

## Case Study— Practice Management

### Los Angeles Unified School District (LAUSD)

#### OVERVIEW

**Customer Profile:** Don Davis, J.D., is general counsel for the San Francisco Unified School District, which serves 55,000 students. His experience includes 30 years with the Marine Corps Judge Advocate Division—practicing law all over the world and 10 years as chief of staff in the Office of General Counsel for the Los Angeles Unified School District. His areas of focus include education law, litigation, transactional law and law office management.

**Business Situation:** Davis is using his practice management experience in Los Angeles to increase efficiency for the school district in San Francisco.

**Solution:** Davis and the team in Los Angeles implemented Time Matters® software across a rapidly growing practice and then integrated with LawToolBox® for easier docket management. The plan is to take a similar approach in San Francisco.

#### Benefits:

- Stronger collaboration and estimated 20 to 25 percent time savings with quicker, centralized access to all data, documents and calendars, plus ToDo/assignment tools
- Reduced malpractice risk with better docket management
- The ability to effectively capture billable hours for an entire department (94,000 attorney hours in 2011)

#### Product Summary:

- Award-winning LexisNexis® Time Matters® practice management software helps law firms and legal departments streamline operations and improve efficiency no matter where professionals are working.
- Patented LawToolBox integrated online deadline management calculators are built by attorneys to meet the needs of law practices across the country.
- Add-on Integrated Deadlines software synchronizes deadlines from LawToolBox to Time Matters.

General Counsel improves efficiency  
by an estimated 20% and reduces risk with  
Time Matters® software.

Don Davis, J.D., knows how to bring practice management success to new levels—and new places. After starting recently as general counsel for the San Francisco Unified School District (SFUSD), Davis is focused on supporting the district's strategic plan while also protecting its legal, ethical and financial stability. At the same time, he plans to increase efficiency within the Legal Department.

With that last goal in mind, Davis looks forward to rolling out Time Matters® practice management software across the department this year. He plans to customize it for San Francisco while drawing on 10 previous years of success with Time Matters software in the larger Los Angeles Unified School District (LAUSD), as well as prior experience with Time Matters software in the Judge Advocate Division of the Marine Corps. In this case study, we will focus on results achieved and insights gained in Los Angeles from 2001 through 2011.

### Business Situation

When Davis started at LAUSD, the district's legal office had just selected Time Matters software to help track and improve operations. As team leader, Davis was one of eight attorneys. Over the next year and a half, he supervised the hiring of 32 attorneys and nearly 50 support professionals as the office moved the majority of its litigation in-house. Soon Davis was made chief of staff, and in time he became deputy general counsel.

From the start, Davis oversaw office-wide implementation of Time Matters software for document and matter management, calendaring, docketing, ToDo's, timekeeping and more. LAUSD quickly began customizing the software. Says Davis, "We started customizing before we knew how the software worked optimally, what we needed and what we didn't need." In time, the information flow was no longer intuitive. Davis worked with Roy Allen, certified independent consultant (CIC) with Lawtopia®, to redesign the flow.

"After that, people could quickly appreciate the power and usefulness of the program," says Davis. "Time Matters creates efficiencies by helping to standardize office workflow. It creates electronic repositories of critical data, including documents, which you can reach out and touch at any time. You don't have to go to a filing cabinet. You don't even have to be in the office."

With these advantages, adoption was going well, but a significant need persisted: An easier approach to tracking litigation deadlines with the variety of docketing rules in California.



**Don Davis**  
General Counsel  
San Francisco Unified School  
District (SFUSD)

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## Managing Multiple Sets of Docketing Rules

The four legal teams at LAUSD used several different calendaring processes and software tools. Some attorneys used CompuLaw® software (based on court rules) along with Microsoft® Outlook®, while others used the Time Matters docketing calculation system. LAUSD was involved in federal and superior court activity, plus administrative hearings related to the California Education Code involving a customized set of rules.

Says Davis, “Time Matters is very powerful for calculating due dates based on the court rules that paralegals enter, but I wanted something where someone else would enter the rules and all the dates would be placed in calendars or events that I could view a week or month in advance.”

On the advice of a Time Matters trainer, Davis connected with Carol-Lynn Grow at LawToolBox to discuss objectives, product capabilities and courts to include. Says Davis, “LawToolBox worked very collaboratively with us to adapt its deadline calculator to our practice.”

## Solution

LAUSD uses Time Matters software for all cases. Davis explains, “When a case comes in, we open a matter, assign a number, scan the case, and enter all the data on parties, etc. That becomes a repository and central focus point for everything else that happens in the case, including any deadline calculations made using LawToolBox.”

### Document and Matter Management

To keep documents organized, consistent and accessible while reducing the risk of errors, LAUSD uses customized screens and an automatic file naming convention with a unique document number.

Says Davis, “We developed Time Matters templates in the document creation screen for pleadings, letters, memos, etc. This was better than using an old document to create the new one and possibly keeping old content in the new file.”

In time, the office set up another customization that required attorneys to save their Microsoft® Word® files to Time Matters software so that everything would be available centrally.

### Calendars, ToDo’s and Timekeeping

To help colleagues coordinate plans and stay on top of key dates, Time Matters software gave all professionals in the office access to everyone’s calendar and also synchronized with Outlook.

In addition, Davis used the Time Matters ToDo feature extensively. He explains, “When using Time Matters email, I could easily capture the message in the comment section of a ToDo template and assign tasks. An instant message would go to the assigned person.”

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All the attorneys and paralegals used Time Matters software for timekeeping. In fiscal year 2011, says Davis, the team booked about 94,000 attorney hours in Time Matters software.

#### **Integration with LawToolBox for rules-based calendaring**

LawToolBox combines off-the-shelf court rule sets with custom in-house rule sets for centralized docketing. Once a paralegal enters a complaint or trial date, LawToolBox determines the applicable deadlines. Deadlines synchronize from LawToolBox to Time Matters using Integrated Deadlines synchronization software.

For example, in the LawToolBox calculator for Los Angeles County Superior Court, paralegals can enter any one of over 30 trigger dates, which in turn automatically calculate between 1 and 18 deadlines.

Deadline calculations are updated in LawToolBox online in real time when rules change. When rule changes apply to pending matters already docketed in LawToolBox, deadlines are updated and also preserved under the “old rules” for reference.

#### **Caseload Management**

It’s easy to generate deadline-related reports for the entire department. For example, says Davis, “If I want to look at trials coming up in the next two weeks, I can easily filter the information to view just those dates.” He adds, “No two lawyers work the same way, so to achieve consistency across the practice, Time Matters and LawToolBox are critical.”

#### **Meeting Deadlines**

LawToolBox delivers email reminders of upcoming deadlines. In addition, each deadline is automatically docketed to: (a) each user’s Time Matters calendar, (b) each user’s Outlook calendar, (c) weekly deadline summary emails and (d) management reports.

### **Benefits**

#### **Manage Cost and Risk**

Davis notes, “We needed a consistent, well-organized, responsive product, and that’s what Time Matters software is. Per-user cost is minimal, and same with LawToolBox. They designed a firm-wide cost structure for us and made it affordable.”

In addition, failure to know or be reminded of a deadline is a cause of legal malpractice. When a firm signs up for LawToolBox, malpractice discounts often more than offset the cost of using the service.

#### **Save Time**

Davis estimates the department in San Francisco will gain 20 to 25 percent time savings by accessing legal data and documents through Time Matters software—similar to the time savings experienced in Los Angeles.

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He explains, “From the general counsel’s standpoint, Time Matters provides a comprehensive resource. When I need to know what new matters were opened in the past week, I don’t have to ask anybody or wait for an attorney to return to the office or for a file to be pulled. I just do a quick search on matters created or closed in the last seven days. It’s easy to reach out and access the information I need right away to be an effective general counsel.”

In the area of docketing, time savings are also significant. Says Davis, “By adding LawToolBox to Time Matters, we saved hours of paralegal time previously spent calculating and entering deadlines by hand.”

### Next Steps

Davis expects to have Time Matters software and LawToolBox in place in San Francisco by midyear. Although San Francisco has fewer attorneys and a smaller caseload than Los Angeles, the combined matter, document and docket management features are expected to improve efficiency whether attorneys are in the office or on the road.

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### About LawToolBox

LawToolBox was the first online rule-based court deadline calculator in the United States. The company first started offering patented deadline calculators online in the late 1990s. A significant measure of quality provided by LawToolBox is a client retention rate of nearly 95 percent.

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