



DATA DASHBOARD

Legal Ladies



OUR TEAM

Legal Ladies



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UX Designer



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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?

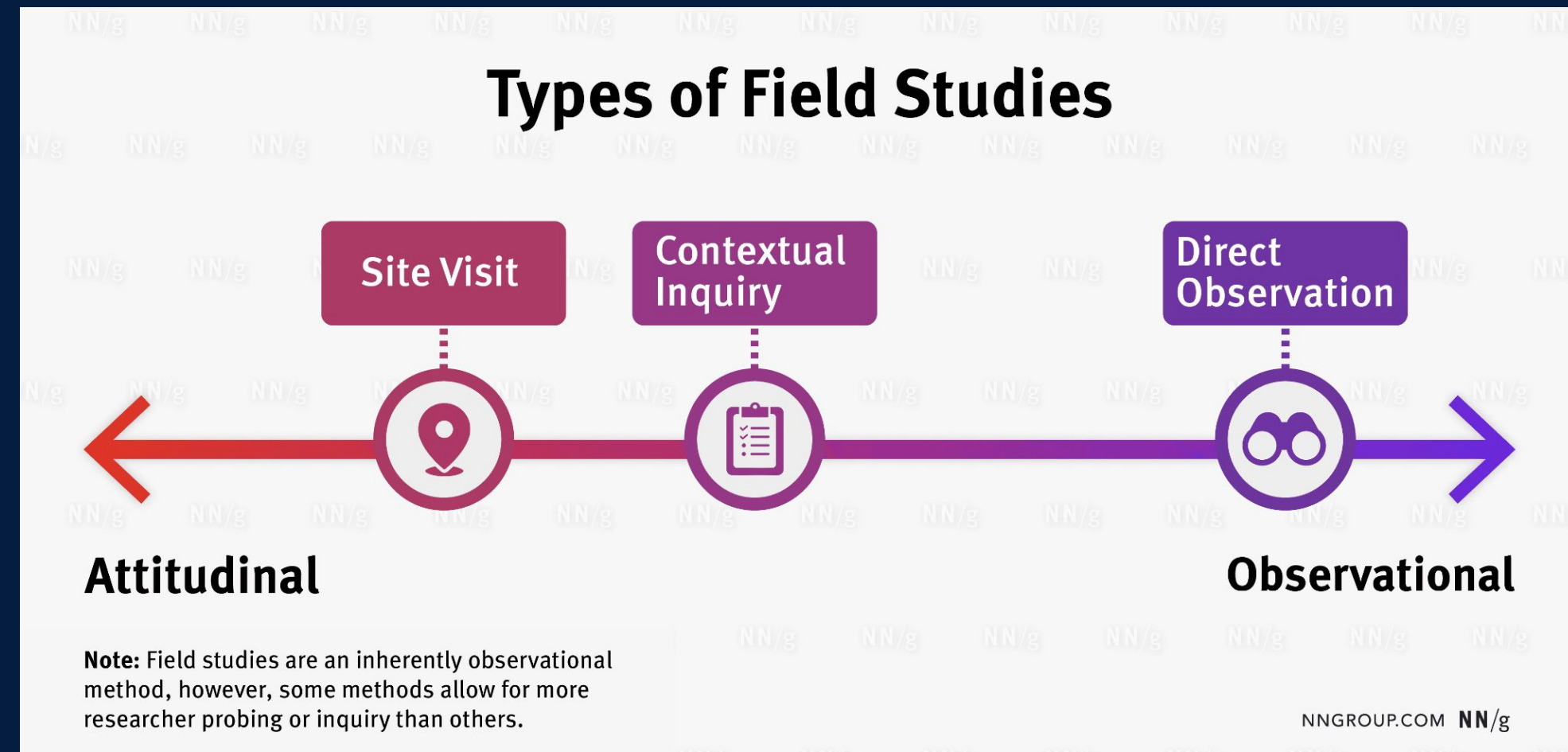
KEY RESEARCH INSIGHTS

User Research

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

KEY RESEARCH INSIGHTS

Market Research

Looked at Various Dashboard & Legal Case Management Platforms

CaseBook

The screenshot displays the CaseBook dashboard interface. At the top, there is a navigation bar with the CaseBook logo, links for 'Our Software', 'Solutions', 'Pricing', 'Contact Us', and 'Blog', and a 'Schedule a Demo' button. Below the navigation bar, there are several feature highlights: 'Built-in & Custom Reports', 'Form Building', 'Service Planning', 'Scheduling & Notifications', 'Workflows & Messaging', and 'Intuitive User Experience'. The main content area is titled 'BUILT-IN & CUSTOM REPORTS' and features a headline: 'Tired of spending hours compiling data and generating reports?'. Below the headline, there is a paragraph of text: 'Say goodbye to manual reporting headaches. With Casebook's built-in and custom reports, human service providers can easily access comprehensive data insights and generate tailored reports in a fraction of the time, empowering them to make data-driven decisions and demonstrate the impact of their services effectively.' The dashboard itself shows a 'Case Summary' section with a table of filters and several data visualizations: 'Total Cases' (833) and 'Total Case People' (1347), 'Cases Closed Period over Period' (a bar chart showing a peak in February), 'Cases by Status' (a pie chart showing 70% Active, 10% On Hold, and 20% Closed), 'Clients by County', 'By Assignee', and 'People with Case Involvements'. A 'By Case Type' table is also visible, listing categories like 'Community services', 'Elderly', 'Energy assistance', 'Disability', 'Mental health', 'Substance abuse', and 'Parenting support' with corresponding counts for 'Cases' and 'People'.

Takeaways

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

Our Integration

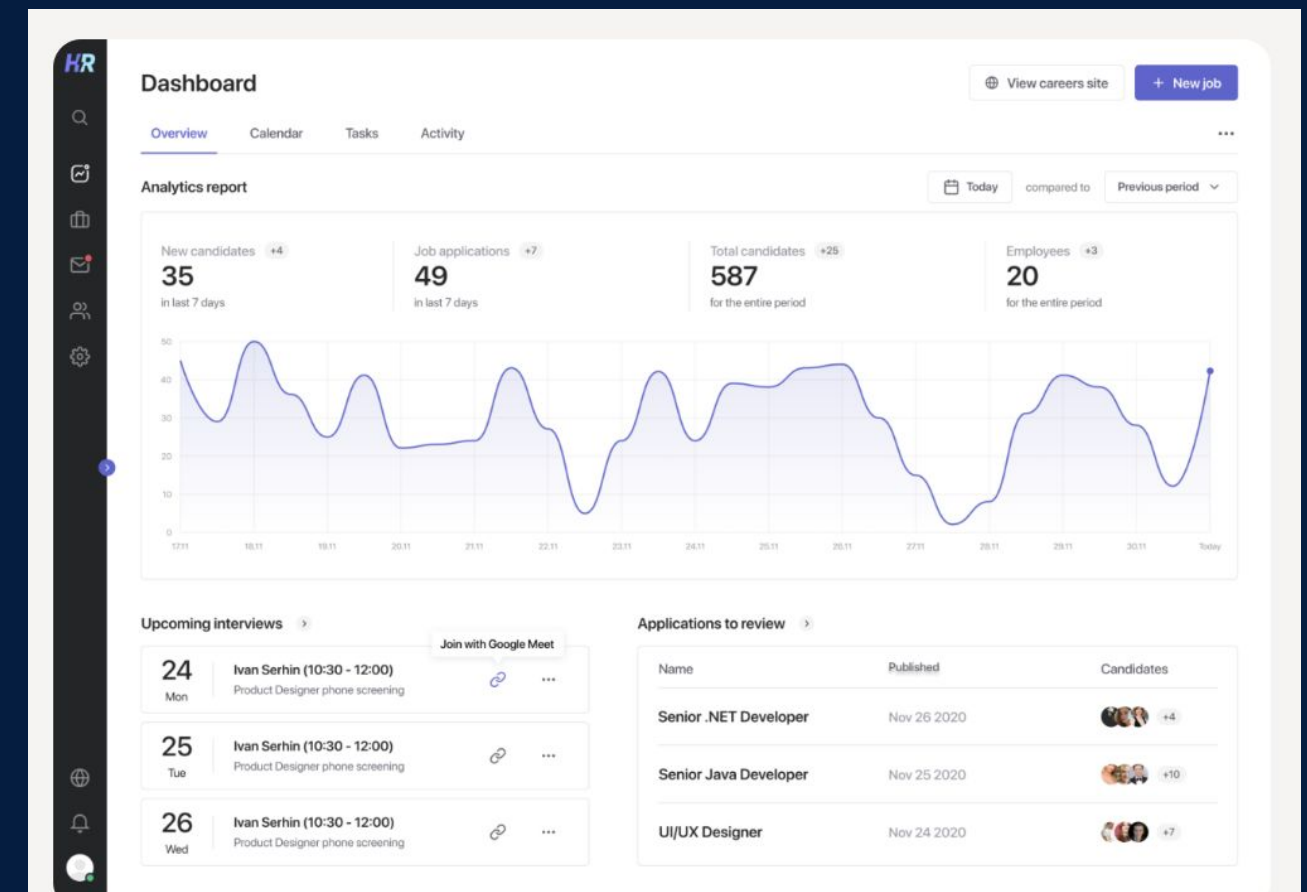
- Understood what kind of reports to create and how to organize data

KEY RESEARCH INSIGHTS

Literature Review Pt.1

“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.

KEY RESEARCH INSIGHTS

Literature Review Pt. 2

“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.

Purpose served	What should be in place	Needed capacities or functions
MANAGEMENT OF CLIENT AND CASE DATA	Case management system (cont'd)	<ul style="list-style-type: none">• Capacity to generate reports and extract meaningful data for strategic planning, program evaluation and other purposes• Ability to assign the appropriate funding source to cases.• 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)

KEY RESEARCH INSIGHTS

Affinity Mapping

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

USER

Sandra Miller

Executive Program Director

Problems and Needs

- Challenges in accessing and utilizing client data effectively for reporting.
- Improve efficiency in reporting and analysis
- Enhance accessibility and scalability of tools



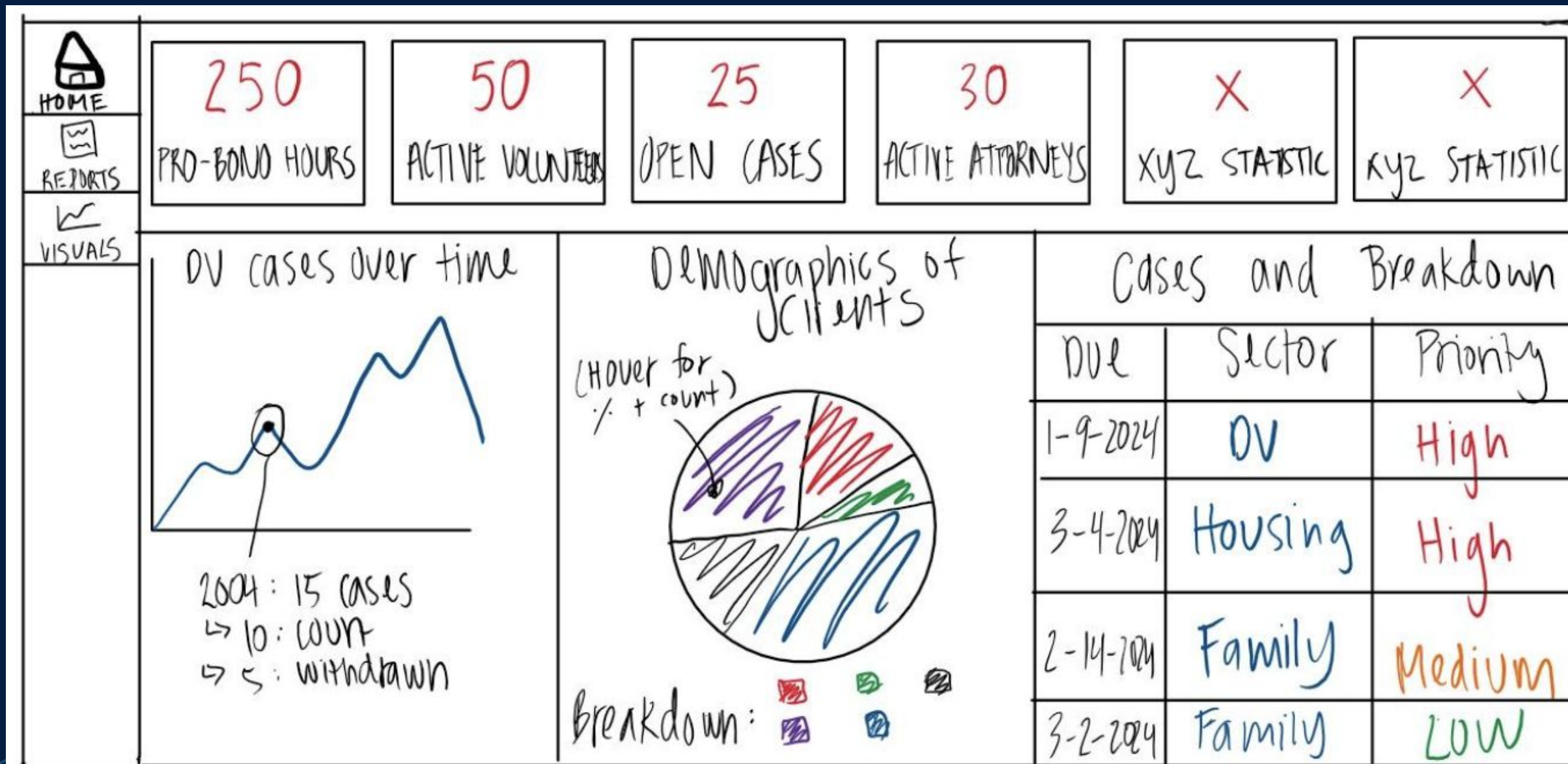
SOLUTION APPROACH



- 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

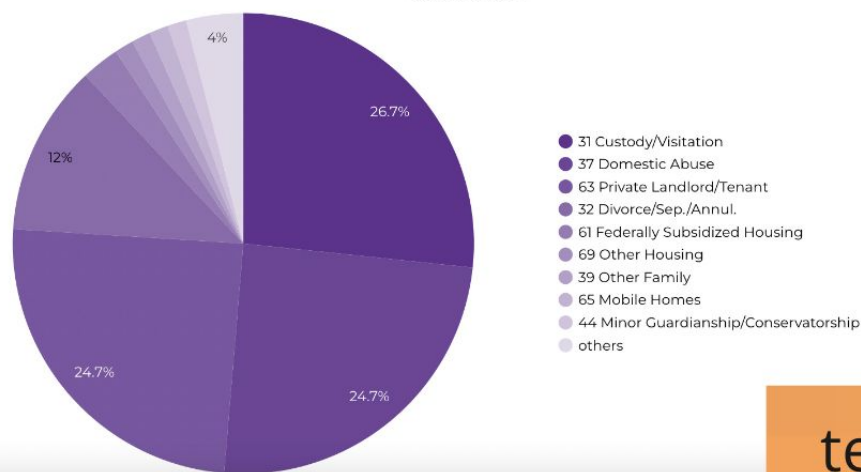


USER TESTING

Who Are Our Clients?

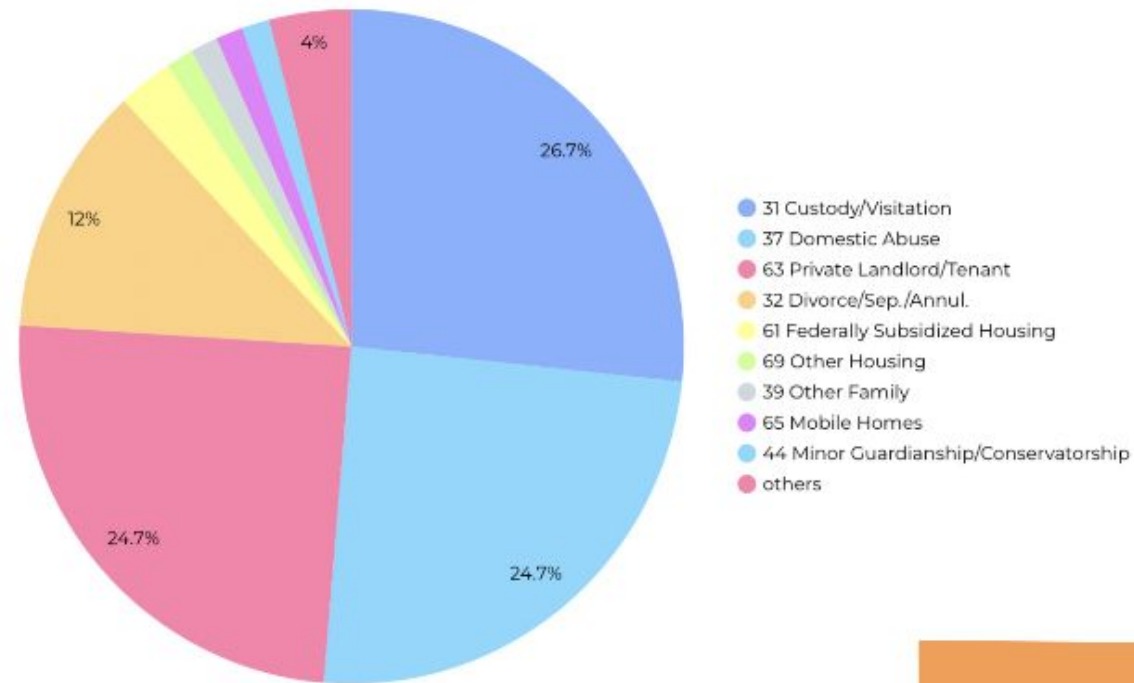
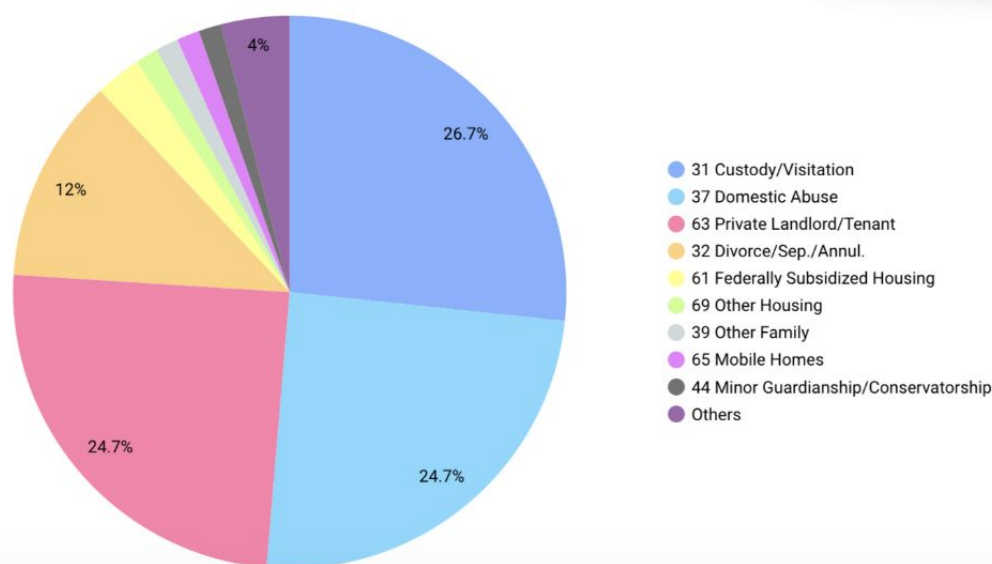
Core Client Statistics 2000-2024	Total Primary Advocates 9	Total Client Records 17,876	Total Races Served 19
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Legal Problem Distribution
2000-2024

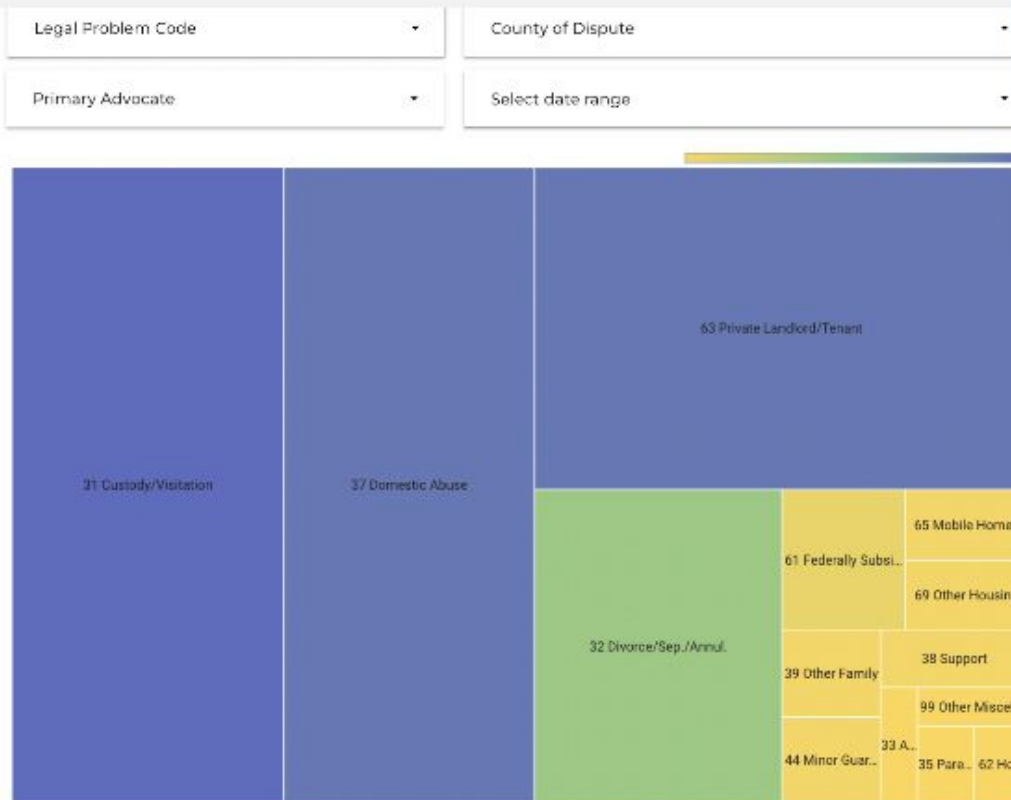


testing various colors

Legal Problem Distribution
2000-2024



testing different methods of visualization



- 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

Who Are Our Clients?

Select date range

Clear Filters

Download Report

Clients At a Glance

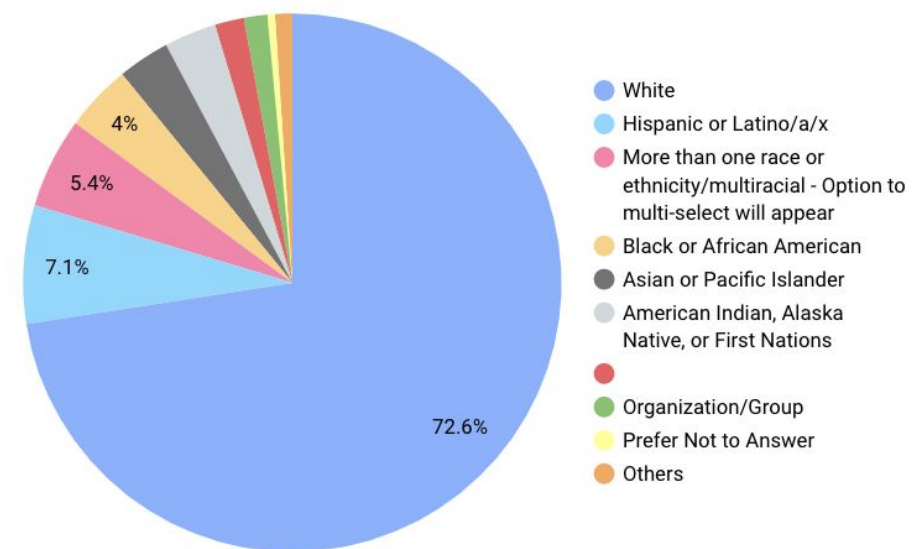
Total Client Records
21,932

Total Open Cases
440

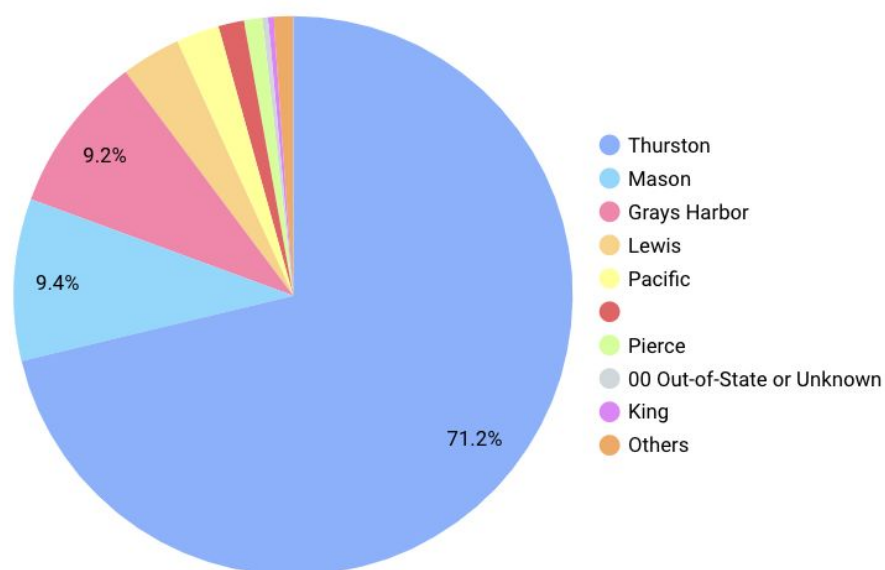
Total Closed Cases
18,888

Total Legal Problem Codes
68

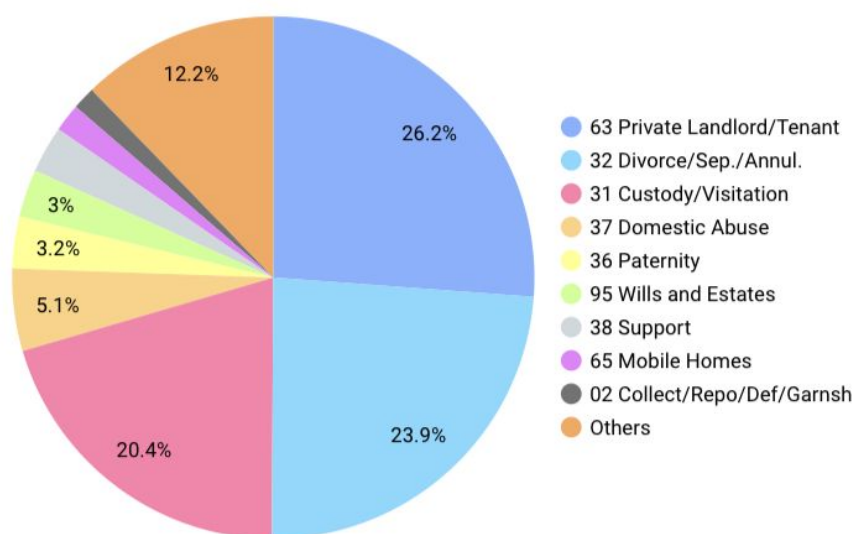
Race Distribution



County Distribution



Legal Problem Distribution

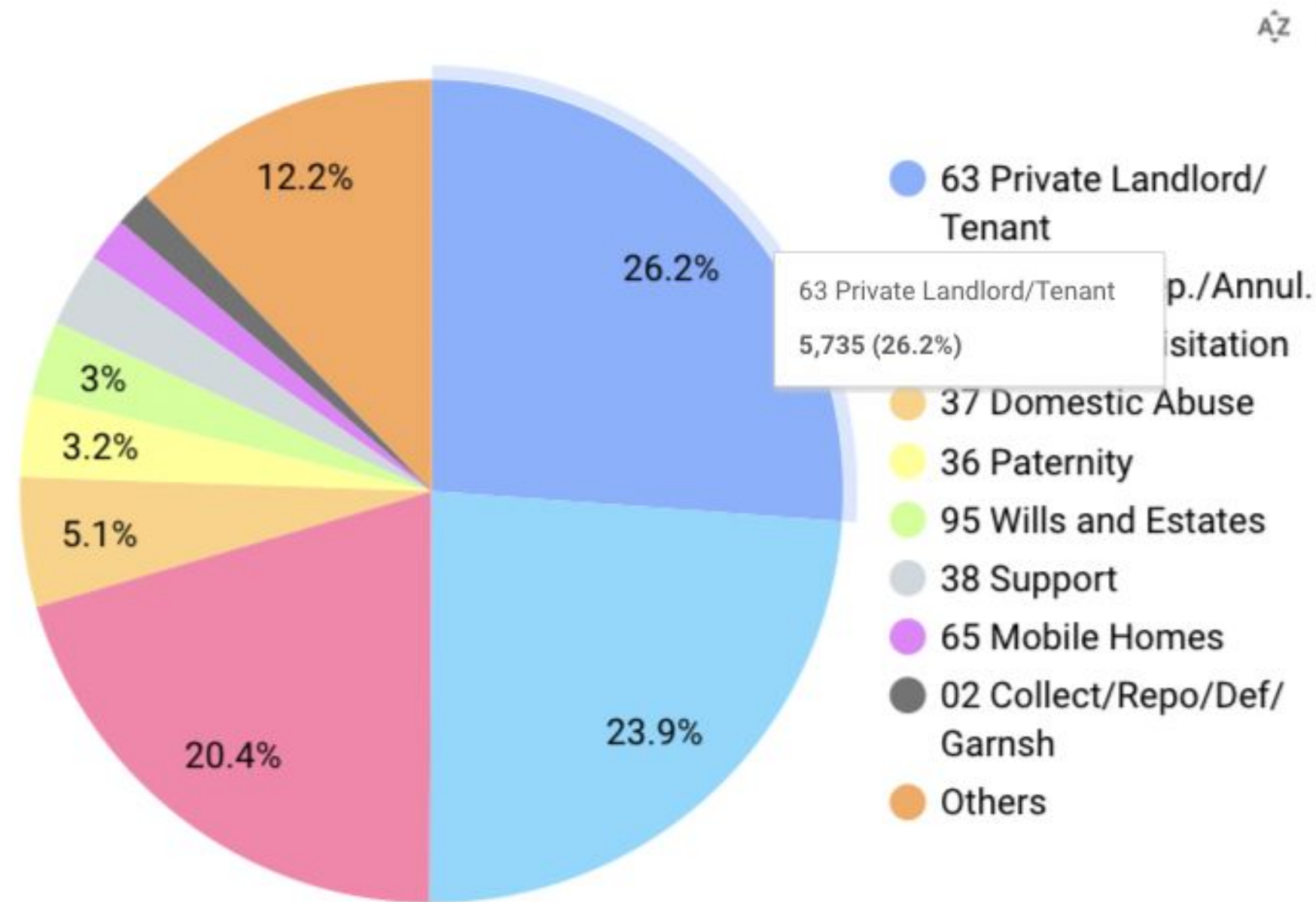


Breakdowns by various data attributes:

- Key visualizations such as breakdown of clients through race, county of origin and legal problem distribution
- Color range for ease of readability

KEY FEATURES

Legal Problem Distribution



Interactive Visualizations: Show count of data in addition to percentage breakdowns with tooltips on hover

KEY FEATURES

Auto date range ▾

Start Date End Date

< May 2024 > < May 2024 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

CANCEL APPLY

Nonbinary/

✓ Legal Problem C... Funding_Cod...

🔍 Type to search Funding_Code_s_

✓ 32 Divorce/Sep./Annul.	2.6M
✓ 63 Private Landlord/Tenant	2.2M
✓ 31 Custody/Visitation	2.2M
✓ 37 Domestic Abuse	479.5K
✓ 36 Paternity	348K
✓ 38 Support	311.5K
✓ 95 Wills and Estates	311K
✓ 02 Collect/Repo/Def/Gar...	149K
✓ 99 Other Miscellaneous	143K
✓ 39 Other Family	134.5K
✓ 65 Mobile Homes	132K
✓ 61 Federally Subsidized H...	98.5K

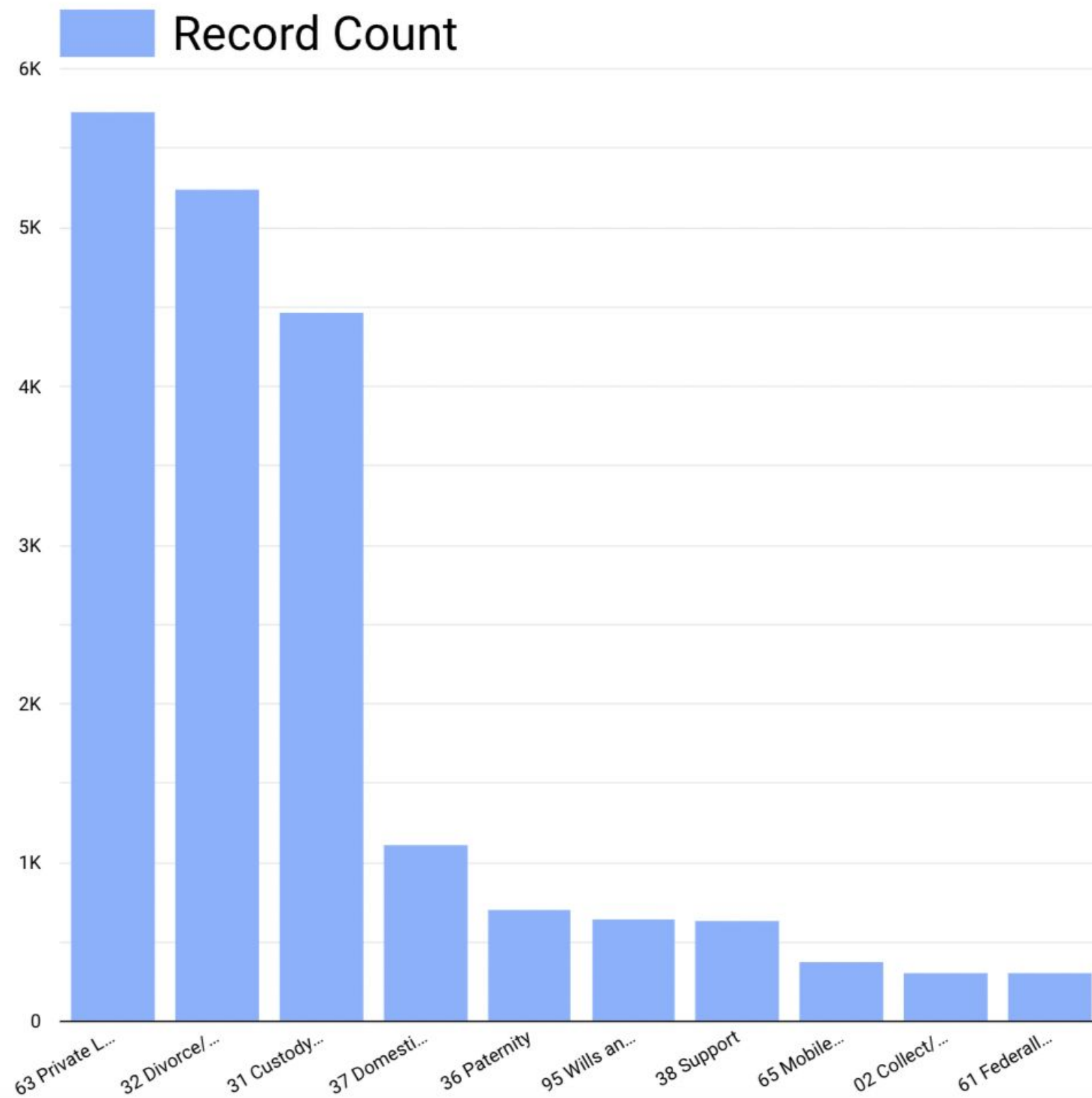
✓ County of Dispute Record

🔍 County of Dispute

- ✓ Thurston
- ✓ Mason
- ✓ Grays Harbor
- ✓ Lewis
- ✓ Pacific
- ✓ null
- ✓ Pierce
- ✓ 00 Out-of-State or Unkno...

Granular Filters:
Date range, legal problem type, and county of dispute for precision to address specific data/research questions

KEY FEATURES



	Legal_Problem_Code	Record Count ▾
1.	63 Private Landlord/Tenant	5,735
2.	32 Divorce/Sep./Annul.	5,240
3.	31 Custody/Visitation	4,467
4.	37 Domestic Abuse	1,117
5.	36 Paternity	703
6.	95 Wills and Estates	647
7.	38 Support	637
8.	65 Mobile Homes	379
9.	02 Collect/Repo/Def/Garnsh	311
10.	61 Federally Subsidized Hou...	305
11.	99 Other Miscellaneous	295
12.	null	283
13.	39 Other Family	281
14.	69 Other Housing	191
15.	03 Contract/Warranties	155
16.	33 Adult Guardianship/Cons...	154
17.	62 Homeownership/Real Pro...	150
18.	67 Mortgage Foreclosures (...)	71
19.	01 Bankruptcy/Debtor Relief	70
20.	29 Other Employment & Ceta	64
21.	09 Other Consumer/Finance	52

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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)

Download as PDF

[Learn more](#)

- Ignore custom background color
- Add a link back to the report
- Password protect report

CANCEL

DOWNLOAD

KEY FEATURES



Responsive:
Responsive Screen
sizing for mobile and
web

Demo Video



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

