

***I Summary of Results:
Senior Statewide Legal Hotlines Client Outcome Study 2002***

Client/Hotline Advocate Characteristics

- Virtually all callers to the three senior hotlines were over 60 years of age
- 70% of respondents were women.
- 70% of respondents have incomes under \$20,000 per year.
- 32% of respondents have access to the internet. Female, older clients, and clients with incomes of less than \$12,000 per year are less likely to have internet access but internet access did not have a significant effect on whether respondents followed the advice or on the outcomes achieved.
- 87% rated the hotline advice as helpful or somewhat helpful
- The attorney/paralegal hotline advocate factor did not have a significant impact on whether the client reported taking action nor the results achieved.
- Problems labeled with the “Family” casetype were the least likely to be resolved during the survey period and respondents with the “Family” casetype were the least likely to be satisfied.
- The overwhelming majority of clients report they would call the hotline again.
- The results from the 2002 were virtually identical to the results from the 2000 senior hotline survey for those items analyzed in both studies. The variable of increased length of time between hotline consultation and survey time in the latest survey resulted in a larger percentage of cases that were completely resolved and a decrease in the percentage of clients that were still waiting for the results of their follow-up action.

Was Advice Followed

- 45% of respondents called the hotline to get an answer to a legal question
- 43% wanted advice about how to solve a legal problem
- 45% of respondents reported being advised to take a follow-up action
- 85% of those respondents reported taking a follow up action.

Results of Action

Of those who reported taking action:

- 41% reported their problem was completely resolved
- 16% reported their problem was partially resolved
- 30% reported they were still waiting for results of action
- 12% reported their action didn't solve the problem
- Among those who are still waiting for results, 54% have been waiting between one-two months.

Correlations with Casetypes

- Callers with Wills/Estates casetype were significantly more likely to report their problem as being completely resolved (60%)

- Callers with the Family casetype were significantly less likely to report their problem as completely resolved (21%) and more likely to be still waiting (50%) than other casetypes; they were significantly less likely to find the advice helpful
- Casetype did not significantly affect the percentage of callers who reported taking follow up action

II Comparison of Project for the Future of Equal Justice Hotline Outcome Study

The most notable differences in results between the PFEJ and senior hotline surveys is that senior hotline clients report following the advice and achieving a favorable outcome at somewhat higher rates than the PFEJ clients.

- Senior clients were much more likely (45%) to report that they needed only an answer to a legal question than PFEJ clients (21%). For these clients, the hotline consultation was very likely to result in a favorable outcome since they usually got what they wanted within the context of the phone consultation. However, these cases were not counted in the senior hotline outcome results.
- 85% of the 43% of senior respondents advised to follow up reported doing so while only 39% of the PFEJ who should have taken action were judged by PFEJ to have acted on hotline advice. 27% of PFEJ clients were judged not to have acted because of a variety of factors, including failure to understand the advice, lack of time or fear of action., while 12% of the senior respondents reported failure to take action
- PFEJ clients acted and got favorable results in 31% of reviewed cases, while 57% senior respondents reported a positive outcome. That includes the 12% of senior respondents who report being assigned a free attorney.

Conclusion on Comparisons

Although it might seem possible to conclude that the senior hotlines are more successful at explaining follow-up actions, getting clients to take action, and achieving more positive outcomes than the low-income hotlines, most of the differences in findings, apart from the survey structures, can likely be explained by the different client demographics and casetypes in the two populations.

The typical client interviewed by the PFEJ was a middle-aged, English-speaking female, single parent with at least minor-aged child. Average income was 101% of FPL. Over 70% of clients in both studies were female. The senior callers likewise tended to be low-income but a substantial proportion was above the poverty level. Although these factors were not surveyed, the senior callers were logically much more likely to have a stable income from Social Security or SSI, access to medical care in the form of Medicare or Medicaid, a stable housing situation, no minor children to support, and be much less likely to be employed full time. They are not likely to have problems such as divorce and custody requiring immediate action. They are more likely to have the time to take those actions advised by the hotline to solve their problem.

An even greater impact on results most likely stems from the casetypes about which the two populations contact the hotline. Respondents in the senior surveys report calling for just an answer to a legal question at a much higher rate than the clients in the PFEJ study. (45% vs. 21%). As a result, the hotline model is likely to be a satisfactory method of delivering services to a higher percentage of seniors than other callers.

Equally as important was the disparity in calls about the Family casetype between the two study populations. This casetype had the lowest resolution rate and highest still pending rates in both senior and low-income surveys. However, Family cases represented only 8% of senior hotline clients vs. 39% in the PFEJ study. The Family casetype was twice as common as any other casetype at the low-income hotlines thereby causing greater impact on the low-income outcome results.

Finally, over 20% of senior hotline respondents called about the Wills/Estates casetype. This casetype seems particularly amenable to handling by a hotline with a completely resolved rate of 60% - the highest of any category. However, it is one that was not even identified as a casetype by the low-income hotlines study.

Consumer issues were about 20% of casetypes for both populations so recommendations for practices in this subject area are probably the most applicable to both populations.

III Findings and Recommendations

This portion of the report attempts to sum up the general findings and recommendations that can be inferred from the Senior Hotline outcome surveys.

A summary of specific findings from the data analyzed in the Senior Legal Hotline Outcomes Survey.

With regard to respondents to the Senior Legal Hotline Outcome Survey:

- Senior hotline client demographics such as age, gender, and income did not affect respondent's decision to follow-up or the outcome achieved
- Senior Legal Hotlines were very successful at answering client questions, explaining legal rights and procedures, and generally helping survey respondents understand their situations
- Senior Legal hotline advocates, whether attorneys or experienced paralegals, were very good at giving valuable advice, which, if followed, resulted in a favorable outcome for the client
- Senior Legal hotlines were very successful in getting respondents to follow their advice.
- Legal hotline advice is more successful in certain casetypes, particularly Wills/Estates routinely handled by the senior hotlines

Recommendations

Now that the PFEJ and Senior Hotline outcomes studies have been completed, and the results analyzed and debated, it is time to apply the findings to refining the hotline model. Based on these findings, the major innovations hotlines

require are findings ways to provide more brief services to clients who are not likely to successfully perform the recommended action and finding ways, within the spectrum of the legal services system, to provide more help to clients who have problems not likely to be resolved by follow-up action but for whom no full services are available.

Some steps hotlines may wish to consider:

- Developing a system for re-contacting certain clients to see if they have performed a follow-up action. These include clients whom the hotline advocate identifies, in his discretion, as likely to need assistance to achieve a successful outcome for an important problem as well as clients that have certain barriers to follow up such as those identified in the PJEF.¹ Such a system would take into account a hotline's inability to follow-up with everyone as well as the fact that some problems may be minor enough that it would not be a reasonable use of hotline resources to re-contact the client.
- Instituting a brief services unit to make phone calls, write letters, get information from agencies, assist in filling out forms, and perform other discreet and limited tasks likely to solve the clients problem.²
- Undertaking a systemic analysis of casetypes and common client scenarios within each casetype, to determine whether hotline advice and client follow-up is effective for that problem. Both the PFEJ and Senior studies have already identified Family law as a casetype the hotline model has not served as successfully as others. As an additional example, one senior hotline recently made the determination that hotline clients with home repair problems were likely to have a favorable outcome when they had not paid in full, while clients who had already paid were unsuccessful in getting a good result. While such a determination is completely expected, it is not one hotlines have generally considered in an organized fashion.
- Planning strategies with funders, legal services providers, courts, law schools, and the private bar to increase service options for those types of problems for which full representation is not presently available but for which hotline advice or brief services is not likely to result in a favorable outcome.

¹ These included non-English speakers, extremely low-income or low-education clients, transportation problems and others PREJ Final Report at 49,65

² See *LHQ Spring 2002, 9 and Winter 2002,1 for descriptions of two types of brief services units at LCE in Washington D.C. and Legal Aid Society of Hawaii*