

Interest on Lawyer Account Fund of the State of New York

Funding civil legal assistance for low-income New Yorkers since 1984

Justice Infrastructure Project Planned Activities for Phase 2 (September 2024 – March 2025)

The activities planned for Phase 2 of the Justice Infrastructure Project (“JIP”) will include:

1. Vision presentation and feedback;
2. Stakeholder engagement;
3. Advisory Committee development;
4. Vision refinement; and
5. Initial development of Statewide Functions.

1. Vision Presentation and Feedback (September - October 2024)

The preliminary observations and vision of the JIP will be made, initially, at the NYSBA Partnership Conference (September 25-26, 2024 in Albany, New York). At these presentations, IOLA will seek feedback from participants at the Partnership Conference regarding its preliminary observations and vision for the project. A recording of the presentation at the Partnership Conference will be available on IOLA’s website with an open invitation for further comment.

To further advance an inclusive process of continued dialogue and feedback, IOLA will host virtual feedback sessions, inviting its grantees, community-based organizations and all other stakeholders that participated in any of the JIP listening sessions, in-person or virtually.

During Phase 2 IOLA will continue to seek feedback from New York residents that have been involved in the civil justice system. IOLA will be intentional about seeking opportunities for residents to participate in the design and development elements of Phase 2 and will seek feedback from residents regarding relevant elements of Phase 2 (and later phases). As in Phase 1, Residents who provide feedback or participate in design and development will be offered compensation for their time and contribution.

2. Stakeholder Engagement (October - November 2024)

IOLA will seek feedback from targeted stakeholders regarding elements of the design of the vision for the project. This will include engagement with stakeholders that have completed projects with materially similar elements – such as coordinated intake, online scheduling, capacity-based referral, statewide call center operations, lawyer referral, public-facing generative AI, coordinated knowledge management, coordinated outreach, etc.

IOLA will also seek to engage with significant government funders (e.g., OCA, OTDA, ILS, etc.) to discuss potential data integrations, process integrations, or other shared objectives.

3. Advisory Committee Development (October 2024 – March 2025)

IOLA seeks continued involvement from stakeholders to inform the design and development of elements of the vision IOLA has developed through advisory committees. IOLA has identified a preliminary list of areas where experience and expertise from grantees, community-based organizations and other stakeholders may be particularly helpful. IOLA expects that these needs

will evolve over time as the project develops, with new areas for involvement added.

Advisory committees will function for defined time periods based on the design and development needs of the project. For each advisory committee, the scope will be defined, including the purpose of the committee, the expected time period for participation, the expected number of hours (per week) expected for active participation, and a description of the expected activities and deliverables (if any) of the committee. Members of each advisory committee will be compensated for their involvement, based on the specific needs of each advisory committee.

- **Preliminary List of Expected Advisory Committees**
 - Statewide Support Functions (Outreach Materials, Training, Knowledge Management)
 - Data Strategies (Security, Privacy, Resiliency, Standards, Definitions)
 - User Interface (User Accounts, Language Access, Scheduling, Live Chat, AI)
 - External Inputs (Capacity-Based Referral, Data Integrations)
 - Function Integration (Call Center Operations, Mobile App)

During Phase 2, IOLA will identify and solicit participants for the expected Advisory Committees. As needed, IOLA will also develop guidance and materials to Advisory Committees when they are launched (expected in Phase 3).

4. Vision Refinement (November – December 2024)

Based on feedback from participants at the NYSBA Partnership Conference, virtual feedback sessions, survey responses, Advisory Committees and continued stakeholder engagement, IOLA will further revise and refine the JIP vision. IOLA plans to present the refined JIP vision to the IOLA Board at its December 2024 Board Meeting.

5. Initial Development of Statewide Functions (December 2024 – March 2025)

Based on feedback of listening session participants, residents, continued stakeholder engagement, and the input of the Advisory Committees, and subject to the direction of the IOLA Board, IOLA will engage non-profit and/or for-profit vendor(s) that can assist with the initial development of the refined vision. If necessary, IOLA will gather information about the proposed design elements or other key elements via New York State procurement tools. IOLA expects that its initial activities in Phase 2 will pertain to the development of Function A, the statewide support function (see accompanying *Preliminary Description of Project Vision*).

While elements of the statewide support function are being developed, IOLA may also seek vendors to assist with the preliminary phases of Function B, the statewide information and referral function, which may include a detailed assessment of the technical capabilities of certain existing platforms, such as 2-1-1, LawHelpNY, FindHelp, CareSuite, etc. Such assessments will identify integration opportunities as well as where additional investment would expand current functionality to achieve the vision of the JIP, which may lead to additional vendor engagement based on the identified needs.