



Portland City Attorney's Office Uses Legal Hold Pro to Stay Ahead of Litigation and Reduce Risk

Portland, Oregon, has a reputation for being progressive, namely as a leader in land-use planning and "green" building. In late 2009, the Portland City Attorney's Office continued that innovative approach when they streamlined their litigation workflow by implementing Legal Hold Pro.

Portland City Attorney Stats

Portland City Attorney: Linda Meng

Size of City Attorney's Staff: 66

City Population: 582,130 (2010 – ranked 29th in US)

No. of City Employees: 5,757 (FY2010-11)

Total City Budget: \$3.43B (FY2010-11)

The Office of the City Attorney has a staff of more than 50, including 34 attorneys and more than 21 paralegals and legal assistants. The City Attorney's Office handles all litigation involving the city and its nearly 6,000 employees.

This broad scope of responsibility leads to a high number of legal holds being issued regularly and requires a thorough process for management and compliance. The Legal Hold Pro system is used jointly by the staff of the City Attorney's Office and

Portland's Risk Management Division to improve compliance and tracking of litigation preservation notices.

Since deploying Legal Hold Pro, the system has proven to be an easy, useful, time saving, and secure way for them to implement litigation holds. Legal Hold Pro is now part of the Office's standard procedures on all new cases.

"Legal Hold Pro has helped our office better manage our high volume of legal holds while reducing our expenses through improved efficiency. We believe it is enabling our attorneys, risk managers and records managers to collaborate and ultimately lowers our risk," said City Attorney Linda Meng.

We recently sat down for a conversation with Glenn Fullilove, Senior Paralegal in the City Attorney's Office, and Becky Chiao, Senior Claims Analyst in the Risk Management Division, to learn more about their experiences with Legal Hold Pro.

How was the transition from the old, manual process of issuing litigation holds to using a software system?

We found it incredibly smooth to make this transition. As we used it more we realized how much of a benefit it was to issue and keep track of litigation holds electronically versus the old-fashioned hard copy method.

Once we went through our initial training and began using the software we realized there were many benefits to using Legal Hold Pro. We are far less worried that holds might be getting lost on desks underneath piles of paper.

Records are readily accessible on the computer to track who we sent holds to and we could see if the holds had been looked at and responded to. We also received automatic reminders when it was time to reissue a hold. It's a great tool to help hold everyone accountable.

Has Legal Hold Pro helped your office save time and lower costs?

Failure to retain documents related to a case could definitely cost the city money through court ordered sanctions. Legal Hold Pro improves our efficiency in issuing and managing notices. Using it saves paper and frees up time to work on other things. We get notices out to people quicker and receive responses faster, there isn't as much time wondering if the hold was received, and subsequently, less time is spent on the phone checking on status. And we're reducing the risk of inadvertent spoliation by keeping our custodians better informed.

Have you noticed improvements in custodian response times?

This is much quicker. We used to send out a hold and wonder if it was ever received or was lost on a desk. Days would go by and we'd need to follow up with a phone call. Now, we can look at a hold on the computer and see everyone who has responded and what their response was.

Not only is response time quicker, when we need to reissue a hold it can be done on the computer very easily. When a custodian is no longer needed we can release them with a click of a button, or if the issue is totally resolved we can release everyone associated with the hold at once.

Have you benefited from having a complete audit trail in one place?

Definitely. All of the names and contact information are here in one place and it's easy to look up who is on a claim. We can keep a record of any notes or communication that have occurred around the hold. We can see who received the notice and who acknowledged it. We can send out updates when we get requests for production, we can reissue and release. It's a place that is built in to the hold that we look at, use and monitor.

Have you had any concerns with confidentiality and security?

We have not had any privacy or security issues with Legal Hold Pro. This is always a concern to anyone dealing with sensitive matters. We are comfortable with that aspect of the tool.

Legal Hold Pro does what it is supposed to do and it does the job well. At this point, we are positively happy with it.

**Visit www.legalholdpro.com or call 888.376.0666
for more information!**