Community Legal Centres Queensland

Building digital capacity for the Queensland CLC sector

Digital Strategy Paper

January 2020

AUDAX AT FIDELIS

Queensland
Government

Acknowledgment of traditional owners

Community Legal Centres Queensland affirms that the Aboriginal and Torres Strait Islander peoples are the Indigenous inhabitants of Australia and acknowledges their unique relationship with their ancestral country. In particular we acknowledge the Turrbal and Jagera peoples, the traditional custodians of the land in and around Brisbane and pay respect to their elders, past and present.

Contents

Thank you

This strategy paper is a wonderful example of sector collaboration and Community Legal Centres Queensland (CLCQ) would like to acknowledge and thank the following Community Legal Centres for their time and participation:

▸ Aboriginal & Torres Strait Islander Women's Legal Services North Queensland
▸ Basic Rights Queensland
▸ Bayside Community Legal Service
▸ Brisbane North Community Legal Service
▸ Cairns Community Legal Centre
▸ Caxton Legal Centre
▸ Central Queensland Community Legal Centre
▸ Environmental Defenders Office (Qld)
▸ Gold Coast Community Legal Centre & Advice Bureau
▸ Hub Community Legal
▸ LawRight
▸ Mackay Regional Community Legal Centre
▸ Moreton Bay Regional Community Legal Service
▸ My Community Legal
▸ North Queensland Women's Legal Service
▸ Pine Rivers Community Legal Service
▸ Prisoners' Legal Service
▸ Queensland Advocacy Incorporated
▸ Queensland Indigenous Family Violence Legal Service
▸ Refugee and Immigration Legal Service (RAILS)
▸ Suncoast Community Legal Service
▸ TASC National Ltd
▸ Taylor Street Community Legal Service
▸ Tenants Queensland Inc
▸ Townsville Community Legal Service
▸ Women's Legal Service

In addition, CLCQ would also like to thank the following organisations for their kind support and input towards this work:

▸ Community Legal Centres Australia (CLCA)
▸ Community Legal Centres New South Wales
▸ Community Legal Centres Association (WA)
▸ Federation of Community Legal Centres (VIC)
▸ Department of Justice and Attorney-General Queensland (DJAG)

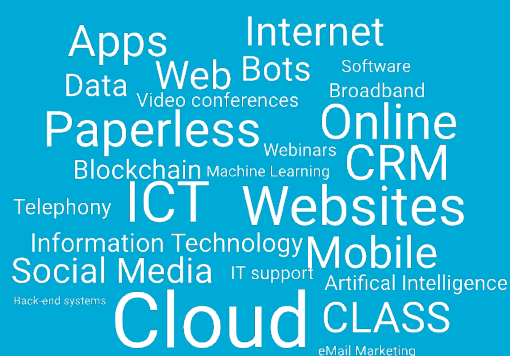# Who this paper is for

This strategy paper has been developed for:

▸ the Queensland community legal centres (CLCs) to assist the sector in building its digital capacity;

▸ for funders to assist them in reviewing CLCs' funding applications for digital technology and innovation projects.

CLCs are invited to refer to this paper to:

▸ find out about the current state of technology adoption across the sector and the systems typically in use across CLCs;

▸ learn about the technology challenges experienced by CLCs and the opportunities to create efficiencies and deliver greater services to their clients;

▸ refer to the sector-wide approach to digital adoption, and adapt guidelines and resources to their own digital capacity building program.

In the spirit of collaboration, these resources are also being made freely available to other CLCs and CLC peak body organisations outside of Queensland.

The scope of digital

Apps Internet Software Broadband Data Web Bots Video conferences Paperless Online Blockchain Machine Learning Webinars CRM Telephony ICT Websites Information Technology Mobile Social Media IT support Artifical Intelligence Back-end systems Cloud CLASS eMail Marketing

The term "digital" is often used in different contexts and can be interpreted either as:

▸ specific: digital = online/mobile tools only (websites, social media, mobile apps), or any channel or tool allowing digital access by clients or consumers to an organisation's products or services;

▸ or all-encompassing: digital = anything that is technology-related.

In the context of this Digital Strategy project, this paper and associated resources, the term "digital" is interchangeable with "technology", and refers to the broad spectrum of **information technology** (IT or ICT) tools, systems, applications and channels.

"*The Digital Strategy will help ensure future investment in digital capability and infrastructure is targeted and meets the needs of CLCs and their communities.*"

- Rosslyn Monro, Director, Community Legal Centres Queensland.

Executive summary

Effective use of technology is becoming increasingly critical to the CLC sector's sustainability and ability to facilitate access to justice for vulnerable and disadvantaged people. The CLC sector has traditionally been lagging in terms of technology adoption, with limited focus, expertise, and effort dedicated to digital capacity building. In order to address the digital gap and the imperative to "get technology right", CLCQ has undertaken the development of a sector-wide digital strategy.

Consultation was conducted with Queensland CLCs as well as broader stakeholder groups involved in the sector during 2018 and 2019. Stage 1 of this project lead to the development of the _Digital Strategy Foundations Report_ in December 2018, self-funded by CLCQ. In 2019, the Department of Justice and Attorney-General funded Stage 2 of the project, which has resulted in the development of this _Digital Strategy Paper_. Participation in this work has been strong and positive, with input received from 26 out 34 CLCs in Queensland, and a good cross-representation of centres in terms of size, services, and locations. Engagement was carried out through a combination of surveys, questionnaires, interviews, online calls, and face-to-face workshops.

The review of the current state of digital adoption in the sector illustrates the diversity of CLCs in terms of systems used, levels of technology uptake and maturity, whilst at the same time highlighting common challenges and needs. The sector recognises the importance of greater digital literacy, process automation, systems usage and strong data management practices, and the need to invest into technology programs as part of long-term overall capacity building.

Across the wider legal sector, technology is fundamentally altering access to justice and delivery of legal services, and the rapidly increasing growth of LegalTech providers creates both challenges and opportunities for CLCs. Hence, it is vital for CLCs to improve their current usage of technology, strengthen their core operations, give room to technology innovation and become digital-ready. Whilst new technology carries inherent risks, the risk of doing nothing is a tangible threat to the sector and its ability to continue delivering on its critical mission.

The strategic approach for the Queensland CLC sector is focused on enabling each CLC to build digital capacity using common resources, sharing knowledge, and collaborating within and outside the sector, whilst retaining their autonomy and ability to address specific local needs and priorities. The approach recognises the diversity of the sector and seeks to provide CLCs with the means to develop their digital capacity in a way that is flexible and adaptable to each CLC.

The digital strategy focuses on 5 key strategic areas of digital capacity building:

- **Govern**: enable CLCs to make informed decisions about technology, and plan and manage technology change and risks.
- **Fund**: enable funding of technology/digital initiatives above and beyond the baseline.
- **Adopt**: implement digital solutions that address business priorities and are fit for purpose for the sector.
- **Support**: upskill and support CLCs and their teams in using technology and grow with them.
- **Innovate**: foster an innovation mindset and help the sector to prepare for successes and failures.

To support the execution of this strategy, a roadmap of activities has been developed together with an initial set of practical resources for CLCs.

"Keeping up to date with technology is a complex process and often requires both a cultural shift within an organisation and a large investment of time. A collaborative approach will accelerate our transformation with technology and increase productivity, allowing us to focus on providing the best possible service to our clients."

- Sib Redfern, Corporate Services Manager, TASC National Ltd.

"Our centre agrees that the need for a digital strategy for CLCs is very valid and we have already commenced plans to investigate and incorporate many of the projects identified with the strategy. Collaboration on this across the sector will advantage all CLCs in Queensland."

- Kris Fleming, Operations Manager, Youth Advocacy Centre.

"The Digital Strategy is fundamental for the wider CLC network and will enable partnerships and improvements that impact the majority of our sector."

- Margaret Kassman-Raiwong, IT Services and Data Management Coordinator, Caxton Legal Centre.

The state of digital capacity in the Queensland CLC sector

Technology landscape

The Queensland CLC sector is characterised by a wide range of tools and technologies, and consultation with CLCs on the current state of technology highlighted that systems are often lacking, not fit-for-purpose, not integrated and/or not used to their potential. Overall, the sector still relies heavily on paper-based and manual processes with a limited uptake of digital automation, and whilst the level of technology usage and literacy varies from centre to centre, overall there is relatively low level of technology maturity.

The types of tools and systems in use in the sector can be categorised in the following core functional areas:

⤷ Community engagement	🗄 Client Services	✉ Operations
▸ The tools and systems that support engagement with external stakeholders (general public, sector contacts, members, supporters, media, etc.), communications and ongoing relationship management. ▸ This includes websites, social media channels, mass email communications, CRM (Customer/Constituent Relationship Management) systems, advocacy tools.	▸ The tools and systems that support the implementation, delivery and management of legal services, as well as the evaluation and impact measurement of those services. ▸ This includes CLASS (Community Legal Assistance Services System), case management systems, practice management systems, and online / mobile client services.	▸ The tools that support the daily running of centers' operations, support backend and internal processes and enable internal capacity building. ▸ This includes finance and HR systems, internal communications, productivity, and knowledge and collaboration tools (e.g. document management, online collaboration, etc.).

The technology solutions landscape shown overleaf illustrates the solutions typically found in the sector. The picture does not attempt to represent every single digital tool or software in use, but rather provide an overview of the most commonly used systems across CLCs. Typically, CLCs will use a combination of some of the systems shown on the diagram. Depending on their size and existing capacity, the suite of systems in place in a smaller CLC may be restricted to a minimal set of mission-critical systems (e.g. basic website, CLASS, MS Office, finance system). Larger CLCs with greater capacity tend to have more complex suites of applications and tools.

Fig 1. Illustrative technology applications landscape in the Queensland CLC sector
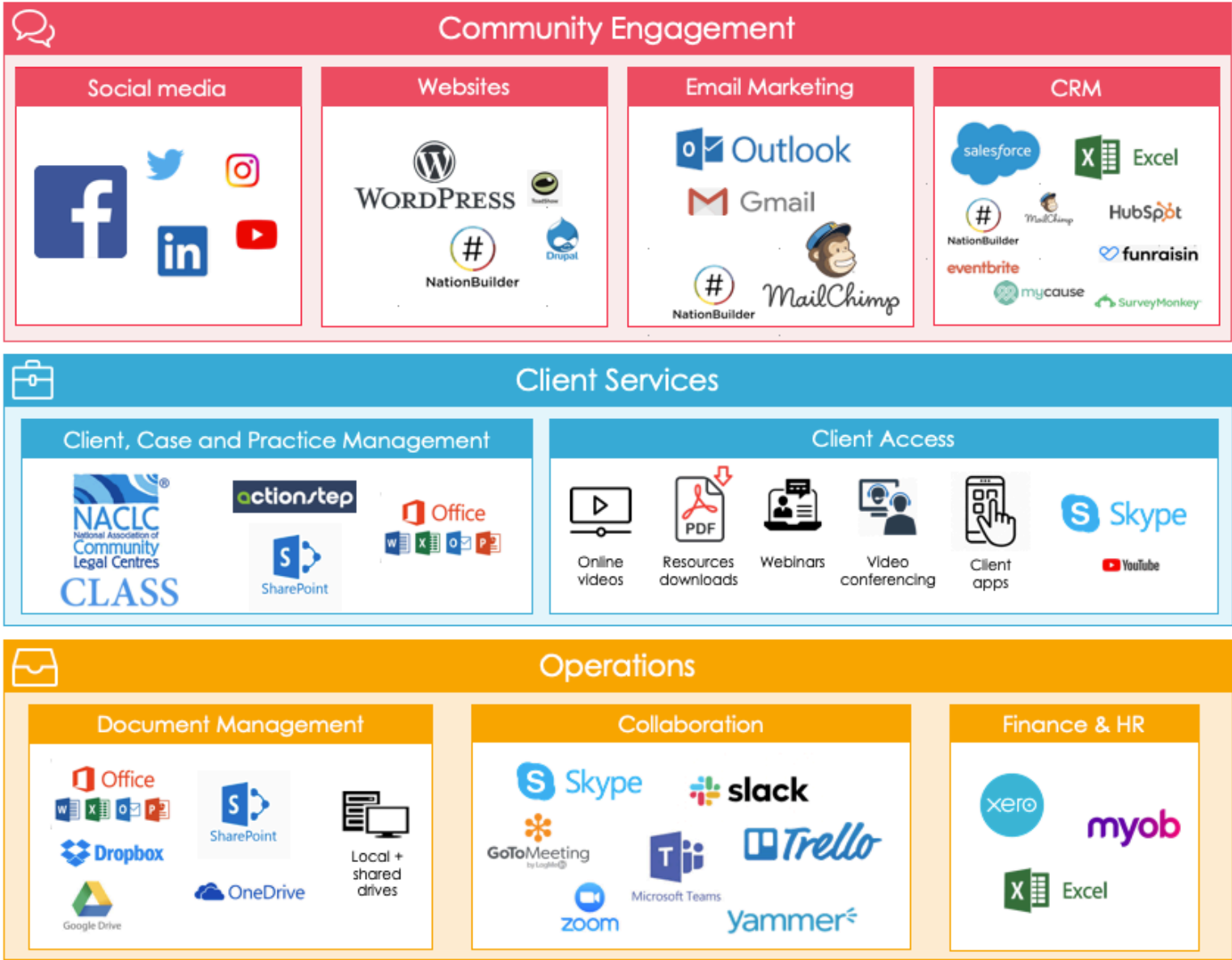
Whilst all centres use Facebook for **social media** engagement (either planned or ad hoc), other channels remain untapped due to lack of resources, time and skills.

Most centres are moving to the **cloud**, but there are still concerns about data privacy and risks.

Clients' digital **access** to services and information is essential and currently provided mostly via one-way online resources (downloads and videos).

Almost 2/3 of centres don't have any specialist skills or dedicated resources for **community engagement activities**

Document and knowledge management are not currently well supported by technology and processes remain heavily **paper-based**, although some centres have started to move towards paperless practices.

Websites are mission critical but most CLCs are dissatisfied with their current solution, with over 40% stating they need a new website.

Digital literacy is a major challenge across CLC teams (staff and volunteers).

CLASS is used by all centres, and for many this is the only client system in place. Many centres require other systems to support wider case and practice management processes.

Attempts to introduce interactive technology for clients (e.g. apps, bots) are met with mixed results.

Few centres are proficient in **email marketing and CRM**, and the sector lacks knowledge about the value of these capabilities.

Adoption of **online collaboration tools** is still in infancy with limited take up across the sector.

Source: Queensland CLCs Digital Strategy Survey (2019)

Key needs for the sector

There is widespread acknowledgement across the sector of the criticality of technology adoption to enable and support CLCs as sustainable organisations, and to strengthen their ability to deliver high-quality services and facilitate access to justice for vulnerable people. The sector has identified a number of priorities for digital improvements.

Outcomes sought from these improvements will lead to greater overall capacity for the sector, and positive impact for the communities it serves.

Priority need	Outcomes sought
💬 Community engagement	
New / better websites	▸ Improved online services delivery ▸ Greater client experience ▸ Effective online engagement ▸ Professional brand voice and image
CRM	▸ Stronger and sustainable relationships ▸ Greater reach of stakeholders for communications, advocacy and fundraising purposes ▸ Effective (i.e. targeted and relevant) communications
💼 Client Services	
CLASS usage	▸ Better adoption through system improvements and training ▸ Contribution to central national data set (sector-wide evidence reporting)
Practice management	▸ More efficient case management and services delivery through integration of CLASS with specialist practice management systems
Clients digital access to services	▸ Increased access to justice for clients (services and information) ▸ Increased reach of vulnerable, isolated client groups
📥 Operations	
Knowledge management & collaboration	▸ Efficiencies in managing and accessing files and documents ▸ Optimised collaboration within sector
Rostering capabilities	▸ Efficiencies in managing teams, volunteers and pro bono resources.

Priority need	Outcomes sought
Learning Management System	▸ More effective ways to onboard and train new staff and volunteers.
⬙ **Infrastructure, Training & Support**	
Infrastructure & IT support improvements	▸ More reliable technology solutions and reduced operational disruptions ▸ Cost-effective technology services procurement, delivery and operations
Technology/digital skills training	▸ Upskilled sector and more efficient teams ▸ Greater self-sufficiency for CLC teams
✎ **IT Management & Governance**	
Digital governance	▸ More informed decision-making on technology matters and choices ▸ Greater control of and access to technology investment
Technology risk management	▸ Safer organisation, data and people ▸ Mitigated risk of operational, financial and reputational damage

Whilst there are many technology products and services in the market to address these priorities, the selection and implementation of the "right" solution remains challenging given the breadth of technology offering and the unpredictable nature of new technology emergence. In addition, an individual CLC's own environment (organisation, characteristics, service offering, clients, strategic direction, programs, funding, resources, etc.) forms a unique set of constraints within which that CLC needs to operate.

Hence, whilst guidelines* can be provided on how to choose a technology provider and/or software for a particular area of need, it is not practical to determine a single technology solution that can be implemented systematically across the whole sector.

* See section <u>Resources directory</u> on page 40.

What else is happening in the digital space in the Australian CLC sector?

▸ Digital priorities identified for Queensland CLCs are not unique to the state and many CLCs across the country share similar needs (website, CRM, CLASS, practice management, document management, governance, etc.).

▸ In NSW and WA, state peak bodies have undertaken, or are undertaking, programs of work to deliver technology services to their member CLCs. These programs follow a centralised approach to digital capacity building with peak bodies taking on the role of technology providers, including services such as the development and hosting of websites, the implementation of CRM solutions, the migration of on-premise ageing email systems to Microsoft 365, or the set-up of cloud-based document management systems. These programs require significant investment and effort, both for the initial implementation of systems and the ongoing services delivery and support.

▸ In Victoria, there is no dedicated digital capacity building program, however, the Federation is developing an overall support strategy from which specific digital / technology needs may be identified. In addition, the Federation engages with external organisations on specific digital topics such as Victoria Legal Aid's online referral tool for legal services or the Victoria Law Foundation's research team.

▸ At national level, CLCA has undertaken a number of technology-related initiatives, with some additional projects in the pipeline:

  o development and ongoing support of CLASS as the national database for core client and case data management;

  o development of an API (Application Programming Interface) to allow integration between CLASS and other practice/case management systems (e.g. ActionStep);

  o provision of cybersecurity insurance to CLCA members;

  o development of a new edition of the Risk Management Guide with inclusion of technology risk management guidelines;

  o development of specific policies on data privacy and security;

  o potential for additional IT services provision (e.g. new accreditation portal on SharePoint, websites development).

Key challenges

The challenges to move the sector from its current state to one where digital capabilities are effectively embedded in CLCs' strategy and operations are significant. As small, independent not-for-profit organisations that rely on limited income sources and cannot generate revenue from service delivery, CLCs operate in a unique environment with numerous competing priorities and significant capacity constraints. A number of key themes emerged throughout the consultation process undertaken for the digital strategy development:

Priorities focused on **core** capabilities

Whilst there is some interest in innovative new technologies and how these are transforming legal services, needs and priorities identified for the CLC sector (e.g. websites, CRM, CLASS, practice management, document management, IT training, technical support, IT governance) highlight the focus on improving the core operations of CLCs and creating efficiencies.

Capacity is, and always will be, a challenge

As a key enabler of innovation, efficiency and sustainability, technology requires dedicated effort, capacity, and funding. A key challenge for CLCs is to balance this with the demands of service delivery priorities which typically take priority over longer-term digital capacity building. Hence, it is critical for the sector and its funders to recognise the need to support and fund digital capacity building initiatives "above and beyond" existing funding allocations.

One **size** does not fit all

The diversity of CLCs (size, services, location, clients, capacity, technology maturity levels, risk appetite, different technology needs and priorities, etc.) is a critical aspect that significantly impacts the development of a sector-wide digital strategy. Rather than aiming for all centres to use the same technology solutions suite across the sector, the approach needs to be flexible to reflect each centre's specific needs and constraints, and support centres in implementing solutions that are fit for their own organisation.

Collaboration is key

The sector has demonstrated in many areas the value of collaboration and sharing of knowledge, experiences, successes, and failures. CLCQ as a peak body plays a key role in fostering and facilitating collaboration amongst CLCs as well as broader sector stakeholders. Hence, the spirit of collaboration present many opportunities for CLCs to build their digital capacity and leverage from each other and from external stakeholders' key learnings and expertise in this area.

A wider legal sector disrupted by technology

▸ Although the legal profession has been relatively slow (compared to the financial or insurance services sectors for example) to embrace technology, law practitioners recognise technology is on the cusp of fundamentally altering the way people access justice, and the way legal services are provided. LegalTech is now a major area of growth with a proliferation of legal technology providers, start-ups and solutions, both in Australia and globally.

▸ Whilst access to technology is unprecedented, the offering is vast, which, combined with the fast pace of change in the digital space, creates an overwhelming environment for CLCs to make the right technology choices.

▸ Simultaneously, the technology offering presents major opportunities for the CLC sector, including the ability to access products and services under free or discounted purchasing or licensing agreements specifically developed for not-for-profit organisations.

▸ Key technology trends for the wider legal sector include moving to the cloud, mobility, virtual law firms, machine learning, robot lawyers, social media, cybersecurity, CRM, performance measurement, online services (including self-service portals) and electronic disclosure. However no trend dominates yet as a single mean of sector disruption (*Source: forbes.com*).

▸ Artificial intelligence and automation are set to drastically alter legal jobs, with McKinsey estimating that 22% of a lawyer's job and 35% of a paralegal's job can be automated.

▸ The legal sector as a whole now recognises the imperative to make greater use of technology to respond to changing consumer and client demands, expectations and behaviours. This is reflected in the sector acknowledging the need to not only adopt digital solutions, but also to prepare and train legal practitioners and law students in Information Technology skills.

▸ There are opportunities for the CLC sector to engage with stakeholders outside the sector on digital matters, including other legal service providers, education and research centres, and other groups or organisations with a focus on legal innovation and technology.

In 2017, the total known investment in LegalTech was USD 233M. In 2018, it was in excess of USD 1B. In 2019, the investment tally is set to be a record year. "*At this point, there is no turning back.*" (*Source: abovethelaw.com*)

Technology is enabling novel ways of accessing justice, including crowdfunding platforms that can be used by anyone to fund legal action (e.g. crowdjustice.com).

A collaborative approach to building digital capacity

Vision and mission

The vision:	The mission:	The strategy:
A community legal sector empowered by technology to provide access to justice for every client.	Build the digital capacity of the Queensland community legal sector.	A plan to help CLCs harness technology and close the digital gap.

# Autonomy, collaboration or centralisation for Queensland?

Given its diversity and make up, the CLC sector presents a unique set of challenges when it comes to defining an effective approach to digital capacity building. On one hand, CLCs share many common processes, requirements and challenges, and in that respect, could benefit from common technology solutions. On the other hand, each CLC has a unique set of constraints and needs: for example, a small rural specialist centre greatly differs from a large city-based generalist centre in terms of the services delivered, the client groups it serves, and its overall organisational capacity. As a result, there would be technology-related needs and priorities specific to each centre. Attempts across the Australian CLC sector at delivering common solutions have shown how difficult it is in practice, and the high level of effort, investment and collective buy-in it requires to succeed.

As part of the Digital Strategy development process, possible approaches for the Queensland CLC sector were reviewed and their pros and cons are shown below. Consultation with CLCs showed a collaborative approach is best suited to the sector:

| Autonomous *Each CLC runs its own technology programs independently from others*	Collaborative *CLCs access and share centralised resources and knowledge but run their own technology programs*	Centralised *A central "shared services" function provides technology products and services to CLCs*
+ Ability to address local CLC-specific needs and circumstances + No dependencies on anyone else (own needs, own decisions, own pace of change)	+ Tailored / opt-in approach + Some economies of scale through common resources + Greater opportunities for each CLC to learn and access technology, and address common problems	+ Economies of scale and less "reinventing of the wheel" + Risk shifted away from CLCs + Increased ability to stay up to date with technology
- Isolating, especially for smaller CLCs with little funding or resources - Costly / high demand on existing CLC capacity - Missed opportunities to learn and leverage from others' experiences	- Some CLCs could be "left behind" if not willing to participate - Challenging to maintain momentum and participation in the long run	- Catering for all centres can create dependencies and slow down overall adoption - Difficult to fund - Cannot be enforced

Strategic objectives

The approach to building digital capacity for the sector is centered around five key strategic areas:
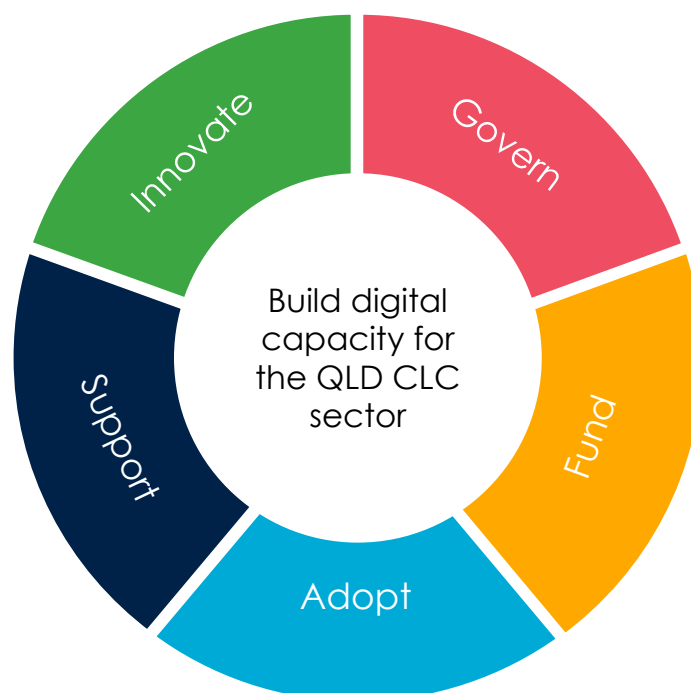
Strategic Area		Strategic Objectives
	Govern	▸ Enable CLCs to make informed decisions about technology, and plan and manage technology change and risks.
	Fund	▸ Enable funding of technology/digital initiatives above and beyond the baseline.
	Adopt	▸ Adopt digital solutions that address business priorities and are fit for purpose for the sector.
	Support	▸ Upskill and support CLCs and their teams in using technology and grow with them.
	Innovate	▸ Foster an innovation mindset and help the sector to prepare for successes and failures.

Govern
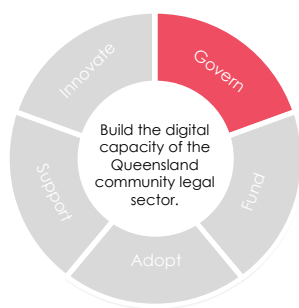
Objective:

Enable CLCs to make informed decisions about technology, and plan and manage technology change and risks.

Approach:

A fairly centralised approach to governance through the provision of sector-wide governance guidelines, best practices and standard policies for all CLCs to adopt and adapt to their own organisation.

CLC level	Centralised | Peak Body
▸ Get technology/digital issues on CLC leadership agenda and address as part of CLC strategic planning. ▸ Develop Digital/IT plans at CLC level, in line with CLC's strategic and operational plans. ▸ Protect organisation and data through adequate insurances and policies. ▸ Establish ownership and responsibilities within CLC of technology-related questions and decisions.	▸ Support CLCs in planning for technology at CLC level (guidelines). ▸ Include technology risk management in new Risk Management Guide (CLCA). ▸ Provide cybersecurity insurance (CLCA). ▸ Provide standard governance policies and guidelines for CLCs to adopt and adapt (CLCA, CLCQ). ▸ Liaise with sector stakeholders (DJAG, CLCA, others) on changes to digital / technology related compliance requirements. ▸ Explore at national level (in collaboration with other sector peak bodies) incorporation of technology and digital practices for centre accreditation.

For supporting digital capacity building resources for this strategic area, refer to the Resources Directory on page 40.

Fund
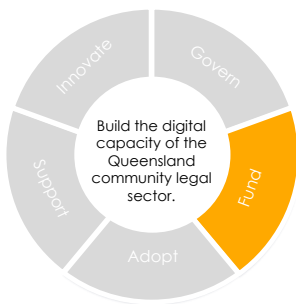
Objective:

Enable funding of technology/digital initiatives above and beyond the current quantum of funding.

Approach:

A funding strategy that places accountability and ownership with each CLC, and provides CLCs with support in sourcing, requesting and securing funding for technology and innovation projects, and in planning and managing technology spend.

CLC level	Centralised | Peak Body
‣ Plan budgets for IT spend (operational plan) and manage own tech funding. ‣ Leverage NFP discounts, offerings and pro bono opportunities. ‣ Submit funding requests to: ▸ DJAG (tech & innovation fund); ▸ alternative sources (grant makers, philanthropists, giving programs). ‣ Apply guiding principles to funding requests (see Guiding Principles Framework on page 42).	‣ Provide guidelines and template on developing IT budgets (operations and projects). ‣ Assist with application of Guiding Principles Framework. ‣ Identify and share alternative sources of funding / access to low-cost solutions and services.

For supporting digital capacity building resources for this strategic area, refer to the Resources Directory on page 40 and the Technology & Innovation Guiding Principles on page 42.

Adopt

Objective:

Implement digital solutions that address business priorities and are fit for purpose for the sector.

Approach:

A technology adoption approach that recognises the sector's diversity and enables CLCs to implement solutions that fit the needs and constraints of the organisation, whilst promoting the adoption of best practice systems and tools that support common needs and processes across the sector.

CLC level	Centralised | Peak Body
▸ Identify key business needs and priorities for CLC and plan for technology improvements. ▸ Apply guidelines for solution / vendor selection and new technology implementations. ▸ Leverage CLC/CLCQ network for existing solutions and lessons learnt. ▸ Participate in joint projects.	▸ Provide guidelines on sector needs and possible solutions. ▸ Identify and facilitate access to vendors for solutions commonly used. ▸ Plan and conduct regular (every other year) review of sector needs and solutions footprint through survey and/or focused groups, and share knowledge with other peak bodies. ▸ Help coordinate joint initiatives such as pilots across multiple CLCs. ▸ Keep sector informed.

For supporting digital capacity building resources for this strategic area, refer to the
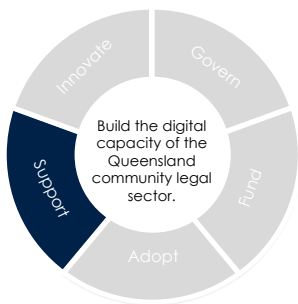
Support

Objective:

Upskill and support CLCs and their teams in using technology and grow with them.
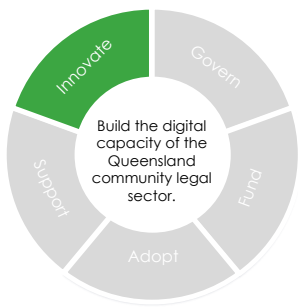
Approach:

An approach to technology support and training that focuses on effective operationalisation of systems and addresses the importance of building and maintaining digital skills across the sector.

CLC level	Centralised | Peak Body
▸ Identify support and training needs and inform CLCQ. ▸ Formally incorporate tech/digital training in organisation skills development. ▸ Address training needs and gaps at operational, executive and board levels. ▸ Establish cost-effective support agreements with external vendors. ▸ Share experience with current support providers and help identify suitable providers for the sector.	▸ Curate and facilitate access to digital / tech skills training and resources (online resources, webinars, workshops, conference sessions, etc.). ▸ Provide guidelines and/or template IT support vendor agreements. ▸ Source and facilitate access to IT support vendor(s), working with CLCs to identify existing providers and suitability to the sector as potential central providers.

For supporting digital capacity building resources for this strategic area, refer to the

Innovate

Objective:

Foster an innovation mindset and help the sector to prepare for successes and failures.

Approach:

An approach that recognises the potential of emerging technology trends in the legal sector and the opportunities they present for the CLC sector, and promotes a risk-prepared approach to innovating through technology.

CLC level	Centralised | Peak Body
‣ Establish innovation "profile" and determine centre's approach. ‣ Identify opportunities to innovate. ‣ Participate in innovation conversations. ‣ Share innovation projects and lessons learnt with CLCQ and the sector.	‣ Provide guidelines and practical tools on approaching innovation at CLC level. ‣ Form central innovation hub / forum and facilitate innovation conversations. ‣ Identify and share innovation sources (e.g. forums, hackathon, conferences). ‣ Engage with external stakeholders and keep sector informed of innovation trends.

*For supporting digital capacity building resources for this strategic area, refer to the *

A roadmap for digital strategy execution

Roadmap overview

The roadmap provides a plan to execute the strategy across the following:

Work Package	Description
1 – Sector Engagement	Activities related to communicating and engaging with the sector on digital capacity building such as meetings, forums, conferences, workshops, working groups, etc.
2 – Knowledge Development & Sharing	Activities related to the development of resources that can assist CLCs in evaluating, selecting, implementing, using and managing technology solutions and projects, and the publication and dissemination of these resources across the sector.
3 – Digital/Technology Projects	Activities related to the implementation of specific digital solutions within the sector: ▸ independent projects: solutions implemented by each CLC independently; ▸ joint projects: solutions implemented by multiple CLCs.
4 – Partnerships Development	Activities related to the identification of possible partners within and outside the sector who can contribute to digital capacity building initiatives including: ▸ other CLC peak bodies and organisations (outside Queensland); ▸ associations and organisations working within the Legal Tech sector; ▸ other legal services and / or technology organisations with potential to provide pro bono or discounted services; ▸ organisations with potential to participate in joint projects and studies.

The roadmap overleaf provides a summary of activities, resources, timeframe and outcomes sought in each area of work. Subsequent sections provide additional details for each of the work packages. Note that the roadmap should be considered as a starting point, and used as an iterative tool for planning, tracking and adapting the schedule for the program of work in order to reflect evolving needs and priorities, decisions, changes, and capacity levels.

Resourcing the implementation of the Digital Strategy

▸ The implementation of the Digital Strategy will require dedicated resourcing from the sector, and associated requirements have been defined for capacity expected from both:

o CLCQ as the overall owner of the strategy and coordinator of activities;

o CLCs as participants in implementation activities.

▸ Given the known capacity constraints of the sector, the requirements have been estimated to optimise the limited availability of resources whilst supporting ongoing involvement from the sector:

o The Digital Capacity Building working group (see Sector Engagement on page 28) will require a commitment of 2 to 3 days per quarter from designated CLCs representatives to meet quarterly and participate in other group communications and activities.

o Given centres have limited capacity, it will be challenging, especially for smaller centres, to commit resource time. Hence, it is recommended that nominated working group members take on a sector representation role and help coordinate input and feedback with other centres. Defining these mechanisms will be an initial task to carry out for the working group as members determine their terms of reference and working mode.

▸ There will be a number of activities that will require additional resourcing, such as:

o Individual digital/technology projects undertaken by a CLC: these projects will need to be resourced and funded by the CLC (either from existing resources or through grant/other funding opportunities sourced by the CLC).

o Joint digital/technology projects undertaken by multiple CLCs as part of the Digital Strategy work: these projects will need to be resourced and funded independently (see Digital/Technology Projects on page 32).

o Development of knowledge, tools, templates, etc. that require capacity beyond available resourcing: these may require additional funding and/or sourcing of pro bono services.

	ACTIVITIES	RESOURCES	TIMEFRAME	OUTCOMES
1 Sector engagement	‣ Communication and facilitation of sector discussions, meetings, workshops and contribution to digital capacity building	‣ **CLCQ**: facilitate and act as central point of coordination ‣ **CLCs**: participate in communications and engagement activities	‣ **Q1 2020:** Digital Working Group is formed ‣ **Q2 2020>>:** Regular program of communications and interactions with sector	‣ CLCs are actively engaged in building digital capacity and regularly participate in cross-sector related activities
2 Knowledge development & sharing	‣ Source and develop resources for CLCs to adopt and adapt such as guidelines, checklist, best practice templates and case studies	‣ **CLCQ**: coordinate sourcing, development and access to resources ‣ **CLCs**: contribute lessons learnt and other resources	‣ **Q1 2020:** make first set of resources available on CLCQ website ‣ **Q2 2020>>:** add and update resources on ongoing basis	‣ CLCs have access to useful resources to build their digital capability, and keep abreast of technology trends relevant to the sector
3 Digital / technology projects	‣ Identify candidates for joint technology projects, fund and deliver selected initiatives	‣ **CLCQ**: coordinate joint projects ‣ **CLCs**: deliver own projects, participate in joint projects	‣ **Q2 2020:** CLCs apply for funding for own projects, working group initiates a pilot project. ‣ **2021>>**: develop roadmap for other joint projects	‣ CLCs collaborate to implement common digital solutions, develop lessons learnt and apply to ongoing digital capabilities development
4 Partnerships Development	‣ Build on initial relationships identified in strategy phase ‣ Establish partnerships within and outside the sector	‣ **CLCQ**: coordinator for developing relationships with external partners ‣ **CLCs**: contributors to relationship development	‣ **Q1-Q2 2020:** source key partners and establish relationships ‣ **Q3 2020>>**: engage with new partners and manage relationships	‣ CLCs have access to partners who provide assistance, services and insights into digital and technology initiatives.

1 - Sector Engagement

Activities	2020				2021			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Socialise digital strategy within sector								
▸ Communicate to sector	■							
▸ Publish paper + initial set of resources (CLCQ website)	■							
▸ Facilitate strategy presentation / Q&A sessions (online / webinar)	■							
Establish ongoing working group								
▸ Secure participation from CLCs	■							
▸ Form Digital Capacity Building working group and define terms of reference	■							
▸ Develop collaboration sessions ("unconferences") calendar and format	■							
▸ Run quarterly collaboration sessions and share sessions outputs with rest of sector	■	■	■	■	■	■	■	■
Run communications program with sector								
▸ Determine communications mechanisms and calendar (e-newsletter, updates at conferences, leadership sessions etc.)	■							
▸ Deliver regular communications to sector	■	■	■	■	■	■	■	■

Recommendations:

Digital Capacity Working Group:

▸ Build on Working Group formed during the Digital Strategy Development phase and form collaborative group made of representatives from CLCQ and Queensland CLCs (open to all CLCs).

▶ Request minimum commitment from members (see resourcing below) and retain flexibility for members to join later.

▶ Define terms of reference as a group: objectives, communication mechanisms, roles, calendar of activities, topics for collaboration sessions, etc.

Ideas for Working Group "unconferences":

▶ Hosted by a different centre every time

▶ Online collaboration space for ad hoc online discussions

▶ Open other sector stakeholders to participate (e.g. CLCA, other peak bodies, funder, external speakers, etc.)

▶ Mix practical topics (e.g. how to, expert sessions, lessons learnt) and ideation/brainstorming exercises.

Integrate communications about digital within wider sector comms plan:

▶ Leverage existing communications channels and tools to include digital and technology topics, news, updates and discussion. Existing communications mechanisms include CLCQ e-newsletters and other email marketing, CLCQ conferences, leadership forums, etc.

▶ Experiment with digital tools to communicate and engage with sector to inform which digital channels and mechanisms work well, and which don't. Review and adjust based on effectiveness, and share learnings with sector. Example tools include website (CLCQ), email marketing (Mailchimp), Slack, Microsoft Teams, SharePoint, GoToMeeting or Zoom for online conferencing, etc.

▶ Involve Working Group in defining how best to engage and communicate with the sector, and seek wider sector participation to suggest topics and updates.

Resourcing:

CLCs	CLCQ
▶ Nominate representatives for the Digital Capacity Building working group ▶ Take part in discussions and activities ▶ Identify key point of contact for digital capacity matters and projects	▶ Develop and manage all communications with sector ▶ Facilitate organisation of meetings, conferences, unconferences, workshops ▶ Oversee membership and operations of the Digital Capacity Building working group
▶ Estimated effort: 2-3 days per quarter for designated working group members	▶ Estimated effort: 0.5 to 1 day per week.

(1 day for workshop, 1 -2 days for other activities)

2 - Knowledge Development & Sharing

Activities	2020				2021			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Develop knowledge resources for sector								
▸ Make first resources available online (CLCQ website)	■							
▸ Develop resources (see Resources directory), identify other useful resources, develop and/or source	▬	▬	▬	▬	▬	▬	▬	▬
Promote sector knowledge sharing								
▸ Seek contributions from sector	▬	▬	▬	▬	▬	▬	▬	▬
▸ Integrate knowledge sharing in communications plan	▬	▬	▬	▬	▬	▬	▬	▬
Make knowledge base available to sector								
▸ Utilise technology to disseminate / facilitate access to tools and training (e.g. website, webinars, videos, podcast)	▬	▬	▬	▬	▬	▬	▬	▬
▸ Explore development of knowledge base using technology like online checklists, wikis, forums, etc.					▬	▬	▬	▬

Recommendations:

Building and sharing knowledge about digital

▸ Many digital and technology resources exist already; however, it can be time-consuming to source the right artefact, template or material. Hence, knowledge development is more about

curating content and "sifting through the noise" than developing resources from scratch. Materials should be sourced and adapted first, and created only when no resource can be found or easily accessed.

▸ Other organisations in the wider CLC sector have developed resources such as policies and training materials, and these should be reviewed and leveraged where adequate. In turn, sharing Queensland resources back with the wider sector will benefit all CLCs.

▸ Pro-bono resources may be an option when looking at sourcing and developing resources requested by the sector (see section "Partnerships development" on page 35).

▸ For an overview and list of resources to be made available as part of the Digital Strategy, refer to section "Resources" on page 38.

Resourcing:

CLCs	CLCQ
▸ Contribute best practices and templates. ▸ Submit ideas and requests for resources. ▸ Participate in knowledge sharing. ▸ Contribute lessons learnt. ▸ Submit stories and case studies.	▸ Source, develop, adapt and curate content and resources. ▸ Seek and encourage ideas, requests and contributions from the sector. ▸ Share sector contributions with broader stakeholders group. ▸ Seek and encourage contributions from external stakeholders (CLC sector and beyond).
▸ Estimated effort: minimal, as and when applicable.	▸ Estimated effort: 0.5 to 1 day per week for first 6 months, then 0.25 to 0.5 day per week. Additional ad hoc effort when specific requests are raised by sector.

Note that whilst developing resources will not be a task for the Digital Capacity Building working group, the group can help identify needs for new resources as part of its ongoing collaboration activities.

3 - Digital / Technology Projects

Activities	2020				2021			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
CLCs to run their own digital / technology projects								
▸ Identify needs and projects at CLC level and develop project proposals	■							
▸ Apply for funding to DJAG's Technology & Innovation fund		■						
▸ Deliver projects at CLC level		▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬						
Identify and run joint pilot project for the sector								
▸ Identify and select idea and candidate CLCs	■							
▸ Select idea and secure funding		■						
▸ Confirm participation from CLCs		■						
▸ Deliver pilot project		▬▬▬▬▬						
Develop approach for sector's joint projects								
▸ Conduct pilot post-implementation review, document and share lessons learnt				■				
▸ Determine next steps for pilot (Pivot, Persevere or Perish)				■				
▸ Develop wider projects roadmap for the sector based on pilot outcomes				■				
▸ Based on previous activities outcomes, deliver projects roadmap					▬▬▬▬▬▬▬▬▬▬			

Recommendations:

CLC-specific projects

▸ As each CLC has specific needs and "starting point" for digital improvements, it is important for CLCs to retain their autonomy for implementing their own technology change and solutions.

▸ CLCs should identify projects that require investment into technology and develop their proposals. CLCs should refer to the "Technology and Innovation Guiding Principles" on page 42 developed as part of the Digital Strategy work.

▸ The Technology and Innovation fund provided by DJAG is scheduled to open for submissions in mid-2020 (subject to Departmental timeframes/processes).

Joint projects

▸ Whilst there is value in CLCs joining forces to address common problems, in practice implementing shared solutions presents many challenges. A pilot approach to an initial joint project provides a path for trialling whilst mitigating risks.

▸ A "Minimal Viable Product" strategy is recommended to avoid project scope and budget "blow out" and test that the project is achievable in practice.

▸ A pilot approach relies on an opt-in, voluntary participation by CLC. It is recommended that the project is coordinated by CLCQ with commitment from participating CLCs in terms of project participation and resourcing.

▸ Joint projects should be **funded and resourced independently** from other digital strategy implementation activities.

Pilot outcomes decisions

The "pivot, persevere or perish" process helps determine how to move forward with a project, product or service once its first iteration has been delivered:

▸ **pivot**: the project continues but changes approach (e.g. the processes work but the technical solution needs to be changed);

▸ **persevere**: the project continues, using the original approach, but expands (e.g. additional technical functionalities, additional CLCs involved);

▸ **perish**: project stops (outcomes from pilot show it's not worthwhile pursing and/or there is no capacity to do so).

Resourcing:

CLCs	CLCQ
▸ Identify, fund and deliver own projects. ▸ Participate in joint projects (voluntary participation) and commit resources.	▸ Coordinate joint projects planning, funding, delivery and outcomes. ▸ Facilitate CLCs participation in joint projects.
▸ Estimated effort: to be determined by project (resourcing to be sourced and funded above current capacity).	▸ Estimated effort: to be determined by project (resourcing to be sourced and funded above current capacity).

Joint projects: brainstorming ideas for piloting common digital solutions

▸ A number of ideas for joint projects were identified as part of the consultation with the Digital Strategy working group. These include:

   o improving the intake and triage process through technology;

   o enabling online referrals for clients;

   o enabling paperless practices;

   o implementing document management and collaboration through MS SharePoint;

   o integrating practice management software with CLASS;

   o develop Artificial Intelligence (AI) to crawl public websites to answer simple legal information questions.

▸ In addition to the above, it is recommended to refer to the needs and priorities identified for the sector (see section "Key needs for the sector" on page 10) as potential candidates (e.g. CRM, rostering tool, or a Learning Management System).

▸ The ideation process should be continued as part of the strategy implementation activities with the Digital Capacity Building working group to determine which project to pursue as a trial pilot.

▸ Close attention should be paid to problem definition first to ensure there are clear objectives for the project. In many cases, technology will come later: techniques such as process mapping, paper prototyping and user-centered design help define the problem before working on the solution. These techniques provide effective and cost-efficient ways of working towards a solution before investing into technical development. They also help identify constraints that may apply to a particular digital solution. For example, a mobile app might be well designed and user-friendly, but if the target client group does not have adequate access to mobile technology, the app won't be successfully used.

▸ Finally, joint projects don't have to be confined to Queensland CLCs and can involve other organisations such as other sector peak bodies, interstate CLCs, law or technology firms with pro bono resources, and/or external organisations – see next section "Partnership Development".

4 - Partnerships Development

Activities	2020				2021			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Develop CLC sector partnerships								
▸ Liaise with CLCA for national systems improvements and support (CLASS), risk management guide and policy development.								
▸ Liaise with other CLC state peak bodies to identify collaboration opportunities and share knowledge								
Develop external partnerships								
▸ Build relationships with legal tech and innovation specialist groups								
▸ Build relationships with professional legal services firms for pro bono support								
▸ Identify key technology providers for IT support and services and explore possible procurement agreements								
▸ Participate in relevant external forums, conferences and roundtables								

Recommendations:

Building capacity through relationships

▸ As Queensland CLCs experience challenges and needs that apply across a wider group of stakeholders (overall national CLC sector, legal sector, community services), there are opportunities to establish relationships and seek partnerships within and beyond the sector to support the digital capacity building effort.

As Queensland mandates its panel law firms to meet pro bono targets*, there are increased opportunities for CLCs to access and leverage law firms resources.

Options** for law firms to create pro bono impact in the digital capacity building space include sharing a tech tool developed in-house, volunteer an IT professional, sponsoring a CLC lawyer to attend a tech conference, host a workshop, pay for a license, etc.

*Source: lawyersweekly.com.au
**Source: Andrea Perry-Petersen

▸ The table below provides a breakdown of stakeholder groups and an initial list of possible organisations to engage with on digital initiatives.

Stakeholder Group	Possible organisations
▸ Queensland CLC sector - CLCs and peak body	▸ All CLCs in Queensland ▸ CLCQ
▸ National CLC sector - Other peak bodies and CLCs across Australia	▸ CLCs in other states ▸ Other CLC peak bodies ▸ CLCA
▸ Funders - Funders of technology projects	▸ DJAG ▸ Queensland Government (Small Business Digital Grants Program) ▸ Google's annual impact challenge ▸ Other grants makers philanthropic institutes
▸ Wider legal and community services sector - Research centres - Education providers (universities and law schools) - LegalTech specialists - Other legal services providers (commercial and community)	▸ Legal services providers like Legal Aid Queensland or Justice Connect (currently undertaking work in the Access to Justice space) for possible joint initiatives. ▸ Specialist associations and interest groups such as: - ALTA (Australian Legal Technology Association): option for discounted membership for CLCs under review - Centre for Legal Innovation (College of Law): special interest groups in LegalTech and A2J (Access to Justice) ▸ Legal firms with pro bono resources (including technical staff, facilities and material resources) ▸ LegalTech specialists like NeotaLogic (pro bono program in partnership with universities),

Stakeholder Group	Possible organisations
	AlphaCreates (legal innovation, strategy and technology specialists)
▶ Technology vendors/ providers	▶ Connecting Up: access to free or discounted products (software and hardware), services and training, and technology providers directory.
	▶ Technology providers with non-profit offering (discounted or free) such as:
	o Productivity suites: Google, Microsoft
	o CRM: Microsoft Dynamics, Salesforce
	o Project management and collaboration: Atlassian, Slack, Trello
	o Financial systems: XERO, MYOB, NetSuite, QuickBooks
	o Networking and security: Citrix, Cisco, Symantec
	▶ Online technology training providers like Lynda.com (part of LinkedIn – note that access is sometimes freely available in public services centres like local libraries).

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Resourcing:

CLCs	CLCQ
▶ Identify existing partnerships and potential for extension across sector. ▶ Participate in external digital and technology forums (optional).	▶ Build relationships with other organisations on behalf of Queensland CLC sector. ▶ Seek and secure participation from pro bono providers and other organisations. ▶ Identify grant makers and funding organisations. ▶ Identify and coordinate memberships of specialist organisations or associations. ▶ Represent sector at external events and bring Queensland CLC sector voice to the legal tech conversation.
▶ Estimated time requirement: minimal, as and when needed.	▶ Estimated time requirement: 0.5 day per week first 6 months, then 0.25 day per week.

Resources for digital capacity building

Resources overview

To support the implementation of the digital strategy, a number of resources are developed and made available to the sector. These resources aim to provide practical means to CLCs to assess, plan, initiate and deliver digital change in their organisations. The development of resources about technology topics should be considered an ongoing and iterative activity, with knowledge built and shared on an ongoing basis and reflecting the evolving needs of the sector. Where possible, existing sources of information should be researched first (within the CLC sector and outside), and resources adapted to the sector as and when necessary.

Resources provided to the sector include:

▸ reference documentation (this paper);

▸ guidelines and best practices (including documents and links to external sources of information);

▸ tools, templates and checklists.

CLCQ will play a leading role in developing, curating, adapting and making content available to the sector, and CLCs will be encouraged to also contribute their own resources to the resulting knowledge base. Resources will be made available online via the CLCQ website.

Resources directory

The table below provides an initial list of recommended resources (in addition to this paper) that various stakeholders in the sector will aim to develop over 2020-2021 (dependent on funding and resourcing). As they are developed, they will be made available to the sector as part of the Digital Strategy Implementation.

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Strategic Area	Resource	Resource Type	Availability*
Govern	▸ Developing an IT plan	▸ Guidelines	▸ Q1 2020
	▸ Assessing your CLC's digital capacity	▸ Self-assessment questionnaire / checklist	▸ Q1 2020
	▸ Updated Risk Management Guide	▸ Guidelines (CLCA)	▸ Q4 2020
	▸ Data privacy policy	▸ Guidelines (CLCA)	▸ Q3 2020
	▸ IT P&Ps for your centre	▸ Templates	▸ Q1 2020
Fund	▸ Budgeting for technology spend	▸ Guidelines + template	▸ Q1 2020
	▸ Accessing free or discounted digital products and services	▸ Guidelines	▸ Q1 2020
	▸ Applying for funding: technology & innovation guiding principles	▸ Guidelines	▸ Q1 2020
Adopt	▸ Implementing a new website	▸ Guidelines + template	▸ Q1 2020
	▸ Assessing the suitability of CRM for your centre	▸ Guidelines + checklist	▸ Q2 2020

Strategic Area	Resource	Resource Type	Availability*
	▶ Integrating your systems with CLASS	▶ Guidelines (CLCA)	▶ Q3-Q4 2020
	▶ Moving document management to the cloud	▶ Guidelines	▶ Q2 2021
	▶ Selecting technology vendors and solutions	▶ Guidelines and checklist	▶ Q1 2020
Support	▶ Assessing your team's digital literacy	▶ Guidelines and checklist	▶ Q1 2021
	▶ Accessing good IT and digital skills training	▶ Guidelines and external sources	▶ Q1 2021
	▶ Sourcing an IT support provider	▶ Guidelines	▶ Q4 2020
Innovate	▶ LegalTech: useful sources for sector trends and insights	▶ Guidelines	▶ Q1 2020
	▶ Working out your CLC innovation profile	▶ Checklist	▶ Q1 2020

Indicative timeframe, and subject to funding and resourcing availability.

# Annexure: technology & innovation guiding principles

Overview

The Innovation & Technology Guiding Principles aim to promote the adoption of fit-for-purpose technology solutions by the Queensland CLC sector whilst managing the inherent risk associated with digital innovation.

The guiding principles have been developed to:

▸ encourage digital innovation within the sector and support CLCs in initiating technology-related initiatives;

▸ promote a concerted approach to digital adoption to focus on technologies that deliver tangible and positive impact for the sector and the community;

▸ help CLCs define and qualify their technology needs in a comprehensive manner that takes into account outcomes, capacity, risks, readiness for change and key assumptions made;

▸ promote cross-sector collaboration and support knowledge sharing between CLCs;

▸ assist CLCs in developing their requests for funding for technology-related initiatives;

▸ assist funders in evaluating these applications and inform funding decisions.

The guiding principles framework is structured around four core principles, each supported by a set of guidelines and funding criteria:

▸ **principle**: the core proposition that serves as the foundation for articulating a set of funding guidelines and criteria.

▸ **guideline**: the main rules and recommendations applicable under that principle.

▸ **criteria**: the standard by which a technology-related funding request should be developed and evaluated against.
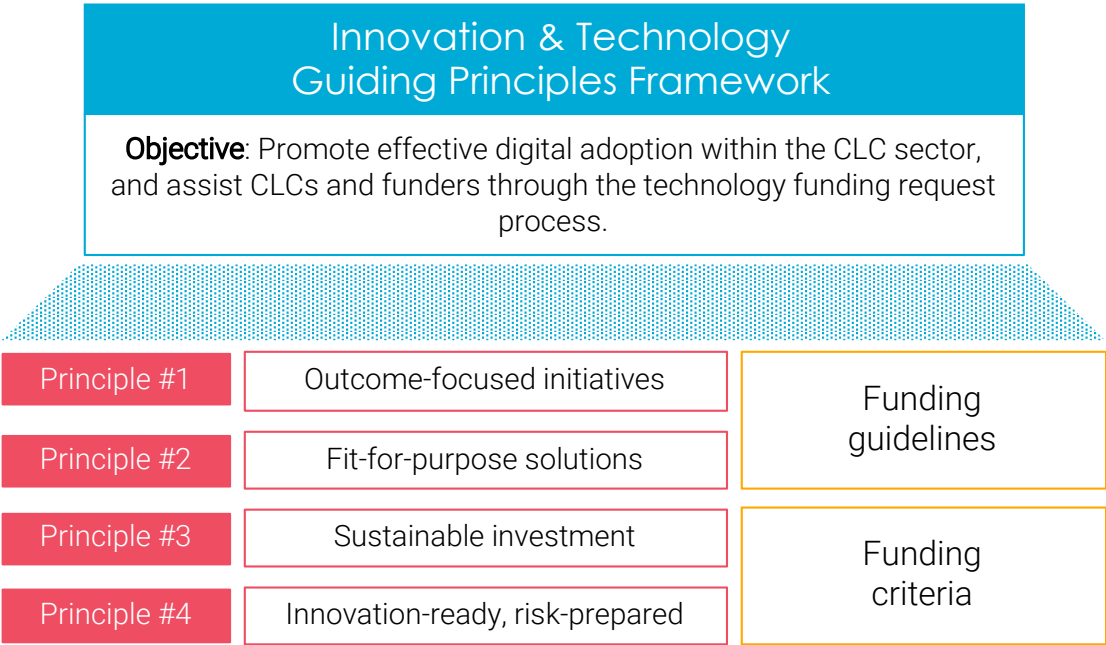
Principle #1 OUTCOME-FOCUSED INITIATIVES

Objective: To promote technology initiatives that aim to deliver tangible impact and positive outcomes for the sector and the community	Weighting Factor:	25%

Guidelines	Criteria
- Funding requests should address a clearly articulated need or problem, with technology as a key component of the solution to that problem. - Funding requests should have direct and indirect benefits for the sector and / or the community, and technology will enable the delivery of those benefits. - The project should include an evaluation of outcomes (positive and negative). - Requesting organisations should consider, if relevant (i.e. where the needs are not unique to the centre), the potential for the project or technology to benefit the sector.	- The technology has clear, measurable benefits for clients and/or the wider community, either directly or indirectly. - The technology supports the requesting organisation's capacity building and/or service delivery activities and aligns with its strategic objectives. - The project considers client-centered and learning-centred approaches to technology design and implementation.

Principle #2: FIT-FOR-PURPOSE SOLUTIONS

Objective: To promote the selection and adoption of technologies that fulfil the project's needs, and support end-user adoption, usage and operational sustainability.

Weighting Factor:	25%

Guidelines	Criteria
• The project should have well defined business needs for the solution sought, including key assumptions related to technology, audience, suitability, costs, adoption and operationalisation. • The solution sought should take into account compliance requirements for technology usage including data collection, access, privacy and security standards. • The solution sought should take into account accessibility constraints and requirements, particularly for technologies to be used by clients. • Where the technology needs are not unique to the centre, consideration should be given to existing technologies and the opportunity to leverage, where possible, solutions successfully used within the sector or comparable organisations.	• There is a well-defined scope for the solution sought, or the project has clearly identified and planned solution scoping activities. • The technology/solution sought addresses compliance, security and accessibility requirements, and there is consideration for end-user training, on-going maintenance and development of that technology. • The project has identified whether there are existing solutions or technologies available that have the potential to fulfil the needs of the project.

Principle #3: SUSTAINABLE INVESTMENT

Objective: To ensure accurate planning of technology investment, encourage access to affordable technologies, and ensure continuation of technology operations beyond initial funding.

Weighting Factor: 25%

Guidelines

- The project should consider upfront the Total Cost of Ownership of the solution sought, covering implementation costs (scoping, design, development, marketing, end-user training, etc.) and ongoing operational costs (support, maintenance, license and hosting fees, continuous improvement).

- The project should identify demands on internal resources/skills and assess available vs required capacity to deliver the solution, and include external expertise costs where applicable.

- The project should seek where possible non-profit price offering available for the type of solution sought (licenses, hosting, technology providers' services fees).

- Where possible, the project should consider cost-sharing opportunities and flexible procurement options.

- If applicable, the project may consider potential income generation opportunities from the technology developed, whilst maintaining the principle of free access to legal services for clients.

Criteria

- There is a well-defined investment approach and budget for the initiative that takes into account ongoing operationalisation of the technology beyond the initial funding period.

- The budget includes contingency and provisions for possible hidden costs and unknowns.

- The investment required takes into account internal resourcing requirements, either through reallocation of existing resource time or sourcing of new resource(s).

- The project will leverage opportunities for reducing the cost of technology through access to non-profit pricing (donations or discounts), and/or shared costs with other sector organisations.

Principle #4: INNOVATION-READY, RISK-PREPARED

Objective: To promote innovation across sector whilst addressing the inherent risk associated to new technology adoption, and ensure good governance over technology-related decisions.

Weighting Factor:	25%

Guidelines

- The project should identify and qualify key risks (likelihood and impact).

- The project should define a risk profile for the technology solution sought, from low (existing, proven technology) to high (highly innovative, not done anywhere else).

- The requesting organisation should assess its innovation readiness and capacity to drive the project to completion.

- The project should have evaluation mechanisms in place that measure outcomes, including in case of project failure.

- The project should seek contributions and lessons learnt from other organisations (within or outside the sector) for a similar technology.

- Where the centre does not have internal expertise, it should seek advice and input from technology experts (project risk assessment, budgeting, approach, etc.)

Criteria

- There is a well-described risk assessment profile for the project and the associated technology sought.

- The requesting organisation recognises the level of risk, has defined appropriate risk mitigation responses, and has included a lessons learnt evaluation process in case of failure.

- The requesting organisation has governance in place to review and make decisions about the project.

- The project has planned for post-implementation evaluation.

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Queensland CLC Sector Digital Strategy Paper (2020)