MC+A

CASE STUDY

Legal Services of Northern California Findability Project

Legal Services of Northern California Findability Project

Legal Services of Northern California (LSNC) faces many of the same challenging issues that confront businesses and organizations across the globe today. These include but are not limited to:

1. Access to multiple data repositories across the enterprise
2. Document Storage Standardization, or Taxonomy, issues
3. The need for knowledge workers to Quickly Find Relevant Information so as to improve individual and organizational performance
4. Multi-Office Collaboration requirements

Who is Legal Services of Northern California and what is The Findability Project?

Legal Services of Northern California is a non-profit legal organization that assists low-income clients in 23 of the northernmost counties in the State of California. Database searches are an integral part of their enterprise. As time passed, it became apparent that alleviating wasted time and effort in these searches, particularly those that accessed files and documents within their own servers, was a priority.

With a grant received from the LSC Technology Initiative Grant Program, LSNC purchased a Google Search Appliance to address these search concerns. The Findability Project documents the organizational analysis of the Google Search Appliance implementation and the benefits that it now provides LSNC.

The Search Problem

A commonly reported industry figure indicates that, on average, enterprise content data escalates by over 80% per year. LSNC, with its immense repository of legal services documentation, is no exception. Search is a vital component of their effectiveness. The increasing number of associates accessing cases, briefs, and projects drove their information storage needs through the roof.

Location was also an important factor within Legal Services of Northern California. Within 8 branches scattered throughout the region, a local file server was utilized. In addition to these local servers, LSNC utilized an organization-wide file server known as the Pika Case Management System. Each system operates with multiple repositories so that collaboration between branches and associates becomes easier. A majority of LSNC's data rests within the Pika Case Management System housed in Sacramento. Finding the right information and having the right search tool was

essential. Using the native search capabilities of the different file management systems could prove effective individually, but the overall performance and speed of the system was less than efficient. As with many knowledge-intensive organizations, LSNC views effective search as a mission requirement, both critical and non-negotiable.

The Case for the GSA

Right out of the box the Google Search Appliance (GSA) performed searches for critical information behind LSNC's firewall – to the delight of their IT team. However, the data needs were soon maxing out the Google Search Appliance document limit. It became necessary for searches to be more accurately focused. The next step in their search implementation journey required the LSNC project team to examine how employees stored and organized information.

They began with a sampling of three employees who utilized very different organizational techniques. The first individual had an inefficient hard-copy filing system with paperwork scattered haphazardly across the office. Electronically, on the local file server, this associate had one folder containing all of the documentation, i.e. 595 MB in 2,623 document files. Business intelligence organizations would label this organizational structure "narrow and deep" data storage.

The second associate was at the other extreme of the organization continuum. He had a total of 3,616 work files tightly packed and totaling over 3 GB in 671 folders and subfolders. Some of these subfolders were up to 5 folders deep.

By contrast, the third associate organized her files by case, project, or substantive area which could be easily understood by any user.

With this organizational information in hand, the project team set out to maximize the effectiveness of their Google Search Appliance (GSA).

Getting it Right: Metadata and Taxonomy

As a result of the widely varying storage methodologies used by each of the three associates sampled, not to mention the potential for hundreds of variations used by other employees, a standardized taxonomy had to be developed. A significant portion of LSNC's metadata models relied on organizational structures to build logical and searchable "collections". The taxonomy process was completed after consultation with MC+A's team experts. Recommendations were implemented based

on the manner in which the GSA recognizes particular taxonomies.

This means that the taxonomy and organization were based on four precepts:

1. The directory structures need to be a hierarchical or "top-down" organization of simplified, familiar categories;
2. Names for content folders, subfolders, or categories need to be consistent with the shared vocabulary within the organization;
3. It is necessary to lean toward a broad-and-shallow rather than narrow-and-deep hierarchy; and
4. It's not all about taxonomy.

From these standardized thought processes, the project team put together 29 top-level directories to be searched and only one level deeper for specific directories. Hence, they adapted the broad-and-shallow organizational system.

The Survey

The next step in defining the ultimate feel of the project was putting together a rough-cut survey for the end result. To do this, individuals at The Findability Project utilized the resources within their Sacramento location. Of the 31 individuals within the office, a modest 17 started the survey; however, only 11 completed it. Overall, 55% (17/31) participated in the survey and 35% completed it (11/31). This equates to a 65% completion rate (11/17).

The answers given to each of the questions from the 11 employees who completed the survey (and the answers from the incomplete surveys) gave the researchers a better understanding of the individual search needs and organizational techniques being used.

From the small user sampling, the following questions and answers were given provided:

1. Did you know how to locate the TFP Portal?
   86% knew how to locate the TFP search portal; 14% did not

2. What was your reaction to the elements on the temporary search portal page?
   33% said organized; 42% said well-organized; 17% said superbly organized

3. Were you confident that you understood the elements on the search portal and why they are there?

92% said they understood what the elements on the search page were and why they were there

4. What would you add to the search portal?

One person made the suggestion, "Can you add something so I can sort by file type?"

5. Do you know where the local server files reside? Program-wide server files?

100% said they could locate the local file server directories; 11 of 12 said they could locate the program-wide file server directories

6. Can you locate your personal user directory? Other users on the local shared file server?

100% knew how to locate their personal user directory

7. How well do you understand how the directory structures are organized?

50% said it made sense how the file directories were structured; 17% said it made sense but would do it a little differently; 25% said it made perfect sense

8. Are you familiar with searching on Google?

83% said yes they were familiar with searching on Google; 17% said "are you serious?"

9. Is the TFP search portal similar or dissimilar to using Google on the web?

Of the 11 who answered, two said it was "nothing like Google"; 56% said "way Googley"; 9% said it was "exactly like Google"

10. Were your searches successful?

9% said the search was "not successful"; 18% said "partially successful"; 37% said "successful"; 18% said "very successful"; and 18% said they were "dead-on successful"; this totaled a 73% success rate

11. Did you understand the search results?

9% said they did not understand the results at all; 18% said they "only partially understood"; 9% said "do understand the results"; 55% said "have a very good understanding"; and 9% had "absolute understanding"; again a 73% understanding rate

The goal of the survey was to acquire a small sampling of individuals who currently utilized the server files and find out their impressions of the system that would be implemented. The results of the surveys would be used as a tool when implementing the actual system. Input from the end-users was a very important step for the process from the project creators' standpoint.

How They Did It

After gathering the necessary information when it comes to end-user interface with the new system, the next step was setting up the environment for the roll out. To do this The Findability Project team had to implement system requirements for the enterprise-wide collaboration effort. Here is what they utilized:

- Windows Server 2003
- ASUS PM52-M Certified Motherboard – this was to meet system requirements
- Microsoft Office SharePoint Server (MOSS) 2007
- Google SharePoint Connector – Active Directory authenticated to give the GSA permissions to crawl domain content
- Google Search Appliance
- Microsoft Office 2003
- Microsoft Internet Explorer 6.0 or later
- Microsoft ISA (Internet Security & Acceleration) Server 2006

To ensure the sought-after results each of these system requirements allowed for both file sharing and proper integration of the Google Search Appliance. The Findability Project set out to build an enterprise search platform, where the GSA could be used to search all the data within this platform. Legal Services of Northern California was looking to streamline its collaboration efforts and allow each associate the ability to find the information with lightning-fast speed and, of course, accuracy.

The Solution

Essentially, The Findability Project started with the solution (Google Search Appliance) and worked backwards from there. What was the appliance going to target, and how would it react to the amount of data stored within the organization? As outlined earlier, the test right out of the box confirmed that the GSA was the appropriate enterprise search solution. "Team Gizmos" (the self-titled TFP team) had to then establish precisely what they wanted the "big yellow box" to do. Thus they created four abstract targets for the GSA:

1. Designated document repository master directory structures
2. Shared intranet content
3. Select LSNC public web content
4. Pika Case Management System

Designated Document Repository Master Directory Structures

A designated document repository refers to a basic, workable "taxonomy" for organizing files. This means that both existing (past) and new (future) content that has been identified as valued will reside on project-specific file servers that have been purposefully organized in the directory structures. Doing so allows the structures that have been worked out (Getting it Right: Metadata and Taxonomy) to serve the overarching goal of "findability."

Shared Intranet Content

LSNC refers to their intranet as the "secure network". According to LSNC, most legal services programs have some type of intranet structure already in place, with varied user-side implementations to give staff access to its content. By definition, everything that was currently on the intranet was valued. The information that was stored on the intranet and organized included:

1. Administrative manual
2. Case management manual
3. Development and fund-raising resources
4. LSC (Legal Services of California) policy archive
5. LSNC forms (administrative and case-related)
6. LSNC policy archive
7. MCLE – Training resources and forms
8. Personnel and other shared human resources information
9. Specialized Regional Counsel consent (content subject to gatekeeper function)
10. Specialized client content (content targeted for LawHelp access)

Select LSNC Public Web Content

LSNC has reaped benefits from a decade-long public web presence which has created and shared usable content for advocates. They have targeted their rich advocate content reservoir on CalWorks (California's TANF program) and Food Stamps, and special project-specific content that derives from their Race Equity Project as well as their housing and development work. They are utilizing the GSA

to provide search capabilities not only behind the firewall but also to their public content.

Pika Case Management System

Most of the GSA file limit (aka "license capacity") was devoted to this particular content management system. This was done to dramatically alter how LSNC staff search and locate data within Pika. The challenge with Pika was the best practice for sorting out how best to limit the GSA crawl to target precisely what they really wanted to be searchable, without going over their GSA file limit. They were interested in replacing the search functions in Pika (which are a raw SQL search function) with a customized subset of GSA functions.

Solutions: Working Toward a Common Goal

Though the solution was recognized early (i.e. the GSA), the goal of the project was ultimately more encompassing. Another underlying goal of the project was to recognize and promote among their staff the changes in how documents and other files can be organized in a more intuitive and "findable" manner. The GSA solution provided the right catalyst for a new level of access and usability throughout the non-profit organization. A key element of the project was to change the deeply rooted individual notions or assumptions about what can or should be "shareable."

In this project for the non-profit environment, a learned aspect was the inclination of associates to under-share, rather than over-share. The reason for this is not because they are selfish or secretive, but rather that the type of transparent sharing that enterprise search provides for them is a new concept. Thus, "shareability" promotes "findability."

The Results

While the project is ongoing, The Findability Project has reached some convincing conclusions. To be sure, LSNC is extremely excited about the GSA which provides them with excellent enterprise search capabilities. The expressed excitement for the Google Search Appliance right out of the box is a testament to the immediate and impressive results the GSA provided.

MC+A, who provided both the hardware and consulting for The Findability Project, assisted LSNC in achieving a successful project outcome from day one. The Google Search Appliance has resulted not only in an increase in the "findability" of local and enterprise-wide content, but has also brought the organization into a new, and more useful, understanding of "findability" overall.

MC+A's deep experience and expertise enabled LSNC and The Findability Project to accomplish much more than basic enterprise search functionality. Their partnership has brought an entirely new level of collaboration and organizational intelligence that was never before possible. The goal for this project, as in all projects for which MC+A engages, is not merely to "implement technology," but rather to utilize technology to achieve "organizational transformation" that leads to significant improvements in productivity, profits, and overall performance.

MC+A
CONNECTING BUSINESS INTELLIGENCE

3717 N Ravenswood Ave.
Suite 210
Chicago, IL 60613

www.mcplusa.com

866.761.8108
sales@mcplusa.com

Our Partners:

ENTERPRISE PARTNER Google

connectbeam

Microsoft

Workshare