DATA DASHBOARD
Legal Ladies
OUR TEAM
Legal Ladies

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PROBLEM CONTEXT

Poor tracking and reporting on client data, status, and program-specific metrics, resulting in lack of streamlined data presentation capabilities.
PROBLEM STATEMENT

How can Sound Legal Aid enhance data based decision-making by effectively tracking client information thereby ensuring better assistance and representation for their clients?
Research Methodologies Used

- Staff Interview
- Contextual Inquiry
- Fly on the Wall Observation

Understanding stakeholder workflows was crucial to optimizing their daily tasks with the dashboard, so we mainly employed qualitative + observational methods.
KEY RESEARCH INSIGHTS
User Research

Research Questions
● What do staff members’ typical days look like and what consumes most of their time?

Hypothesis and Assumptions
● Executive Director: Dealing with program budgeting, finding funding, making decisions about how to expand the program
● Volunteer Program Manager: recruits and onboards volunteers and oversees client intake
● Managing Attorney: works on clients' cases and provides legal aid and oversees other attorneys
Looked at Various Dashboard & Legal Case Management Platforms

Takeaways

- Report Generation: insights about data visualization
- Case Management: Evaluates client data, case tracking, and information aggregation

Our Integration

- Understood what kind of reports to create and how to organize data
"Dashboard Design Examples: How We Made the Data Display Choices and What Drove Us"

- **Summary:** Analyzes the different types of dashboards created by the Eleken design team and explain certain design decisions were made for different applications.

- **Relevance:** This source helped us determine that we wanted to create an analytical dashboard as our solution, as we want our "users to slice and dice data points across multiple variables."

Takeaways:
- If you have to present a great deal of data, try to divide the dashboard into tabs (here: overview, calendar, tasks, and activity);
- mind the fonts and the spacing when presenting plain numbers.
"Technologies that Should Be in Place in a Legal Aid Office Today"

- **Summary:** This source lists different systems that should be in a legal aid office, along with functions, considerations, and useful resources. The source highlights improvements in crucial areas such as management of client and case data, supervision of legal work, records management, and administration.

- **Relevance:** Helpful to determine the type of features that we would like to implement in our system.

<table>
<thead>
<tr>
<th>Purpose served</th>
<th>What should be in place</th>
<th>Needed capacities or functions</th>
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<tbody>
<tr>
<td>MANAGEMENT OF CLIENT AND CASE DATA</td>
<td>Case management system (cont’d)</td>
<td>- Capacity to generate reports and extract meaningful data for strategic planning, program evaluation and other purposes</td>
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<td>- Ability to assign the appropriate funding source to cases.</td>
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<td>- CMS software should allow the end user to easily customize, without vendor assistance, various aspects of the application (e.g. changing reporting requirements, adding/deleting data fields as needed)</td>
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Focused on legal clients and their issues, dashboard design choices, legal aid office operations

- Improved User + Client Experience
- Data Storytelling
- Time Consuming Operations
- Platform Integration
- Efficiency and Scalability
Challenges in accessing and utilizing client data effectively for reporting.

Improve efficiency in reporting and analysis

Enhance accessibility and scalability of tools

Problems and Needs

Sandra Miller
Executive Program Director
SOLUTION APPROACH

- Comprehensive dashboard that aggregates client data into key insights and visualizations
- Shows what Sound Legal Aid is doing
- Very easy to use
- Intuitive UI to focus on key metrics
RAPID PROTOTYPING

Concept Validation

Home Page

- Demographics of Clients
- Number of Cases (type: Domestic Violence) over time
- Quick Statistics like number of pro bono hours, active volunteers, and open cases in the moment
RAPID PROTOTYPING

Concept Validation

Clients Page

- Total number of clients served per program
- Total number of clients needing service
- Total number of clients served total
- Total of clients overtime by case type
● Employed task-based testing to test intuitiveness and ease of readability
● Tested with executive director, volunteer program manager and an attorney

Implemented feedback in final solution
KEY FEATURES

Breakdowns by various data attributes:

- Key visualizations such as breakdown of clients through race, county of origin and legal problem distribution
- Color range for ease of readability
Interactive Visualizations: Show count of data in addition to percentage breakdowns with tooltips on hover
Granular Filters:
- Date range
- Legal problem type
- County of dispute

For precision to address specific data/research questions.
VERSATILE VISUALIZATIONS:
Wide variety of visualizations present to best support users in viewing data for different purposes

- Volume of data with bar graphs
- Proportions of data attributes with pie charts
- Visualize individual records with tables

KEY FEATURES
Report Downloads: Easy and safe sharing for stakeholders to be able to use for various purposes (grant applications, sharing impact with news sources).
KEY FEATURES

Responsive: Responsive Screen sizing for mobile and web
CONSIDERATIONS

Data Accuracy

Data Storage
ETHICAL CONSIDERATIONS

Misrepresentation of Data

Misrepresentation of Groups
NEXT STEPS

Implementation
Help Sound Legal Aid get set up with dashboard

Handoff
Ensure smooth transfer to Sound Legal Aid through providing all necessary documentation

Scaling
Eventually aim to have other nonprofit legal organizations utilize a dashboard like this