

**Senior Statewide Legal Hotlines  
Client Outcomes Survey, 2000**

**A Survey of Clients at Senior Legal Hotlines in  
Florida, Michigan, Kentucky, Tennessee,  
and Washington**

**Narrative Report Produced by the AARP Foundation  
Technical Support for Legal Hotlines Project  
Numerical Results Tabulated by  
The Center for Policy Research**

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## ***Introduction***

The Statewide Senior Legal Hotline model was originated by AARP in 1985. Various surveys were performed in the mid-90's to determine client satisfaction with the service and were substantially favorable<sup>1</sup>. The Senior Hotlines Outcomes Survey 2000 represents an effort to determine what impact the hotline advice has on the client's question or problem. The primary goals of the survey were to determine:

- Services for which clients called the hotline
- Whether clients followed the hotline advocate's advice
- Results clients obtained

Secondary goals of the survey were:

- Gathering information on client satisfaction with the hotline services
- Seeking a correlation, if any, between the case type of the call and the outcome
- Collecting client demographic data

This report presents the findings from the survey of the Senior Hotlines in five states. The report outlines the methodology of the study, presents the results of the survey and ends with a summary and recommendations. The results reported begin with a description of client demographics. The second section reports results based on the clients' responses to questions about their initial contact with the hotline. Following that section, the report focuses on the information and advice the caller received from the hotline and also reports the respondents' perception of the helpfulness of the hotline. The report then looks at the types of advice the caller received and reports whether or not the callers took any action based on the advice they were given. The report ends by detailing outcomes of the callers broken down by problem type and then offers some recommendations based on the findings from the survey.

A concurrent effort by the Project for the Future of Equal Justice to measure client outcomes is currently under way among clients of hotlines serving the low-income population.

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<sup>1</sup> See 1994 and 1992 Legal Hotlines Client Satisfaction Surveys, the results of surveys sent to clients of the Washington D.C., Florida, Maine, Michigan, Ohio, Pennsylvania and Texas statewide senior legal hotlines. The surveys were conducted by Evaluation Research Services. Available in hard copy from the National Center on Poverty Law, <http://www.povertylaw.org/hotline/hotline2A.htm>  
Clearinghouse Number: 51,857; 51,858.

## **Methodology**

The AARP Foundation Legal Hotline Technical Assistance Project enlisted the participation of five senior legal hotlines: The Legal Hotline for Michigan Seniors, the Legal Hotline for Older Floridians, the Legal HelpLine for Older Kentuckians, the Tennessee Elder Law Line, and CLEAR\*Sr serving the state of Washington. The Project, with the participation of the five hotline managers and a consultant from the Center for Policy Research designed a client survey instrument (Appendix). A translator at the Legal Hotline for Older Floridians produced the Spanish version. Each of the hotlines sent the surveys out to every client they served, up to a maximum of 1,200 surveys, (with the exception of clients who might be endangered by receipt of the survey) during the period from February-August 1, 2000. A total of 3,486 surveys were sent out by the five hotlines and 1,042 were returned to AARP Foundation. This represents a response rate of 30%. The surveys were then sent to the Center for Policy Research in Denver, Colorado for entry on a computer and statistical analysis.

Several of the questions allowed clients to enter a descriptive comment in addition to selecting a fixed choice response. This was done to provide additional input to hotlines. The Center for Policy Research did not analyze any narrative data supplied by clients. Only client responses to close-ended questions on the survey instrument were tabulated. A sampling of client comments are included in this report.

## **Results**

The higher volume hotlines naturally sent out more surveys and their clients represent a greater percentage of the total. Of the 1,043 clients who responded to the survey, 42% were from Michigan, 25% were from Washington, 13% were from Kentucky, 12% were from Tennessee, and 9% were from Florida. Although Florida has over 3 million residents over the age of 60, the Legal Hotline for Older Floridians has had to greatly reduce the number of people it serves due to funding constraints. It now serves Miami-Dade and Monroe (Florida Keys) county seniors and statewide seniors who speak only Spanish and Creole. Approximately 60% of its clients speak only Spanish, and 33% of the 89 returned Florida surveys were in Spanish.

Number and Percentage of Responses from Each Hotline

Hotline	Number of Responses	Percentage of Total
Michigan	434	41.6%
Florida	89	8.5%
Kentucky	137	13.1%
Tennessee	120	11.5%
Washington	263	25.2%
Total	1,043	100.0%

## A. DEMOGRAPHIC DATA

At a response rate of 30%, the demographic statistics are not necessarily indicative of the demographic makeup of the total number of hotline clients. To the extent demographic status impacts clients' outcomes, this report can draw conclusions only for those 30% of clients who responded to the survey.

### **Gender:**

Clients were asked to provide demographic information about themselves. The gender of the respondents is greatly skewed in favor of females. Over 70% of the respondents were female and 29% were male. Twenty respondents, 2%, did not indicate their gender. The percentage of male vs. female respondents was quite consistent across all hotlines and showed less variation than just about any other variable in the study.

Table 1: Gender of Respondents: (Raw numbers are enclosed in parentheses)

<b>Gender</b>	<b>MI</b>	<b>FL</b>	<b>KY</b>	<b>TN</b>	<b>WA</b>	<b>Total</b>
Male	30% (126)	31% (27)	26% (35)	28% (33)	30% (78)	29% (299)
Female	70% (297)	69% (59)	74% (98)	72% (85)	70% (183)	71% (722)
Total	100% (423)	100% (86)	100% (133)	100% (118)	100% (261)	100% (1,021)

### **Age:**

Although the senior hotlines serve clients 60 and over, 8% of the respondents were under 60. For four of the hotlines the percentage of respondents under age 60 was less than 4%. An anomaly occurred in Kentucky's results. There, 40% of respondents indicated they were under 60. A discussion with that hotline revealed that many of their callers are helping older relatives. A review of the Kentucky surveys shows that 13 of the 55 respondents who said they were under 60 noted that they had called for a relative. Calls on behalf of older relatives are common at all the senior hotlines although only the Kentucky surveys reflects such a large percentage of under-60 callers.

The vast majority of respondents (79%) were between 60-80 years of age. There were 444

(43%) respondents between the ages of 60-70, and 376 (36%) between 71-80. Respondents between 81-90 years of age numbered 117 (11%) and 10 people (1%) were over the age of 90.

Table 2: Age of Respondents

Age	MI	FL	KY	TN	WA	Total
Under 60	4% (17)	2% (2)	40% (55)	2% (2)	4% (10)	8% (86)
60-70	44% (188)	37% (33)	27% (36)	50% (59)	49% (128)	43% (444)
71-80	38% (165)	39% (35)	26% (35)	42% (49)	35% (92)	36% (376)
81-90	14% (58)	18% (16)	7% (10)	6% (7)	10% (26)	11% (117)
Over 90	>1% (2)	3% (3)	0	0	2% (5)	1% (10)
Total	100% (430)	100% (89)	100% (136)	100% (117)	100% (261)	100% (1033)

**Urban – Rural Residence:**

Respondents were asked if they lived in a rural area, small town, small city or large city. No attempt was made to define these terms in the survey. Respondents were fairly evenly divided among the different types of locations; surprisingly, large urban areas were not over-represented. Clients identifying their living area as “rural” totaled 21% of the 980 respondents. With the exception of Florida, 21-26% of respondents at every site were “rural”. To contrast, only 2% of Florida respondents selected “rural” as the type of area they lived in. This is due to the fact that the Legal Hotline for Older Floridians has largely restricted its operation to Miami-Dade County and Monroe County (the Florida Keys).

Approximately 20% of all clients reported living in small towns, with the exception of Florida. Florida, because of the intensely urban nature of its operations area, had only 5% of its respondents indicate they were from a small town. In Tennessee, 14% of the respondents selected “small town” as their residence. People living in a small city comprised 27% of respondents. That percentage was representative for Michigan, Kentucky, and Tennessee, although a slightly higher percentage of Washington respondents (35%) chose “small city”. Only 8% of Florida respondents selected “small city”.

Across all sites, 31% of respondents reported living in large cities. Fully 85% of the Florida

respondents resided there (Greater Miami), 26% of Michigan respondents chose “large city,” and 30% of Kentucky respondents did. Surprisingly, 42% of Tennessee respondents selected “large city” although we must presume that the Tennessee and Kentucky definition of “large city” is somewhat different than for Florida, Michigan, and Washington. Only 17% of Washington respondents selected “large city” as their place of residence.

Table 3: Type of City/Town

Size of town	MI	FL	KY	TN	WA	Total
Rural	24% (97)	2% (2)	26% (33)	22% (24)	22% (54)	21% (210)
Small town	22% (89)	5% (4)	22% (28)	14% (16)	26% (64)	21% (201)
Small city	29% (119)	8% (7)	23% (30)	22% (24)	35% (86)	27% (266)
Large city	26% (105)	85% (72)	30% (38)	42% (47)	17% (41)	31% (303)
Total	100% (410)	100% (85)	100% (129)	100% (111)	100% (245)	100% (980)

**Transportation:**

Over 87% of the 977 clients responding to a question about transportation reported access to it. These high percentages held true for all hotlines with Florida reporting the lowest access rate at the still high 79% and Washington reporting fully 91% having access to transportation. The high number reporting access to transportation may reflect that clients having transport are more likely to return a survey than those without; we cannot make that determination from the available data.

Nevertheless, the ability to serve the percentage of respondents who lack transportation is one of the benefits of the telephone delivery system. To the extent that lack of transportation has been an obstacle for this group of clients to perform problem resolution activities, programs may wish to consider developing a system, such as a brief service project component, to address that need.

Table 4: Access to Transportation

Access to transport	MI	FL	KY	TN	WA	Total
Yes	87% (353)	77% (66)	88% (110)	87% (101)	91% (221)	87% (851)

No	14% (55)	21% (18)	12% (15)	13% (15)	9% (23)	13% (126)
Total	100% (408)	100% (84)	100% (116)	100% (116)	100% (244)	100% (977)

**Income:**

Unlike the legal aid programs serving low-income clients, the hotlines serving seniors typically have no financial eligibility criteria. Any person over 60 is eligible to call for legal advice. Nevertheless, the surveys show that the respondents are overwhelming in the lower income groups. Over 70% of the 962 respondents to this question had yearly household incomes under \$20,000 and an additional 22% had yearly household incomes between \$21,000 and \$40,000. Only 8% had yearly household incomes over \$40,000.

Florida logged the poorest respondents by far – 88% of its reporting clients, mainly from Greater Miami, had incomes less than \$20,000 per year. Kentucky respondents were slightly better off financially than those in the other survey states. Over half (53%) of those respondents had incomes under \$20,000 with 30% having incomes between \$21-\$40,000.

Table 5: Household Income

Annual Household Income	MI	FL	KY	TN	WA	Total
Under \$20,000	66% (253)	88% (71)	53% (64)	72% (79)	80% (205)	70% (677)
\$21,000 to 40,000	28% (109)	7% (6)	30% (37)	17% (19)	16% (40)	22% (211)
Over \$40,000	6% (24)	5% (4)	17% (21)	11% (12)	5% (13)	8% (74)
Total	100% (391)	100% (81)	100% (122)	100% (110)	100% (258)	100% (962)

**B. CONTACT WITH THE HOTLINE**

**Access:**

The vast majority of respondents do not report any trouble reaching the hotline. Indeed, 81% of the 1,025 responding clients answered “no” to the query “Did you have much trouble reaching us?”

Table 6: Trouble Reaching the Hotline

Trouble Reaching hotline	MI	FL	KY	TN	WA	Total
Yes	10% (43)	38% (33)	8% (11)	15% (18)	34% (89)	10% (194)
No	90% (381)	62% (54)	92% (126)	85% (99)	66% (171)	81% (831)
Total	100% (424)	100% (89)	100% (137)	100% (117)	100% (260)	100% (1025)

Clients were also asked to choose among four possible strategies for improving access:

- Wait on hold for an attorney up to 15-20 minutes
- Leave a message with a receptionist and wait 1-3 days to be called back
- Leave a message on an answering machine and wait 1-3 days to be called
- Have the receptionist arrange a time for the attorney to call within 1-3 days.

Although only 19% (194 people) reported difficulty reaching the hotline, a total of 503 individuals responded to the question about preferred methods of contact when immediate telephone access is not feasible. The largest number preferred having the receptionist make a call-back appointment (44%). However, respondents in Washington (48%) and Tennessee (54%) preferred waiting on hold as their first option. Overall, waiting on hold was the second most favored option (38%). Leaving a message with a receptionist was selected by 13% of respondents across the five sites, while only 5% wanted to leave a message on an answering machine.

Table 7: Preferred Method of Contacting Hotlines When Immediate Telephone Access is Not Feasible

Option	MI	FL	KY	TN	WA	Total
Wait on hold	26% (50)	38% (24)	39% (17)	54% (25)	48% (76)	38% (192)

Leave message with receptionist	18% (35)	21% (13)	9% (4)	7% (3)	8% (12)	13% (67)
Answering machine	4% (8)	2 % (1)	18% (8)	2% (1)	5% (7)	5% (25)
Make call back appointment	52% (101)	38% (24)	34% (15)	37% (17)	40% (62)	44% (219)
Total	100% (194)	100% (62)	100% (44)	100% (46)	100% (157)	100% (503)

**Legal Matters:**

Respondents were asked to identify which kind of legal matter they called about. They could choose among four broad categories. Each contained a list of topics to help the client self-identify the subject area of the call.

- Wills/Estates (includes wills, powers of attorney, guardianships, trusts, joint ownership, probate)
- Consumer (includes debts, loans, credit cards, problems with products or services, bankruptcy)
- Health (includes Medicare, Medicaid, private insurance, nursing homes)
- Housing (includes landlord/tenant, real estate, mortgages, condos, utilities)
- Other matters

A total of 1,003 clients answered this question. Wills/estates was the most commonly chosen reason for calling the hotline. It was selected by 33% of the survey respondents. This case type was the most frequently selected by respondents in four of the surveyed hotlines. In Washington, however, “Consumer” matters outperformed wills 29% to 20% across the five hotlines. “Consumer matters” was selected by 19% of respondents; and health-related matters accounted for 12% of responses. The second largest portion of respondents indicated they called about “other matters” – 24%. From comments entered by respondents these included such issues as:

- Taxes
- Pensions
- Divorce
- Medical malpractice
- Class action
- Grandparent visitation

Table 8: Case Types

Subject	MI	FL	KY	TN	WA	Total
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Wills	35% (148)	30% (23)	51% (68)	37% (42)	20% (51)	33% (332)
Consumer	16% (67)	13% (10)	12% (16)	20% (23)	29% (74)	19% (190)
Health	12% (52)	12% (9)	14% (19)	13% (15)	11% (28)	12% (123)
Housing	9% (39)	26% (20)	7% (9)	5% (6)	17% (43)	11% (117)
Other	28% (116)	20% (15)	16% (22)	25% (29)	23% (59)	24% (241)
Total	100% (422)	100% (89)	100% (134)	100% (115)	100% (255)	100% (1003)

### C. INFORMATION AND ADVICE

Clients were asked to select the reasons why they had called the hotline. The choices were:

- Wanted information about a legal question
- Wanted advice about how to solve a legal problem
- Wanted a legal document prepared
- Wanted a legal document reviewed
- Wanted an attorney to handle a matter
- Other

Respondents were asked to check all responses that applied to them, therefore the total exceeds 100%. More than half of respondents (54%) called for information about a legal question. This was the most frequently cited reason for calling at all of the test hotlines

Approximately one-third (35%) of respondents called the hotline to get advice about solving a legal problem. Getting advice about a legal problem was the second most frequently chosen reason for calling at all sites except Kentucky. In Kentucky, a larger percentage (24%) contacted the hotline for document preparation rather than to solve a legal problem (20%). Interestingly, Kentucky respondents selected the Wills/Estates case type at a much higher percentage (51%) than the average across the five hotline sites (33%).

On average, only 8% wanted a legal document prepared and 3% wanted a document reviewed. A larger percentage, 17%, called because they wanted an attorney to handle a matter until it was resolved. The “other” category was checked in 17% of responses. Although explanations written in by clients were not numerically tabulated, they included the following reasons for calling the hotline:

- Get referral to a local attorney
- Get a divorce
- Set up a guardianship

- Get a publication on insurance
- Trouble with scamming
- Get information on dental discounts
- How to contact pharmaceutical companies
- I dialed the wrong number but he was helpful

Table 9 : Type of Service Desired

<b>Reason for calling</b>	MI	FL	KY	TN	WA	Total
Info. On Legal question	61% (266)	44% (39)	58% (57)	58% (70)	48% (126)	54% (558)
Advice on Legal Problem	31% (134)	42% (37)	20% (28)	33% (39)	47% (123)	35% (361)
Document Preparation	5% (21)	14% (12)	24% (33)	5% (6)	6% (15)	8% (87)
Document Review	2% (7)	5% (4)	6% (8)	4% (5)	3% (7)	3% (33)
Attorney to handle	12% (54)	30% (27)	13% (18)	8% (9)	28% (73)	17% (181)
Other	16% (68)	19% (17)	25% (34)	16% (19)	13% (35)	17% (173)

#### D. USER REACTIONS

##### **Helpfulness of the Advice:**

When asked about the helpfulness of the advice given, 87% of respondents across all sites found the legal advice they received to be at least somewhat helpful. All of the hotlines achieved a rating of at least 80% on the combined “helpful” and “somewhat helpful” ratings. Across sites, the advice was rated “helpful” by 69% of respondents and “somewhat helpful” by 18%. Only 13% of respondents rated the advice “not helpful”. These patterns underscore the important role that hotlines play in answering legal questions and giving legal advice.

Table 10: Helpfulness of Advice

Advice Rating	MI	FL	KY	TN	WA	Total
Helpful	70% (272)	50% (40)	80% (91)	75% (76)	65% (150)	69% (629)
Somewhat Helpful	10% (38)	31% (25)	9% (10)	8% (8)	18% (42)	18% (164)
Not Helpful	20% (79)	19% (15)	11% (13)	17% (17)	17% (40)	13% (123)
Total	100% (389)	100% (8)	100% (114)	100% (101)	100% (232)	100% (916)

For those clients who had characterized the legal advice they received as helpful in Question 10 (87% of respondents), the survey sought to discover more precisely how the advice had helped.

Clients could select items from the following list:

- It answered my question
- I understand my situation better
- I have an idea of how to solve my problem
- Some of my anxiety was relieved
- I understand the consequences of various courses of action
- I used it to solve my problem
- Other

Again, since clients were asked to check all responses that applied to them, totals exceed 100%. Over half (51%) of the client’s responding said the help they received had answered their question. Likewise, almost half (47%) indicated that the advice helped them to understand their situation better. Nearly one-third (32%) of the respondents indicated the advice gave them an idea of how to solve their problem. Anxiety relief was reported by 19%. Understanding the consequences of various courses of action was reported by 9%. Using the advice to solve the problem was reported by 13% of respondents. ‘Other’ garnered a response 12% of the time.

Examples of the “other” comments written in by clients included:

- You told me to send a registered letter. I did. I got results
- They wanted me to sign a contract. I did not
- I received the proper forms
- Told me proper people to contact
- At least I tried something
- The Justice Dept. solved my problem with the phone company. My bill was adjusted

Table 11: Reason Why Advice was Helpful

Type of Help	MI	FL	KY	TN	WA	Total
Answered Question	50% (177)	42% (23)	60% (62)	53% (49)	48% (92)	51% (403)
Understand Situation	46% (163)	38% (21)	45% (47)	51% (47)	50% (95)	47% (373)
Idea for solving problem	30% (102)	20% (11)	40% (42)	28% (26)	39% (74)	32% (255)
Anxiety Relief	18% (64)	11% (6)	23% (24)	17% (16)	21% (40)	19% (150)
Courses of Action	8% (29)	16% (9)	7% (7)	7% (6)	9% (17)	9% (68)
Used to solve problem	11% (40)	11% (6)	16% (17)	15% (14)	15% (29)	13% (106)
Other	9% (33)	11% (6)	13% (13)	13% (12)	17% (33)	12% (97)

**Patterns of Unhelpfulness of the Advice:**

A total of 123 people (13%) characterized the advice they received as “not helpful.” These clients were asked to check all of the following reasons why that advice had not been helpful to them. Their choices were:

- The advice did not help solve the problem
- Didn’t understand the advice
- The attorney didn’t answer all of the questions
- The attorney told me my problem could not be resolved
- Other

Since the respondents could select more than one reason, the percentages exceed 100%. Of the respondents who found the advice “unhelpful”, 44 % selected “the advice did not help me solve my problem” as the reason why. Only 13 people, 10%, stated that they didn’t understand the advice. Twenty-three respondents (19%) felt that the attorney didn’t answer all of their questions. Attorneys reportedly told 22 people (18%) that their problem could not be resolved. Although only 13% of the total respondents across the five sites characterized the advice they had received as unhelpful, a sizable minority of that group apparently rated it this way because they learned their problem had no solution. Their unfavorable ratings do not appear to reflect a service delivery problem since learning that your problem has no solution is “helpful”. Clearly, for some clients it remains difficult to distinguish between disappointing news and bad advice.

“Other” was selected by 46 (37%) respondents:

- They could not represent me
- They told me to stay with the lawyer I had
- They didn't really know what could be done

Table 12: Why Advice was not Helpful

<b>Advice not helpful</b>	MI	FL	KY	TN	WA	Total
Didn't solve problem	47% (18)	48% (12)	20% (2)	38% (3)	45% (19)	44% (54)
Didn't understand it	8% (3)	16% (4)	20% (2)	25% (2)	5% (2)	11% (13)
All questions not answered	16% (6)	20% (2)	10% (1)	25% (2)	21% (9)	19% (23)
Problem can't be resolved	21% (8)	20% (5)	20% (2)	0	17% (7)	18% (22)
Other	40% (15)	32% (8)	40% (4)	38% (3)	38% (15)	37% (46)

#### E. FOLLOW-UP ACTIONS AND OUTCOMES

##### **Recommended Actions:**

A total of 880 clients responded to the question “Did we suggest you take any action to solve your legal problem?” Fully half were not advised to take any follow up action. This appears to track with a similar percentage of respondents (53%) who stated the reason for their call was to get information or advice on a legal question. Across all sites, 43% of the respondents indicated they were told to take a follow up measure while 7% of respondents did not know whether the hotline suggested follow-up action.

Table 13: Number and Percentage of Respondents Who Reported Being Advised to Take Follow-up Action.

Follow-up Suggested	MI	FL	KY	TN	WA	Total
Yes	43% (161)	51% (34)	44% (51)	29% (28)	50% (112)	43% (380)
No	50% (185)	52% (37)	51% (59)	68% (65)	43% (96)	50% (442)

Don't know	6% (24)	9% (6)	5% (6)	4% (4)	8% (18)	7% (58)
Total	100% (370)	100% (71)	100% (116)	100% (97)	100% (226)	100% (880)

**Actions Taken:**

Although legal hotlines typically keep records of the type of service rendered and the nature of the advice given, they do not have the resources to routinely re-contact clients to determine if they followed any advice given or what outcomes clients may have achieved. Collecting an overview of follow-up information was a major goal of the survey. The results of this inquiry are extremely encouraging. Of the 380 people who reported receiving advice to take a follow up action in Question 13, a total of 358 responded to Question 14 asking whether they had, in fact, taken such action. 82% (294) of these 358 respondents stated that they took follow up action. The highest rate of client follow-up action was reported in Kentucky (96%), the lowest in Florida (74%). Taking no-follow-up action was reported by 17% of respondents; only 1% claimed not to know whether such action had been taken. The rate of follow-up by respondents may be higher than those for non-responding clients on the theory that those clients who fill out and send back a survey are also more likely to take follow-up action. However, such a determination is beyond of the scope of this study.

Table 14: Number and Percentage of Respondents Reporting Whether They Took Follow-up Action Upon Being Advised To Do So

Took Action	MI	FL	KY	TN	WA	Total
Yes	82% (124)	74% (20)	96% (43)	77% (20)	81% (87)	82% (294)
No	17% (26)	22% (6)	6% (3)	19% (5)	19% (20)	17% (60)
Don't Know	1% (2)	4% (1)	0	4% (1)	2% (5)	1% (4)
Total	100% (152)	100% (27)	100% (46)	100% (26)	100% (107)	100% (358)

The clients who reported taking a follow-up action based on advice from the hotline worker were then asked to select what type of action they took. Clients were asked to select all responses that applied to them. Clients were given the following list of actions to check:

- I made a phone call to try to resolve the matter

- I wrote a letter
- I contacted the agency you referred me to
- I prepared legal papers
- I asked for a court or agency hearing
- I hired an attorney
- I was assigned a free attorney
- Other

Making a phone call was the most frequent action taken (38%) followed by writing a letter (32%). Clients who reported contacting an agency comprised 24% of those reporting taking action. Legal papers were prepared by 14% while only 8% reported asking for a hearing. A larger percentage, 15%, reported hiring an attorney while 6% were assigned a free attorney. Examples of “other” actions clients took include the following:

- Hired a roofer to fix the problem
- I paid the bill
- Contacted office in person
- Went to city hall and got fined reduced
- Accepted situation
- Talked with the administrator of apartment building

Table 15: Client Follow-up Actions (*Select all that apply-does not equal 100%*)

Type of Action	MI	FL	KY	TN	WA	Total
Phone Call	44% (54)	25% (5)	42% (18)	40% (8)	30% (26)	38% (111)
Wrote Letter	29% (36)	35% (7)	30% (13)	20% (4)	40% (35)	32% (95)
Contacted Agency	23% (29)	35% (7)	37% (16)	15% (3)	18% (16)	24% (71)
Prepared Papers	9% (11)	5% (1)	37% (16)	10% (2)	13% (11)	14% (41)
Asked for Hearing	7% (8)	10% (2)	12% (5)	0	8% (7)	8% (22)
Hired Attorney	16% (20)	5% (1)	5% (2)	25% (5)	20% (17)	15% (45)

Free Attorney	3% (4)	10% (2)	7% (3)	5% (1)	8% (7)	6% (17)
Other	15% (19)	15% (3)	12% (5)	15% (3)	21% (18)	16% (48)

**Outcomes:**

Of the 294 respondents who answered that they had taken a follow up action, 284 responded to Question 16, requesting a reported outcome. Nearly half (49%) of the clients reported that their problem was at least partially resolved: 33% characterized their action as fully resolved, and 15% reported that the problem was partially resolved. Fully 43% reported that they were still awaiting results of their action. Surveys were sent between 1-2 months after the client’s consultation with the hotline attorney. That time frame was selected so that enough time would have passed for some action to be taken while still leaving the consultation somewhat fresh in the client’s memory. However, with regard to ultimate outcomes the time frame for sending the surveys was rather short as evidenced by the fact that 43% were still waiting for the results of their actions when they completed the survey. We can safely assume that with the passage of time at least some portion of those 43% will also obtain a favorable outcome. A much smaller percentage (9%) reported that the action they took didn’t resolve their problem.

Table 16: Results of Client Follow-Up Actions

Outcome	MI	FL	KY	TN	WA	Total
Completely Resolved	33% (39)	26% (5)	45% (18)	45% (9)	25% (22)	33% (93)
Partially Resolved	9% (11)	16% (3)	25% (10)	10% (2)	20% (17)	15% (43)
Still Waiting	47% (55)	53% (10)	23% (9)	40% (8)	47% (41)	43% (123)
Did Not Resolve	11% (13)	5% (1)	8% (3)	5% (1)	8% (7)	9% (25)
Total	100% (118)	100% (19)	100% (40)	100% (20)	100% (87)	100% (284)

Responses for those clients who indicated in Question 16 that the advised action failed to result in their problem being solved were tabulated to determine the reasons they believed the action failed. There were 25 responses that fell within these parameters. These numbers are so small that it is impossible to draw one definitive reason why respondents failed to follow the advice given by the hotline or why the advised action failed to solve the problem. Various reasons were cited by small numbers of clients. The greatest number of respondents in this group, 13 (52%) selected “other” as their answer. Clients were asked to choose from the following reasons:

- I did not understand or forgot what to do
- It was too hard to do what you advise
- It was too expensive to do what you advised
- I haven’t gotten around to doing it yet
- It didn’t seem worth the effort
- I lost my case in court
- My problem was resolved without taking any action
- Other

None of these respondents admitted failing to understand the advice or forgetting what to do. One person selected “too hard to follow”. Expense was listed as a prohibiting factor by 24% (12) of the people who had been advised to take some action. The problem resolved itself for a reported 12% (3 people). Some additional reasons offered by clients were:

- Couldn’t get anyone who would take the case
- Conflicting information
- The company lawyers have me on a small claims merry go round
- The boy had no money
- The advice indicated that my problem was futile

Table 17: Reason action didn’t resolve problem

Reason	MI	FL	KY	TN	WA	Total
Forgot	0	0	0	0	0	0
Too hard	0	1	0	0	0	1 (4%)
Too Expensive	4	0	1	0	1	6 (24%)
Procrastination	0	0	0	0	0	0
Not worth Effort	0	0	0	0	0	0

Lost Case	1	0	0	0	0	1 (4%)
Problem Resolved itself	2	0	0	0	1	3 (12%)
Other	5	0	1	0	6	13 (52%)

**E. CLIENTS WHO ANSWERED “NO” TO QUESTION 13 (DID NOT RECEIVE FOLLOW UP ADVICE) BUT REPORTED TAKING ACTION ANYWAY.**

Question 13 inquired whether the client had received a suggestion to take follow up action. 442 respondents (50%) said “No”. Of these respondents, 107 (24%) stated that they took some follow-up action anyway. We have no explanation for their actions. A review of a small sampling of surveys shows that these clients simply checked “No” for Question 13 (no follow-up advice given) and “Yes” for Question 14 (Did you follow the advice). They then proceeded to answer the survey as if they had been advised to take follow up action. The choices they selected are fairly parallel to those clients who indicated they took action as a result of hotline advice. Making a phone call was the most frequent action (35%) followed by writing a letter (24%). 18% selected the “other” category” (Respondents could choose more than one action so totals do not add up to 100%). Since the analysis for this group of clients is tangential to the main focus of the study, only totals are included rather than site break-downs.

Table 18. Follow up actions taken by clients not advised to do so

Type of Action	Phone Call	Wrote letter	Contact Agency	Prepared Papers	Asked for hearing	Hired Atty	Free Atty	Other
	37 35%	26 24%	25 23%	16 15%	5 5%	9 8%	7 7%	19 18%

This group of respondents also achieved similar rates of success with their follow-up actions. Of

the 95 people who said they had taken action without being advised to do so and reported an outcome, 31% reported complete resolution of their problem, 15% reported partial resolution. A somewhat smaller number than the clients who took action upon advice are still waiting for the outcome (38%) but a higher proportion of those clients who acted without advice (21% vs. 9%) found the action did not resolve their problem.

Table 19. Results of Follow-up Actions by Clients not advised to Follow-up

Resolution of problem	Completely Resolved	Partially Resolved	Still Waiting	Didn't Resolve	Totals
	29	14	32	20	95
	31%	15%	34%	21%	100%

## F. RELATIONSHIPS BETWEEN CASE TYPES AND OUTCOMES

The Foundation asked the Center for Policy Research to run a computation comparing outcomes achieved with the case type reported by the client in order to investigate whether particular case types are more suitable for resolution at the hotline level. All respondents who listed a case type and indicated an outcome were included in this tabulation. Within 1-2 months after contacting the hotline, almost two-thirds (64%) of respondents with the Wills/Estates case type, achieved at least partial resolution to their problem, and nearly half (46%) achieved complete resolution. This was the most successfully handled case type at four of the hotlines. In Kentucky and Tennessee, respondents reported complete resolution rates of over 58% for Wills/Estates. Wills/Estate cases often present questions that the hotline can answer immediately and are amenable to quick document preparation by the hotline or through a referral. This would include matters such as wills, living wills, powers of attorney, and health care surrogacies.

Respondents at Clear\*<sup>Sr</sup> in Washington reported excellent results in the Health-related case type. Over half (53%) of those cases were completely resolved and another 7% were partially resolved. Washington was the only state where the Wills/Estates case types did not have the highest resolution rate.

Consumer cases had the lowest complete resolution rate across all sites (20%). Another 14% were partially resolved, however, consumer cases had the highest level of “still waiting” responses (50%). This probably reflects the fact that resolving consumer problems requires writing letters, phone calls, and possible court actions. The “housing” case type had an across site “completely resolved” rate of 27.0% and a “partially resolved” rate of 14%. Over one-third of housing clients were still waiting for results. The housing case type had the highest percentage by far of cases that were not resolved (26%). This may be due to the nature of landlord-tenant problems that are often only resolved when a client moves.

A substantial number of clients in all case types (24% - 50%) were still waiting for the results of

the action they had taken. Apart from “housing”, none of the four case types had “didn’t resolve” rates of more than 16% although 17% of “other” case types were not resolved.

Table 17 presents the results of an analysis of case types and outcomes by hotline and for all sites. Each percentage represents the portion of the total number of persons with that case type that achieved a particular outcome. For instance, in Michigan, 6 people, or 12% of the Michigan respondents with a consumer problem, achieved a partial resolution, while 13 people, or 17% of the Michigan respondents with a wills/estates problem achieved a partial resolution.

Table 20: Outcomes for Reported Case Types

Case Type	Wills/Estate	Consumer	Health	Housing	Other	Total
<b>ALL SITES</b>						
Completely Resolved	46% (79)	20% (29)	35% (26)	27% (20)	28% (39)	32% (193)
Partially Resolved	19% (32)	14% (20)	20% (15)	14% (10)	12% (17)	16% (94)
Still Waiting	24% (42)	50% (71)	33% (25)	34% (25)	43% (59)	37% (222)
Didn't Resolve	12% (20)	16% (22)	12% (9)	26% (19)	17% (23)	15% (93)
<b>Total</b>	<b>100 % (173)</b>	<b>100% (142)</b>	<b>100% (75)</b>	<b>100% (74)</b>	<b>100% (138)</b>	<b>100% (602)</b>
<b>MICHIGAN</b>						
Completely Resolved	41% (31)	25% (13)	25% (12)	33% (7)	32% (23)	34% (86)
Partially Resolved	17% (13)	12% (6)	17% (6)	14% (3)	4% (3)	12% (31)
Still Waiting	26% (20)	48% (25)	39% (14)	27% (6)	44% (32)	38% (97)
Didn't Resolve	16% (12)	15% (8)	11% (4)	24% (4)	19% (14)	17% (43)
<b>Total</b>	<b>100% (76)</b>	<b>100% (52)</b>	<b>100% (36)</b>	<b>100% (21)</b>	<b>100% (72)</b>	<b>100% (257)</b>
<b>FLORIDA</b>						
Completely Resolved	33% (3)	22% (2)	29% (2)	15% (2)	14% (1)	22% (10)
Partially Resolved	11% (1)	0	14% (1)	0	29% (2)	9% (4)
Still Waiting	33% (3)	56% (5)	57% (4)	54% (7)	29% (2)	47% (21)
Didn't Resolve	22% (2)	22% (2)	0	31% (4)	29% (2)	22% (10)

Total	100% (9)	100% (9)	100% (7)	100% (13)	100% (7)	100% (45)
<b>Kentucky</b>	Wills/Est.	Consumer	Health	Housing	Other	Total
Completely Resolved	59% (20)	25% (3)	27% (3)	25% (1)	44% (4)	44% (31)
Partially Resolved	21% (7)	17% (2)	27% (3)	0	22% (2)	20% (14)
Still Waiting	18% (6)	25% (3)	36% (4)	25% (1)	22% (2)	23% (16)
Didn't Resolve	3% (1)	33% (4)	9% (1)	50% (2)	115 (1)	13% (9)
Total	100% (34)	100% (12)	100% (11)	100% (4)	100% (9)	100% (70)
<b>TENNESSEE</b>						
Completely Resolved	58% (14)	7% (1)	17% (1)	20% (1)	41% (7)	36% (24)
Partially Resolved	13% (3)	27% (4)	67% (4)	40% (2)	12% (2)	22% (15)
Still Waiting	21% (5)	47% (7)	0	0	41% (7)	28% (19)
Didn't Resolve	8% (2)	20% (3)	17% (1)	40% (2)	6% (1)	13% (9)
Total	100% (24)	100% (14)	100% (6)	100% (5)	100% (17)	100% (67)
<b>WASHINGTON</b>						
Completely Resolved	37% (11)	19% (10)	53% (8)	29% (9)	12% (4)	26% (42)
Partially Resolved	27% (8)	15% (8)	7% (1)	16% (5)	24% (8)	18% (30)
Still Waiting	27% (8)	57% (31)	20% (3)	26% (11)	49% (16)	42% (69)
Didn't Resolve	10% (3)	9% (5)	20% (3)	19% (6)	15% (5)	14% (22)
Total	100% (30)	100% (54)	100% (15)	100% (31)	100% (33)	100% (163)

## G. GENERAL SATISFACTION WITH HOLINES

At the end of the survey, callers were asked if they would use the legal hotline again for another question or problem. This question was intended to gauge general satisfaction with the services

provided. Of the 974 people who responded to this question, an overwhelming majority (83%) stated they would call the hotline again. Only 6% stated that they would not call while 10% did not know whether they would do so.

Table 21: Would Client Call the Hotline Again for Another Matter

Would you Call again	MI	FL	KY	TN	WA	Total
Yes	87% (354)	73% (60)	90% (113)	83% (92)	79% (193)	83% (812)
No	6% (24)	12% (10)	2% (3)	4% (5)	8% (20)	6% (62)
Don't know	8% (31)	15% (12)	9% (11)	13% (14)	13% (32)	10% (100)
Total	100% (409)	100% (82)	100% (127)	100% (111)	100% (245)	100% (974)

## Summary of Results

The survey results indicate that legal hotlines provide quick access for clients and useful information and advice. A majority of respondents who receive legal advice report taking follow-up actions and achieving favorable outcomes. Highlights of the survey results are as follows:

- 81% of respondents did not have much trouble reaching the hotline
- 52% called to get information on a legal question
- 35% called to get advice about solving a legal problem
- 87% found the advice at least somewhat helpful (69% helpful and 18% somewhat helpful)
- 43% were advised to take a follow-up measure
- 82% of those advised to do so, performed the follow-up measure
- 48% of those performing the follow up measure achieved complete or partial resolution of their problem when surveyed two months after their call to the hotline
- 43% of those performing the follow up measure are still awaiting results
- 9% were not able to resolve their problem

## Conclusion

The survey results demonstrate that the five senior hotlines have been very successful in meeting the needs of their callers. Clients primarily report needing answers to legal questions and advice on solving legal problems. The vast majority of respondents (87%) have found the advice they received from the hotline to be beneficial.

Although it was feared that most seniors would fail to perform needed follow-up actions recommended by hotline advocates, the survey responses did not support the fear. 380 respondents answered that they had been advised to take a follow up action. If those 380, 358 responded to the question whether they had taken the follow up action. 82% of those 358 clients responded that they took follow-up action.. While it is likely that survey respondents are more proactive clients, the percentage of respondents taking follow up action upon hotline advice is encouragingly high. It remains important to address the needs of the clients who do not choose to follow-up for a variety of reasons. Inclusion of a brief service unit in the legal service delivery plan or provision of more brief service by the hotline itself should be considered to address this need.<sup>2</sup>

The survey results show that two months after phoning the hotline, 33% of the respondents' problems were completely resolved, 15% were partially resolved and 43% were still waiting for results. Only 9% reported that following the advice had failed to solve their problem. A follow up study to determine ultimate results after a longer waiting period would be beneficial.

The hotlines appear to be doing optimal work with the Wills/Estate case types. Fully 47% of respondents with these types of cases report some favorable result after the hotline contact. The "Health" case type (Medicare, Medicaid, etc) also shows very favorable outcomes. The majority of respondents with "consumer" problems were still waiting for results 1-2 months after the hotline contact. Further follow-up with these clients to determine the eventual outcomes would be most useful.

The "Housing" case type appears to present the greatest challenge to hotline resolution with over 25% of those clients reporting no resolution to their problem. Further follow-up with these clients would be an extremely important area for investigation. A study to determine whether the unresolved housing problems were of the type that would be amenable to further brief services, would benefit from full-service representation, or present a social service matter, would greatly assist programs in planning for the allocation of staff and resources and development of referral agency contacts. It would also contribute to the general knowledge regarding the unmet needs of seniors.

### **Appendix (*With Raw Data Inserted*)**



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<sup>2</sup> See W.Moore, "A More Productive, More Versatile Legal Hotline Methodology, A New Concept in Delivery-The Brief Services Unit", Legal Hotline Quarterly, Fall 2000.

## Legal Hotline Name

You recently called our legal hotline for assistance. AARP Foundation is conducting a survey to determine how helpful our hotline is. Please take a few minutes to complete this survey and return it in the reply envelope enclosed. Your response will help us improve our service. For confidentiality, please do not put your name on the survey. Thank you for helping us.

*Please check:*

1. Are you : Male 299 Female 722
2. Under Age 60: 86 Age 60-70 : 444 Age 71-80: 376 Age 81-90: 117 Over 90: 10
3. Do you live in a: rural area 210 small town 201 small city 266 large city 303
4. Do you have access to transportation? Yes 851 No 126
5. Yearly household income: Under \$20,000 677 \$21,000-\$40,000 211 Over \$40,000 74

### *Initial Contact*

6. Did you have much trouble reaching us? yes 194 no 831
7. If yes, in the future which one of the following options you would prefer:  
192 wait on hold until I could talk to an attorney, even if the wait was 15-20 minutes.  
67 leave a message with a receptionist and wait 1-3 days to be called back  
25 leave a message on an answering machine and wait 1-3 days to be called back.  
219 have the receptionist arrange with you the day and time an attorney would call back (usually within 1-3 days.)

8. Which kind of legal matter did you call about: (*Check one*)  
332 Wills/Estates (Includes wills, powers of attorney, guardianships, trusts, joint ownership, probate)  
190 Consumer (Includes debts, loans, credit cards, problems with products or services, bankruptcy)  
123 Health (Includes Medicare, Medicaid, private insurance, nursing homes)  
117 Housing (Includes landlord/tenant, real estate, mortgages, condos, utilities)  
241 Other matters

### *Information and Advice*

9. Why did you call us? (*check all that apply*)  
558 I wanted information about a legal question  
361 I wanted advice about how to solve a legal problem  
87 I wanted a legal document prepared  
33 I wanted a legal document reviewed  
181 I wanted an attorney to handle a matter until it was resolved  
173 Other: Please explain \_\_\_\_\_

10. If we gave you legal advice, was it helpful? Yes 629 No 123 Somewhat 164

11. If the advice was helpful, describe how it helped: *(Please check all that apply)*

403 It answered my question

373 I understand my situation better

255 I have an idea of how to solve my problem

150 Some of my anxiety was relieved

68 I understand the consequences of various courses of action

106 I used it to solve my problem

97 Other: Please explain \_\_\_\_\_

12. If the advice was not helpful, please describe why *(check all that apply)*

54 The advice did not help me solve my problem

13 I didn't understand the advice

23 The attorney didn't answer all of my questions

22 The attorney told me that my problem could not be resolved

46 Other: Please explain \_\_\_\_\_

13. Did we suggest that you take any action to solve a legal problem you had?

Yes 380

No 442

I don't know 58

14. Based on our advice did you take any action? Yes 294 No 60 I don't know 4

15. If yes, what did you do? *(Check all that apply)*

111 I made a phone call to try to resolve the matter

95 I wrote a letter

71 I contacted the agency you referred me to for help

41 I prepared legal papers

22 I asked for a court or agency hearing

45 I hired an attorney

17 I was assigned a free lawyer

48 Other: Please explain \_\_\_\_\_

16. If you took the action we recommended, what was the result? *(Check one)*

93 my problem was completely resolved

43 my problem was partially resolved

123 I am still waiting for the results of my action

25 the action didn't resolve my problem

17. If the action did not resolve the problem, please check the reason below: *(Check all that apply)*

0 I did not understand or forgot what to do

1 it was too hard to do what you advised

6 it was too expensive to do what you advised

0 I haven't gotten around to doing it yet

0 It didn't seem worth the effort

1 I lost my case in court

3 My problem was resolved without taking any action

13 Other: Please explain \_\_\_\_\_

18. Would you call us again if you had another legal question or problem? Yes 812 No 62  
Don't know 100

Please use the space below to tell us what else we could have done to help. Please also write any other comments you have about our service:

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