictions and moving it forward. And I'd say Justice Institute as a continuation of the funding.

Quinten Steenhuis:

Just out of curiosity, your project started before ChatGPT came out. Did you pivot to using generative AI as the project continued?

Robert Adelardi:

No.

Quinten Steenhuis:

Okay.

Robert Adelardi:

Like I mentioned earlier, we did a proof of concept and a proof of technology. Because we leveraged the original work of New Mexico, we used the same vendor that they were using, a private company that specializes initially in kiosked environments and later went onto the website and integrating an AI bot in the website and so forth. Yes, we don't determine what tools and what technology. We were more result oriented. So we said, "This is what we want, how you get here, you deal with that." That was more on the vendor side. But yeah, definitely it's not a... It was earlier implementations of AI that were not necessarily tied to ChatGPT.

Quinten Steenhuis:

So one kind of maybe surprising thing that I've been hearing is that maybe these tools are cheaper than the old kind of technologies in surprising ways. Another thing that I assume is a persistent theme for everybody is wondering, will this interest, the special interest that people are having in generative AI last? Will that keep that spigot of funding going in a year? Any comments on that from anybody on the panel? We'll start with that topic of how long we can expect people to stay interested in funding these projects.

Dane Henry:

I mean, for me personally, I do kind of fear we're in a little bit of a bubble of AI. Everybody, both in legal services and in the private sector, everyone is gung-ho for AI. And I do think it's going to pop at some point. And I mean, you hear about all the venture capitalists, the angel funding, everything else that's all going on in Silicon Valley. Everything is being dumped into AI because it's being seen as the next latest and greatest. And that's not to say that it won't persist at least for a while, but I mean, at some point I do think it's going to have to at least plateau, if not completely start to dissipate.

Quinten Steenhuis:

And can these projects fold into operating budgets? Are they at that low enough of a cost point that after you get that seed funding you can keep them going?

Robert Adelardi:

I can talk to that, because it exactly is our case. The initial funding helped us with all the legwork, with all the original engagement with the National Center. Right now, the reality is right now what we have is a recurring cost of hosting the AI portion of the tool. So it has become an operational cost, it's been absorbed by operations. But what I'm going to mention now is, and this is something I continuously repeat, this was

something that was born out of the IT organization. We identified a need, we identified existing tools, but this cannot be seen as an IT project, because eventually it becomes an operations project.

We have one person that... literally the tool is called Sandy because it was given an acronym in our website. If you visit our website, you can interact with the tool. It's right there front and center. So there's a team member of mine that was the project manager that literally babysits that tool and looks at, now it's like once a week, that looks at the interactions with the people, looks at the type of questions, adds additional content by pointing additional topics or adding additional topics. But it's because it's more of an investment of what we've done, we don't want to see it fail. But eventually we have to have a handoff to the operations team, because again, this is to serve an operational need. It's not to showcase technology. If you continue to use these projects just to say, "Look at what technology can do," and there's no value added and no one's going to take ownership, eventually you're going to get bored. You're going to migrate to the next best thing, and this is going to die.

Quinten Steenhuis:

Scheree, I can tell you have something you want to say about that.

Scheree Gilchrist:

Yeah, no, no.

Robert Adelardi:

She's jumping there. She's jumping.

Scheree Gilchrist:

Yeah, because what Robert is saying really hits home for me, because the thing is we're not integrating AI for the sake of AI. To me, AI is just another tool. It is the latest tool that's available to improve the way we deliver services and create some efficiency in our work. But we're being very intentional about ensuring that it solves an actual problem that we have so that it can then be incorporated as part of our general operations. And so what you were saying, Robert, is exactly right, I think. And what you were saying, Dane, if it does plateau, then yes, for us it will be sustainable because it will be part of what we do. And that's because we're, like I said, being very intentional about our approach. And it's not just AI for the sake of AI or whatever new technology comes on for the sake of that technology. It's really looking at what are the challenges that our clients are facing and then what are the tools that are available. Right now we're talking about AI tools, but we also look at non-technology solutions as well.

Quinten Steenhuis:

Ashley, do you have a comment on that?

Ashley Lowe:

Yeah, I absolutely agree. I think there's this moment in time that we all have to capitalize on because people are interested in funding these initiatives, and we'd be fools not to figure out a way to improve our systems, but right, not for the sake of using AI. How do we make things better? How do we solve that justice gap that everybody talks about? This is one of those ways to do it, and I think there'll be another thing after that, and I hope everybody's as excited as about that as they are about AI, so we can keep moving forward with our process. But the look that we are taking is what Scheree is talking about is we want to improve our business systems, what are the ways that we can do that? And are there places in there for AI?

Quinten Steenhuis:

Something obviously a little bit unique about this moment that we're in right now is that everyone at once is trying to discover just what is it that AI can do that is helpful? And I'm hearing that from half of the panel. You're just at that first stage of finding the right project to build. And for the other half, you already are trying it a bit. And Scheree, your job actually is innovation officer. Tell us how do you balance that exploration mode to proving that the tool works, and how do you evaluate that as well as you're going along?

Scheree Gilchrist:

Yeah, it's been an interesting balance, because my job itself is to create a strategic plan and vision for innovation and then to manage whatever that change management process looks like within our organization. And so doing that and then trying to develop use cases for products and all of that is challenging. One of the things we recently did was we hired a project manager specifically for the lab and to work on the development of projects so that they can move forward without me being an obstacle as I'm doing bigger picture work internally and changing culture and all these things that really take time and an investment in communicating with our staff and understanding how does this all impact the overall work and mission of our organization. So having the project manager on board who can focus on the specifics of a project and moving that project forward and then exploring some of the other opportunities for partnerships that exist as we're mapping out what the next steps are has been very helpful.

Quinten Steenhuis:

Anyone else have thought about that? This kind of funny moment where we are really looking for solutions that use this technology. How do you think about that balance? Obviously we've come up with some, but how do you think about that as our job right now?

Dane Henry:

I mean, for me, a lot of the balance comes in in what I feel people are willing to accept. There are so many people, not just at Legal Aid of West Virginia, but also our users out in the general public that they don't know what AI is for. They're already nervous enough about technological changes to begin with. I have to hear from a particular person at our office about how she's been practicing this particular way for the last 30 years and does not want to deviate from that whatsoever. And so there's that hesitancy of change and then just with the general unknown about AI on top of all of the other technological changes. So you really have to balance like, okay, we want to use this tool, but is it, as other people have mentioned, is this actually going to benefit the process? Or are we just saying, let's use AI just to use AI? And so I think that's the biggest piece of calculus for me, is how can I do it without really terrifying people into being too scared to use the tool.

Quinten Steenhuis:

And I think Scheree, that's the change management piece you were talking about, right?

Scheree Gilchrist:

Yeah, and Dane hit on the education piece. It's that educating our staff and others around AI and what it's for, how it can be used, how it can benefit them, and also creating digital literacy within our client base, because if we're building tools and solutions but they don't know how to use it, then we're not really solving a problem. So there has to be an education and training piece tied to the work that we do.

Quinten Steenhuis:

Ashley, you have very concrete and specific projects you're looking to get funded, but obviously no one's done most of these things before. How do you decide this is a project we're going to try, and do you see it as a demonstration, a proof that your job is to say this can be done, or how do you conceive it?

Ashley Lowe:

We have a team, we have an innovation committee that is made up of IT people and just people who are kind of tech-forward and interested in trying things out. And when we

started thinking about AI, we went to this group and said, "What are the things? What are the things that are really the barriers that you've been trying to figure out solutions for that we are really frustrated by and where we think AI and other technologies might be a solution?" And so some of the, like the Wiki was really a pain question. It is such a painful thing. I hate it so much that I said, "Let's try. We got to try something." So some of it just the things that we just could never get to. Dane was talking about the templates, being able to use all our information and create templates out of them. So I feel like... As he was saying that when we were talking earlier, I thought, "I don't have to build a brief bank."

And I bet a lot of us on this call have said, have on their to-do list, "Develop a brief bank that everybody can get to." I've had it for 10 years, and we've never been able to make it anything that is really viable. So it's those kinds of things that just we haven't been able to solve with non-tech work. So that's kind of our thinking, and thinking about ways that we think people will adopt it. So like our Wiki project, we have people, the people who will use it the most are our staff, and so we can train them, we can engage them in the process of building it, and so we can kind of bring them along whether they really want to or not. I think our model in the court is a little more of a stretch, because it's the public. And will the public feel comfortable with it, or are they still not quite there yet with talking to a chatbot? And so I think it'll have a bigger impact, but I'm not sure if it will have a bigger impact today or a little bit further down the road.

Quinten Steenhuis:

I'm going to skate over into an area where we haven't... I didn't send any prepared questions your way, but it's making me think about this. So we're hearing, yeah, this sounds like a really great way to do this, right? What's our pain point? What are ways that we can imagine that there's a solution from what we already can see the tools can do? Has anyone been trying before funding, before we're getting into building out a project, what are some of the ways that you experiment and validate it before you get to that stage? Are people opening up ChatGPT and just trying it out on a couple documents? I'm curious to know what, if any, of these approaches people are using now to pre-validate these ideas. Dane, looks like you unmuted. I'll let you go first.

Dane Henry:

I mean, as much as I like to be the innovator, honestly, that's where the collaboration comes in in working with other legal services organizations, people like yourself, where you came and showed me a proof of concept of what can be done within Doc Assembly and other technologies. And then using that as the proof of concept to then go to my organization and to hopefully our funders and say, "Look, we know this can work. And while it might not be widespread, it still is innovative, it still is new particularly for us, so let's look at it that way." So I tend to not be the first, particularly we're Legal Aid of West

Virginia. Again, we're a small state. We don't have a lot of resources, so I do rely heavily on other people within the field to do that innovation for me and then see where we can expand it or specifically tailor it to the needs of our state.

Quinten Steenhuis:

So in other words, we can be on the leading edge but not the bleeding edge, right?

Dane Henry:

Yes.

Quinten Steenhuis:

Even though we've only all had a year with this technology, there are enough things out there that we can follow as examples. That's great. Other thoughts? Anyone else want to add on to Dane's thoughts there?

Robert Adelardi:

I'd like to add to that. So when we had already finished our project, gone into production with our chatbot, before I, or the way I engaged for our proof of concept that we're working on now in collaboration with Microsoft about drafting administrative orders using generative AI, what I did was simply I went into ChatGPT, I put in the prompt that I wanted a draft of an administrative order. I said specifically what I wanted for the 11th judicial circuit of Florida. And the result was so good that our general counsel said, "I'm interested in this. This would definitely be a game-changer for us if we can cut time, cut..." Which at the end of the time means if you can't hire enough staff because of whatever reasons, being able to use tools that automate or at least alleviate the initial portion, she was all for it. And that's how we got a buy-in on working on this project. It was literally as simple and as cheap as going into ChatGPT and putting in the correct prompt.

Quinten Steenhuis:

Okay. Well, you heard it here folks, if you haven't yet tried opening up ChatGPT and trying your next big idea, you should. Sounds like there really is a lot you can do by just doing that. I'm just going to remind folks, we do have the chat open if people want to add some questions. We have about 20 more minutes for this session, and then we're going to go back into the plenary after I believe a short break. So please put your questions there. You're going to go back to the first Zoom link for the plenary, which starts at 4:40, I see from my notes. So I think now let's turn to the impact phase of this. How do we know when these tools that we're developing, the things that we're building,

how do we know if these projects are going to work? How do we measure and look back and say they did work?

Robert Adelardi:

If I can? Well, one of the successful outcomes of this, if you remember, I mentioned that our Family Self-Help Center had their own chat engine, but it was a managed chat engine that someone had to be on the receiving end and answering questions. We saw the daily usage of that option plummet, because people no longer were drawn to need a person at the other end, an actual human being, or like I call them, a warm body answering questions. They were content enough with the information that was being provided by our chatbot.

Quinten Steenhuis:

That's exciting. And I'm assuming that you saw the numbers overall were the same or higher or what was the transition?

Robert Adelardi:

We started getting... Of course, you have to weed out those that are just chatting with the bot to test it and to try with people that actually use it. And that's how we can actually, by the interactions that are saved, and there is a disclaimer that we save that information. You see when it's no longer a, let me just play around with this, and you're actually seeing people asking valid questions and receiving, of course, they're valid answers.

But this all works to help you reinforce the fact that this tool is working. I am increasing the number of interactions per day, and I'm decreasing the number of calls, people calling the Family Self-Help Center or people having to use the chat engine, to the point where now we're about to just rip it out of the offering because it's more of a cost and we don't see any benefit to having that technology in our website. So definitely you see the increase in traffic, you can do Google Analytics or whatever and see how different areas are being impacted, and it definitely has been a positive experience for our users and actually for our staff.

Quinten Steenhuis:

Scheree, what about you? What do you do about measurement of impact?

Scheree Gilchrist:

Well, going back to what I said about being very intentional, one of the things that I've been tasked with doing, once we've identified a project that we're moving forward with, so it's gotten all the necessary approvals, is creating, and this is actually taking a page

from the business industry or corporate industry, is creating a project proposal or a project charter that includes KPIs, key performance metrics. And so what are we really hoping that this thing will do? And then how do we track that? And if it's an intake project, as I mentioned, we're looking at, its metrics such as the resolution time between the time we got on the call with the person to the time that we got that case opened. And then how quickly are we assigning cases, client or staff satisfaction rates, dependent on where the AI interface is, and then overall number of clients being served or number of clients not being served.

Or some of the disparities that we're trying to address in the rural areas, are we hitting our targets where that's concerned? So that's been something that's been a little bit of a learning curve, is really creating these project proposals and thinking about what are the KPIs that we want to have. But I think it's been very informative because it really helps us to stay focused and really helps us to ensure that, again, we're not just implementing something for the sake of, it's a new shiny object that we're all captivated by, that it really is something that's going to improve the service delivery or improve the efficiency in our work.

Quinten Steenhuis:

Yeah, that sounds critical to have those key performance indicators before you even get started with the project Ashley, yeah.

Ashley Lowe:

Yeah. I think some of the things we've been looking at are what are those things? Are they increased people that we can represent, reducing evictions, reducing judgments that are entered? So really kind of hard numbers that we are measuring. We also are looking at some more qualitative things as well. So doing client surveys is part of our measurement to see how do people engage with it? Do they feel good about it? Do they feel supported? Do they feel yucky? So that we're asking those questions. And the same for staff. That is built into our grant for the Wiki, is our staff feeling better? Do they feel less burnt out and less frustrated by the processes when we're using this technology?

Quinten Steenhuis:

We got a great question from the chat, which is how do we actually supervise the quality of the answers over time? Maybe people feel good about them but they're inaccurate. Any kind of monitoring that folks are doing there or planning?

Scheree Gilchrist:

Is this a question related to the chatbots that we're building?

Quinten Steenhuis:

It does seem like it would be most relevant to the chatbot answer, but yeah, maybe overall monitoring quality, looking for how things change over time and making sure they're still good.

Scheree Gilchrist:

Yeah, we have somebody who's assigned to do that. I mean, it's somebody wearing a different hat right now, but that's part what you said, Dane, you wear... In legal aid, we wear multiple hats. So we do have somebody that's monitoring and ensuring that the information is up to date, but it is a closed system, so it's only using information that we're feeding it and that we're giving it, so that information should be accurate because it's what we're providing to the developer to train the chatbot on.

Quinten Steenhuis:

Here's a really geeky technical question. Are folks doing, are you pinning, are you saying, "Hey, we're only going to use this model that was released on this date," or are you letting it change over time as the AI vendors upgrade and change their models?

Scheree Gilchrist:

Right now, we're letting it up change over time. So we're interested in seeing where the technology goes. We don't want to create something where we can't grow with it, so we're really letting it develop.

Quinten Steenhuis:

Did that raise any... Yeah, so for Ashley and Dane, your projects aren't live yet, but Dane, any thoughts that you've been having about key performance indicators, other ways to assess in advance this is going to be a good project or a bad project and then monitor it as the project goes on?

Dane Henry:

I mean, nothing really in addition to what others have said. I think Scheree really hit it on that have to plan, you have to bake it into the project. And as Ashley mentioned, it's actually written into the grant. We're working on a non-AI grant, but it's in any technology grant that you're working with, you need to know what are these performance indicators that you're going to be needing to assess. And some are the quantitative, am I doing more of what I wanted to do? And then there's the qualitative of is it easier to do what I was doing before, even if I'm not doing more of it? Or does it just make me feel better when I'm doing it? And it's kind of hard when you're dealing with client interactions, because hopefully we're not getting a lot of repeat clients that

come back for the exact same issue and need the exact same form filled out twice or whatever else.

So you can't really necessarily do an apples to apples comparison of the same client, but at the same time, you do need to understand ahead of time what you're going to be asking and whether or not the tool that you're developing is actually going to meet that need and effectuate that change. And in terms of what AI model, I mean, I think you almost can't pigeonhole yourself into one particular model as the AI is developed. I mean, it's developing for a reason. Not to say that every new iteration is an improvement, but they're developing new models for a reason. And so if a better model comes out, you need to probably be open to the possibility of changing, even if it means some additional development work, some additional retraining of the model, if it's going to give you a better product in the end.

Quinten Steenhuis:

And I'll just say, as someone who's been programming with these tools, sometimes you don't have a choice because they don't last longer than a year before they say, "Too bad. Sorry. You can't use that model anymore. You got to go to the next one." Okay, well, let's take a minute now to show the CLE code for the second half of this session. This is the second CLE code, and it's one, B like boy, I assume that's an I like Idaho, F like Frank, J like Julie, that's 1BIFJ. So that was the second CLE code. And we have about 10 minutes left to keep going in. And looking ahead at the future of AI, you all have either a project or some grant applications in that are fixed at to what you thought the state-of-the-art was at some point in the past. What do you all see looking ahead at the future for where AI could take us, even if it's not ready to write into a grant or to start building with today? And we can hear from folks in any order, but if anyone wants to jump in first. Robert?

Robert Adelardi:

Yeah, thank you. Well, there's a lot of hype, of course, around AI, and when I look at the market right now, it seems that every single product, even a soft drink is being built with AI. They keep on using that magical two-letter term just to say, "Look at us, we're hip." So definitely everyone has to be careful of what specifically, when I meet vendors, and especially with vendors I haven't worked with before, they start throwing those terms out there. I say, "Okay, explain to me how you are incorporating AI. Why is AI being used for this and why is..." And that's where the conversation gets interesting.

I haven't seen so much buzz around the term since the term cloud came out when everything was cloud and everyone will know we're in the cloud. And the cloud is nothing more than someone else managing your infrastructure, period. So I think it is going to taper off, and it will reach its point where you use AI for what it makes sense

and the rest is just hype. And we're probably, I'd say, months, probably a year away from that point where people will realize, yes, there's AI and there's use of AI, and then it's going to be the next best thing and the next buzzword.

Quinten Steenhuis:

Dane, you also touched on that. I'm sure Scheree and Ashley, you've been thinking about that hype cycle. So yeah, there's some bad actor vendors who maybe are going to stop being able to just use it as a buzzword. Is there still some cool potential that we're going to see that we're not seeing yet, do you predict, if you opened up your crystal ball?

Robert Adelardi:

I think especially when you're talking about large quantities of data, when you're talking about huge repositories, definitely the large language model around AI and being able to read, consume, interpret, and create based around that, definitely I think that's where I see the most future around AI.

Quinten Steenhuis:

All right. And I could see Scheree and Ashley, you also wanted to weigh in. Let's start with Scheree.

Scheree Gilchrist:

I think I was going to just talk about what we would like to see.

Quinten Steenhuis:

Yeah.

Scheree Gilchrist:

I feel, I don't know, I'm not probably the best equipped to talk about where AI will eventually go. It's changing too fast. I don't know what it will look like a month from now, a year from now, and what the use cases might be in the next versions. I know that for us at Legal Aid, we would like to be able to get to a point, going back to that whole funding and resource issue, where we're using it for predictive analytics, for legal outcomes and things like that. That's ultimately where we can start to really talk about ways in which it improves our service delivery model. I think there's huge potential there for it to help us identify patterns and trends and for legal aid programs to kind of take the lead on what are the true needs, do a true needs assessment and take the lead on that in our states.

Right now, I know ours is done by... It's a collaborative effort by others, but we're the ones that have the clients coming to us. We're the ones that have all the data and the information, but we haven't yet been able to figure out how to use it in that way. So I think there's a lot of potential there for that. And that excites me in terms of using AI and some of the data models to really determine how we allocate resources, how we... Like I said, some of the predictive stuff is really interesting to me.

Quinten Steenhuis:

Ashley.

Ashley Lowe:

Yeah, those are what I was thinking too, finding ways to look at census data and other more recent things in census data to tell us where our clients are and are we connecting with them in a meaningful way and understanding our work so we can make quicker responsive changes to how we are helping clients. So I think, for me, I think it is how we use that information and can absorb it easily. So I just spent last weekend with my 80-year-old parents and my brother who's 60, and they're talking into their phones on ChatGPT the whole time. So I feel like if those people who are not necessarily tech-forward are really comfortable at that level, great things are going to happen because people are going to be comfortable and we're going to be able to get past, "Oh, I don't want to touch my laptop," and really just embrace it because it's so useful.

Quinten Steenhuis:

And Ashley, you mean literally talking to it out loud? That's what you mean, right?

Ashley Lowe:

Yes. Literally talking to it. Yes. Yes, because the screen's too small for the 80-year-old guy to be reading it, so he's just talking and it's given us answers back about basketball, which is what we were asking it about.

Quinten Steenhuis:

And at the other end of the spectrum, I can say that my 12-year-old son is also a big fan of doing the same thing, just exploring, talking to the chatbot, getting answers from it. Yeah, Dane.

Dane Henry:

I mean, I don't know necessarily that I have anything that somebody else hasn't already mentioned. I know one of the difficulties in being able to implement even a data-driven predictive analysis or anything like that is the availability of the data and just whether or

not that data is there. In our state at least the Supreme Court publishes very little data on what actions are being filed and things like that. So even if we had the tools available, it's difficult for us to be able to utilize those tools to get the information that we would want out of that. So I think that's where bringing it all back to the collaboration and trying to encourage other organizations to put forth that data so that we can utilize it to create predictive analytics or to pull and tease that information out.

Quinten Steenhuis:

Well, let's see. I just have a couple of reminders for folks, so we're going to end in about three minutes. I was digging around for it. I was told I should put a link to the next session, which is the plenary session, in the chat. Maybe one of the hosts can add that to the chat, so I'll be telling the truth when I say that it's there.

Kim:

I don't think we do that, because people are using their own individual. You're going back to the link you joined the plenary with.

Quinten Steenhuis:

Everyone has their own link.

Kim:

Because everybody has their own link, so they can't all go in as Quinten.

Quinten Steenhuis:

Okay. Well, I'm glad I didn't share that link in that case. The other reminder I want to let people know is that the CLE application information is in the online agenda. You're also going to get it by email, and there's going to be a post-conference survey by email. I know that they're going to really appreciate your feedback on how we did in this breakout session as well as in the conference overall. Since we have two minutes, here's another curveball for folks. Anyone have a question they wish I had asked another panelist? Anyone want to be the moderator and ask a question of someone else on this panel? It's a stumper, it turns out maybe. But Dane, I can see you're starting to think about it. Oh, maybe Ashley, actually. You unmuted.

Ashley Lowe:

Yeah, so I am fascinated, Scheree, with the brain trust that you're working with at Duke and Vanderbilt and thinking about how much is there, and I think where's the smarty kids who are going to help us to figure this out? Do you feel overwhelmed by that

amount of thinking and academia, or is it really practical and you're able to absorb it into your work?

Scheree Gilchrist:

It's been really practical, and I think it's because of who we're working with. I'm working with Cat Moon at Vanderbilt. She's one of the co-directors for VAILL, and she's very much in tune with access to justice issues. It's a passion of hers, so I think that that makes it easier to have a conversation with her. The same with Jeff Ward at Duke. He's also of the like mind, very much invested in access to justice and the issues around it, and so that's been really interesting to have that kind of conversation with them, with people who are already deeply passionate about these issues and really, truly care about creating solutions around those issues. No, I mean, yes, in terms of some of the other advisory board members that we've brought on, when they get into the really technical tech speak, that sometimes I have to say, "Okay, take a minute and explain that to me as if I were six years old or something." But no, working with our partners right now has been actually pretty easy.

Quinten Steenhuis:

Any question you wish that you could ask, Scheree, of someone else on the panel?

Scheree Gilchrist:

I think I'm going to probably follow up with Ashley afterwards, because I'm interested in the work that she's doing and the partnerships that she has outside of the academia, and so I think I'll follow up afterwards, but I don't have a specific question right now.

Quinten Steenhuis:

Okay. All right. I know that we hit 4:30. I want to honor that time. We're going to be back in the plenary. Again, use your individual link, you can't join as me, it turns out, to be at 4:40. Thanks everyone for a really great panel. Really enjoyed getting to talk with all of you today.