
Legal Hotline Quarterly

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ABA Drafts Standards for Legal Hotlines

The ABA Standing Committee on the Delivery of Legal Services completed its initial draft of *Standards for the Operation of A Telephone Hotline Providing Legal Advice and Information*. The draft was circulated at the ABA/NLADA Equal Justice Conference 2000 in Houston, April 2000. The Standards are divided into four sections: Procedures, Intake and Processing, Quality Standards, and Compliances.

The Delivery Committee met again in May and made revisions oriented toward clarification and emphasis on the obligation of hotlines to comply with ethics and core values. The revision should be completed in time for the ABA annual meeting in July. As soon as it is available, we will post the Standards at the Legal Hotline Technical Assistance homepage at the Project for the Future of Equal Justice website.

www.equaljustice.org/hotline1

The ABA is seeking your analysis and comments. After you review them, please provide your comments to the Committee's staff counsel, William Hornsby at:

w.hornsby@staff.abanet.org

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Excerpts from the Final Report- “Hotline Outcomes Assessment Study- Phase I”

Center for Policy Research , Denver, CO
March 2000

For the full text of the Report go to:
www.equaljustice.org/hotline1

SUMMARY OF CONCLUSIONS

Phase I of the Hotline Outcomes Assessment Study was conducted for the Project for the Future of Equal Justice by the Center for Policy Research, Denver, an independent research firm.

Phase I focused primarily on the impact that adopting a *telephone intake, legal advice, brief services, and referral system* (“Hotline”) has on the caseload statistics of LSC-funded programs. The researcher used the Case Summary Reports (CSR) data provided by programs to LSC to compare pre-Hotline and post-Hotline caseload statistics in programs that have adopted such systems. The analysis tracked the changes in the overall number of clients served and the level of brief services (including advice and referrals) and extended services. The study sought to analyze the extent to which the post-Hotline data showed an increase in the level of brief services without a decrease in the level of extended services.

Phase I was limited to LSC-funded programs because the CSR data, despite its limitations, is the only currently existing source of information concerning pre- and post-Hotline caseload levels. The researcher began by interviewing the managers of 44 Hotlines listed in the State-by-State Legal Hotline Directory. The primary purpose of these interviews was to identify those programs with comparable quantitative data for two years prior to and following the introduction of the Hotline. The managers and directors were also interviewed about their perceptions of the effectiveness of Hotlines in improving services to clients and about the particular strengths and weaknesses of Hotlines. The interviews also generated a significant body of information about varieties of Hotline staffing and a number of other issues relating to Hotline design and implementation.

All but 16 of the programs interviewed had to be eliminated from the quantitative part of the study because only one year of post-Hotline data was available or because of other factors that would have prevented comparison of pre- and post-Hotline data (for example, a change in the size of the service area; a major change in the way that CSR case category definitions were applied). One significant category of LSC-funded Hotlines that was excluded was the group of new Hotline-centered programs created in 1996 in Connecticut, Massachusetts, Vermont, New Hampshire, and Washington State. These programs had to be excluded because: 1) there is no pre-Hotline data available for comparison; and 2) they do not provide extended services. The results of all 44 interviews were considered in the qualitative sections of the report.

The Phase I Report reaches the following conclusions:

1. Hotlines can be effective, but success is not guaranteed.

If effectiveness is defined as increasing capacity to provide brief service without reducing capacity to provide extended services, the quantitative analysis of 16 programs with relatively comparable pre- and post-Hotline environments revealed a mixed picture. Six of the ten programs with budgets over \$1 million succeeded in increasing the level of brief services in the two post-Hotline years by more than 10 percent (all but one by much more than 10 percent) while remaining relatively stable (with an increase or less than 10 percent reduction) in their level of extended services. Among the seven programs for which more than two years of post-Hotline data are available, the four programs with funding of over \$1 million were able to repeat that success in the two most recent years. In contrast, no program with a budget of less than \$1 million was able to achieve this goal.

The value of the quantitative analysis is limited, given the limitations of the CSR data and the

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group of programs studied and the possibility that the results reflect factors other than the effect of the Hotline. For a program considering adopting a Hotline model, the most that can be claimed for this evidence is that it suggests that Hotlines *can* be effective, but that success is by no means guaranteed. All programs, but especially smaller ones, should be extremely careful in implementing a Hotline if they do not want to cut into their capacity for extended services.

2. All 44 executive directors and managers interviewed believed that the Hotline expanded the program's capacity, productivity, and accessibility.

The value of this evidence is limited because it reflects the views of people who have made the decision to adopt the Hotline model. However, it is significant that the study did not identify any feeling that adopting the Hotline had been a mistake. The key benefit of the Hotline was seen as its ability to make brief legal assistance available to more individuals with greater speed and convenience. The populations that are perceived to benefit the most are the elderly, the employed, rural residents, and individuals who have transportation or child care problems.

3. Although there are often some initial staff resentments and concerns about the decision to move to a Hotline system, these fade once the Hotline is implemented and staff experience its efficiencies.

By all accounts, start-up is challenging. However, most managers and executive directors reported that the entire staff eventually came to support the Hotline and appreciate its efficiencies.

4. Many different staffing arrangements and operational formats work well.

There was no consensus among the interviewees about the best staffing arrangement and operational format for a Hotline. Most programs were satisfied with their own system.

5. Future research should focus on client satisfaction and outcomes.

The difficulties and limitations associated with the quantitative analysis suggest that there would be little benefit in further attempts to measure

the effectiveness of Hotlines in comparison to traditional intake systems. However, analysis of the outcomes actually obtained for clients by Hotlines could provide some valuable guidance for how Hotlines are staffed and structured. Most of the research conducted so far has consisted of user satisfaction surveys with very low response rates, which are of little, if any, value in assessing the effectiveness of Hotlines. Little is known about whether clients (1) understand the advice they are given, (2) follow up on it, and (3) realize some satisfactory resolution to their problems.

Strengths of Hotlines

Managers and Executive Directors of programs with Hotlines cite more strengths than weaknesses to the approach. These include increased client accessibility; increased capacity, productivity, and efficiency; improved case tracking; improved consistency of case treatment; and increased opportunity for early intervention and prevention.

Challenges and Weaknesses of Hotlines

Despite their overall enthusiasm for Hotlines, interviewees admit there are some problems and limitations. Problems associated with Hotlines include reduced accessibility for people without telephones, high call volumes, an increased possibility of communication problems, and an increased possibility of giving brief services to cases needing extended care. Interviewees also acknowledged the possibility that Hotlines could divert resources away from extended services; however, most feel the benefits of increased accessibility offered by a Hotline outweigh the possible necessity of a moderate reduction in extended services. Others point out that a well-run program should be able to maintain, or even increase, its level of extended services with the addition of a Hotline.

Perceived Strengths and Weaknesses of Legal Hotlines

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The complete Phase I Report can be downloaded in pdf format from the Equal Justice website,

www.equaljustice.org

Information about Phase II of the Study, which will develop new data on client outcomes, is also avail-

Strengths

Increases accessibility

- reaches hard-to-serve and employed populations
- reduces client no-shows

Increases capacity and productivity

- ability to provide service to larger volumes

Increases efficiency

- eliminates lengthy application process for advice and brief service
- replaces lengthy in-person interview with brief telephone format
- streamlines referral process

Improves case tracking

- generates consistent information on cases
- leads to better identification of client needs and case trends

Improves consistency of case treatment

Encourages early intervention and prevention of legal problems.

Weaknesses

Reduces accessibility for people without telephones if walk-ins are limited

Requires time, money and staff that are not available for extended services

Generates a high call volume that may overwhelm the agency, lead to staff burn out, and generate more conflicts

Increases the possibility of communication problems

- significant issues may be missed
- difficulty reviewing documents
- literacy problems or lack of comprehension may be missed

Increases the possibility of giving brief services to cases needing extended care.

able on the site.

Telephone Technology Consultants and Services



The articles below were provided by the consultants and are published by the Legal Hotline Technical Assistance Project in keeping with its mission to inform legal hotline programs about available resources. The Project does not recommend any particular service or product.

An article about telephone consultants first appeared in the Legal Hotline Quarterly Winter 1997 issue. While the selection of a telephone system remains a critical element in legal hotline operation, the choices for programs have expanded greatly. Lower-volume programs may find that traditional systems with sufficient lines may serve their needs. High-volume hotlines may wish to purchase an Automated Call Distribution System, with sophisticated reporting functions, while other programs, particularly those with multi-site telephone advocates, may find outsourcing their phone service needs a good solution.

These decisions are often too complicated for hotline managers to make without expert guidance. Below are descriptions of the services provided by **S.R. Green & Associates** and **Tele-Lawyer, Inc.** The articles were written by staff at those companies at the request of the Legal Hotline Quarterly. Other consultants were contacted for information but did not respond. Both organizations have experience working with legal services programs in developing their telephone intake/legal hotline systems.



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S. R. Green & Associates is an independent management consulting firm specializing in the design of voice and data communications networks for businesses. We have been in practice since 1985. Steven R. Green, Principal and founder of S. R. Green & Associates, is a degree engineer of the University of Wisconsin, beginning practice in 1985 after 12 years of manufacturing engineering management.

We like to emphasize that we are *independent* telecommunications consultants and contract engineers and active members of the Society of Telecommunications Consultants. Subsequently, we work directly for clients either on a contract or time and materials basis and likewise are **not** receiving commissions or fees by representing hardware vendors or telecommunications service providers. This assures objectivity and that our efforts and recommendations are in the best interests of our clients. Additionally, our 'field of vision' is industry-wide and not limited to a group of manufacturers or service providers that we represent as we do not represent them, we represent you, the client.

S. R. Green & Associates began assisting Legal Services in October 1994, starting at San Fernando Valley Neighborhood Legal Services (SFVNLS) headquarters in Pacoima, CA., in October, 1994. The project consisted of obtaining expanded switching and voice processing systems and digital network services for a planned office expansion. SFVNLS also wished to utilize newly available technology (at newer lower costs) known as ACD for its intake process, (Automatic Call Distribution) to assist in queuing callers in the order of call receipt.

Congressional budget cuts to LSC and other Legal Service agencies in 1995-1996 brought other California based agencies to S. R. Green & Associ-

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ates for advice. Legal Services in general now sought to work smarter and more efficiently to process still more clients at lower operating costs. Clients now desired that as many or all of the 'tricks of the trade' be utilized to assure their survival. The advent of the hotline call center concept was one of the means to that end for some clients.

Other recent projects include the Legal Aid Foundation of Los Angeles, Inland Counties Legal Services, (Riverside, CA) the Legal Advocacy and Resource Center and Massachusetts Legal Services Corporation. (the latter both based in Boston, MA.) These organizations had us studying feasibility and/or building Intranets, and in some cases, constructing these networks so that the private line facilities deployed carry both voice and data, including Internet traffic.

A good example of one of the projects we have worked with is the Legal Aid Society of Orange County (LASOC). LASOC authorized us to execute all our recommendations to upgrade its telecommunications hardware and services as the Executive Director had decided to build a 'Hotline Call Center' in 1995. Telecommunications switching and voice processing hardware having ACD capabilities was purchased allowing us to deploy such services as Primary Rate ISDN, (PRI) Feature Group D wholesale services for '800' service, and DID (Direct-Inward-Dialing) to name a few. The end result now is that '800' calls to the 'Hotline' are delivered digitally at a cost 30% of retail and the ACD system assures that staffing is utilized in an optimal fashion. Most recently LASOC has received funding to initiate client services via public data kiosks (to the Internet) that will ultimately utilize still more advanced technologies such as IP Telephony, Computer Telephony Integration and Interactive Voice Response.

S. R. Green & Associates continues to serve numerous other Legal Service agencies in various telecommunications projects around the country to include wide area data and software defined network projects. We spoke at several 'Hotline' call center conferences in 1996, 1997 and 2000, highlighting how technological advancements in the telecommu-

nications service and equipment industries can allow Legal Services organizations to realize 'more bang for the buck', and utilize these advancements to compensate for staff losses due to budget cuts.

As mentioned above, the scope of work we provide Legal Services now includes the development of network and hardware infrastructure so as to utilize IP Telephony technology, (Internet Protocol) Computer Telephony Integration (CTI) and Interactive Voice Response. (IVR) As Legal Aid Society of Orange County has received funding recently, many other organizations providing Legal Services have requested feasibility studies to utilize such technology, still others are in the decision-making process regarding its utilization.

Such technologies will be utilized not only in conjunction with current or new telephone systems, but with existing LAN data networks so as to facilitate LAN/WAN construction. (Local Area Networks and Wide Area Networks) This is so that Legal Services organizations having multiple offices and /or wishing to have connectivity with other Legal Aid organizations in their state may have seamless, transparent, intelligent call and data routing. (*i.e.* for a universal case management database, universal Internet access/firewall and e-mail, among several other applications)

The elimination of considerable long distance usage will also be an end result, with vastly improved communication levels and person-to-person contact percentages plus a migration away from conventional public-switched-telephone-networks towards 'always on', flat rate connections among multiple office sites. (This arrangement would utilize the IP Telephony technology, with either Frame Relay or DSL/ATM as the telecommunications transport service.)

Again, this effort is also soon to include public data kiosks' access to Legal Aid Hotlines, with some intake effort hopefully to be undertaken by clients online with minimal or no Legal Aid full service advocate assistance, in some cases. This would work in a fashion similar to some Internet web sites that many may have observed recently that have 'call for

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immediate assistance' fields that when clicked, result in a return *live voice session* to the client. These requests are automatically routed to the same intake queue utilized by Legal Aid clients utilizing the conventional 'Hotline' telephone call methodology now utilized by many organizations.

Fee Structure for S.R. Green & Associates

Projects are bid on an individual basis after an interview with the client. Projects can be as small as 10 hours. The bids are based on an hourly rate in conjunction with a forecast of time necessary to complete the project, plus expenses.

Each year S.R. Green & Associates provides its services *pro bono*, up to the first 100 hours, to one non-for-profit client. After the first 100 hours, the organization is billed @ \$109 per hour. The client must pay all expenses. This year we are serving two clients in that capacity: Legal Services Corporation headquarters (DC) and the Sierra Club headquarters in San Francisco. *Applicants may apply for 2001.*

A long list of legal services programs S.R. Green & Associates has worked with is available upon request.



Know your Legal Hotline Resources

www.equaljustice.org/hotline1

At this site you can access:

- **The latest developments in the legal hotline world such as the full report of the Phase I Hotline Outcomes Assessment study**
- **ABA draft rules affecting hotlines**
- **A searchable directory of legal hotlines**
- **Current and recent issues of the Legal Hotline Quarterly**
- **Current and recent issues of the Legal Hotline Bulletin**
- **An interactive web board. To be added to the Legal Hotline Managers web board please call or email the Technical Assistance Project**
- **Detailed profiles on the operations of numerous hotlines**

[www. povertylaw.org/hotline/hotline](http://www.povertylaw.org/hotline/hotline)

At this site you can access or order in hard copy:

- **State-specific Frequently Asked Questions and Self-Help Pamphlets**
- **Sample client satisfaction surveys**
- **Successful AoA hotline grant proposals**
- **Back issues of the Legal Hotline Quarterly**
- **Hotline procedural manuals and much more.**

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OUTSOURCING AS AN ALTERNATIVE FOR HOTLINE MANAGEMENT

“Modern technology will empower the average consumer to regain a sense of confidence in the legal process”, says Michael Cane, CEO of Tele-Lawyer, Inc.

Tele-Lawyer, Inc., America’s oldest and most honored commercial legal advice and information phone service, offers hotline managers the opportunity to achieve maximum efficiencies at a lower cost.

Established in 1989, Tele-Lawyer, Inc. was the first pay-as-you-go legal information and advice phone service. As originally conceived, the company provided consumers quick, convenient access to legal advice and information over the phone. After 11 years of perfecting the learning curve, Tele-Lawyer now offers turnkey solutions utilizing the latest technologies available.

Tele-Lawyer’s hotline services provide legal hotline managers with customized, low-cost solutions to increase functionality with existing hardware and software. Since no common platform exists within the industry, Tele-Lawyer has created hotline services that will interact with various platforms without the need for costly upgrades or equipment investment.

Through its hotline services, Tele-Lawyer provides a gateway for participating organizations. Its services include: automated call routing; live operator call screening and routing; and live operator intake using Tele-Lawyer’s database intake system and its Virtual Private Internet Network. Additional services are available.

Generally, fees are structured with a one-time set-up fee to consult, develop and implement the sys-

tem; a monthly service/maintenance fee; and a per-minute fee. The range of fees depends on the services selected.

Depending upon the services selected by the hotline manager, clients of an organization call a toll-free 800 number and are greeted by a trained operator at Tele-Lawyer’s state-of-the-art call center. The operator gathers information about the caller. The intake information is then matched to criteria established by the organization and either routed to the appropriate attorney or provided with other options for legal service. Hotline managers of participating organizations create the guidelines through which calls are routed and/or handled.

Tele-Lawyer can work with an organization’s existing attorneys without causing them to spend needless time qualifying a caller. Using Tele-Lawyer’s experienced operators and Virtual Private Internet Network, attorneys receive the client intake information before they speak with the client and after the operators have performed conflicts checks.

An area of concern for many hotline service providers is the needed assistance of pro-bono work from area attorneys to complement existing staff attorneys. As Mr. Cane puts it, “A majority of attorneys around the country are more than willing to donate their time to pro-bono work. That has never been the issue. The problems of the past have been logistical. It is not easy for attorneys to leave the office for hours at a time, but Tele-Lawyer provides attorneys with the flexibility of receiving client calls in their own office thereby alleviating time and travel burdens.” This flexibility will allow attorneys within a community to contribute pro-bono services to legal service providers that they may not have in the past.

The hotline services, although outsourced, interact with an organization’s existing equipment and software. No expensive equipment investment is necessary. Elliot Schear, Vice President of Marketing for Tele-Lawyer explains, “This system creates a win-win situation because it allows legal service providers to tap into the latest technology without having to worry about upgrades or equipment failure.” Software upgrades become a thing of the past. Imag-

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ine attorneys having the ability to receive the full information portfolio of a caller in real time before ever speaking with the client.

The benefits of Tele-Lawyer's hotline services include:

1. **Ease of Set Up** – Because Tele-Lawyer's systems are in place, legal service providers will not need to coordinate the installation of highly technical phone equipment, the set up of an operator center, or a beta test of new case management software, not to mention the myriad of other start up requirements for a centralized system. These factors also mean that the hotline services can be expanded to additional agencies with minimal time delay and cost.
2. **Quicker Start Up** – The hotline service can be up and operational in a fraction of the time required to develop software and set up hotline operations from scratch by using Tele-Lawyer's existing systems.
3. **Flexibility in Operations** – Hotline programs that buy equipment and develop proprietary software create structures and specifications that become a backbone of operations for a long period of time. Most start up hotlines require regular modifications to operations. Outsourcing saves organizations the time and expense of this frustrating process.
4. **Lower Operating Costs** - The operation of a sophisticated call center utilizing high-end phone equipment and a leading-edge wide area network involves numerous operating costs that are not readily evident during the design and start up phases. These costs include the retention of technical personnel necessary for maintenance and support of equipment and software as well as the training and management of an operator staff. Because these and other costs are fixed, there are economies of scale and operating efficiencies that arise from spreading these ex-

penses out over a larger number of calls. Tele-Lawyer offers these benefits because it has already expended the cost of phone equipment and software development on its own programs as well as in the services it has provided to others.

5. **A Self-Sustaining Mechanism** – Tele-Lawyer offers organizations the ability to integrate a self-sustaining function into its hotline operations at no cost and with no negative effects on the hotline design specifications. During the operation of almost all legal service hotlines, there are a large number of non-qualifying callers – people who need legal help, but do not qualify for the hotline's services. This occurs either because the callers are over income limits or the nature of their question or need is not addressed by the service. Tele-Lawyer can direct such callers to other services that can support these non-qualifying callers and the organization will receive a portion of the proceeds of any income generated from the outside service. This would result in two enhanced benefits: (1) providing needed services where none would otherwise have been offered; (2) generating an offsetting funding source to reduce or even eliminate the cost of non-profit hotline operations.
6. **Experienced Management and Staff** – Legal service providers will instantly gain the experience from Tele-Lawyer's 11 years of managing successful legal hotlines.
7. **Security** – The security and confidentiality of client data is a key part of Tele-Lawyer's virtual private network design. All access is strictly limited by pass code and client code requirement. In addition, security of data also means protection of the data from virus invasion, corruption and equipment failure. Tele-Lawyer maintains redundant systems on-line, with 128-bit encryption, that not only protect the data, but also ensures minimum downtime in the event of a problem.

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The information technology era creates unique opportunities for low to moderate income clients to take advantage of legal advocacy. Legal service providers to these clients have the same opportunity to outsource several processes and make effective and efficient legal advocacy available to all callers. Tele-Lawyer consultants are available at:

1-800-TELE-LAW (835-3529).

The First Annual National Aging and Law Conference

Aging and Legal Services

United for the New Millennium

will take place October 5-7, 2000 at

the Crystal City Marriott, Arlington, VA. The cost for legal services and aging advocates is \$200.00 private attorneys \$250.

The Conference is sponsored by AARP Foundation. A conference brochure is available by calling:

Nadine Latimore at 202-434-2118.

Websites of Interest

www.nscs.dni.us

National Center for State Courts

This site lets you link to the websites for numerous state and federal courts as well as some international courts.

www.capweb.net

CapWeb, the Internet Guide to Members of Congress.

The site provides contact information for every member of Congress including e-mail addresses and staff member names. It also lists committee assignments.

www.va.gov/vbs

Federal Benefits for Veterans and Dependents provides comprehensive information on pensions, burial and health care benefits. The site has an e-mail link that lets you make inquiries.

www.aoa.gov/aoa/pages/state

This page on the Administration on Aging website lists complete contact information for all the state agencies on aging.

www.benefitslink

BenefitsLink, the "Employee Benefits Web Site." It provides information and resources on a wide range of employee benefits such as 401 (k) plans, pensions, health insurance and COBRA.

From the Frontline

By Carol Matthews*

(Italics indicate words and phrases quoted from the ABA Committee on Delivery of Legal Services April, 2000 draft of Standards for the Operation of a Telephone Hotline)

ABA ISSUES HOTLINE JOB DISCRPTION

I have been reading the newly released ABA standards for hotlines with a growing sense of amazement. Until now, I had thought that only those of us who actually man the hotlines realized how incredibly talented we are, so I am delighted to see that the ABA committee understands this very well.

The Committee believes hotline personnel need very good people skills. We must recognize that callers to the hotline may be facing *stressful personal crises* and may be *tense and confused*. Though untrained in mental health screening we must spot those callers who have *limitations in their abilities and competencies and may not have the capacity to carry out [advice] or understand the consequences of their actions*. In screening callers for eligibility and conflicts of interest we *advance the core values of the legal profession when we assure callers of the confidentiality of the ... process and impress upon callers the need for truthful and candid disclosures* all the while being careful not to let the caller give us any *details about the legal issue* prompting the call. If we cannot serve the caller we must refuse help with a *high degree of sensitivity* so as not to *anger the caller*.

If we can assist the client, we do so with a high degree of efficiency. Although we must never *curtail the length of the call nor adjust, conform, or compromise [our advice] because other callers are waiting*, we nevertheless must not *unduly extend the length of the call or allow the caller to do so*. We accomplish this by *expeditiously screening* clients, avoiding *small talk*, and concentrating our

**Carol Matthews is a hotline attorney at Legal Counsel for the Elderly in Washington, D.C.*

efforts on *fast paced problem solving* using our skills to *quickly probe for relevant facts*. While we

keep *intrusiveness to a minimum* and do not *unnecessarily inquire into a caller's personal affairs or preferences*, we have the *responsibility to gather sufficient information to formulate a fully competent assessment of the situation* while at all times we *maintain [our] independence of professional judgment*.

Armed with all the relevant facts, (and none of the irrelevant facts because we avoided *unconnected small talk and other forms of non-relevant conversation*.) we *endeavor to provide quick responses to caller inquiries with fact specific legal advice to callers, delineating alternative causes of action and a range of choices*. In addition to the existing legal problems we *should help the caller identify... potential future [legal] problems and make plans to avoid them*. Naturally, we must be able to *identify and respond to emergencies* and *recognize the relative complexities of legal issues*.

It is not enough that we know the law and are *trained in client relations, call handling procedures, problem solving techniques, recognition of the limitations of the hotline... and the use of all office systems and resources*, and in particular, *thoroughly understand the technological abilities and limitations in place[at our own] hotline*, but we are expected to know everyone else's business as well. We are responsible for referring clients to other legal services and providing *callers with information about these resources when it becomes apparent that the caller will benefit from further representation*. If legal assistance is not enough, we also *maintain information about non-legal services ... and refer callers to them when it appears the resources would assist with the callers' problem*.

The ABA committee clearly expects hotlines to be staffed by lawyers with such diverse talents as to make one wonder where to find them. No need to look very far. We are the ones with the head sets on, practicing our underpaid craft with *courtesy, patience and clarity*.

TARGETING HARD TO REACH POPULATIONS

By

*Deb House, Co-Project Director, Tennessee Elder
Law Hotline*



INTRODUCTION

A constant challenge for providers of services to seniors is reaching the target population. The hard-to-reach senior target population in Tennessee is heavily rural. Senior hotlines in rural areas have typically grappled with low call volume while those in states with large urban populations have had the opposite problem. At the outset our outreach efforts were directed toward making sure the rural callers would utilize the hotline in sufficient numbers. This is particularly true in the context of a senior hotline since the program generally does not have advocates in the field to carry the message. For this reason, it is very important that elder hotlines develop a working strategy for outreach to hard to reach populations.

The Tennessee Elder Law Hotline (TELH) is a project of Southeast Tennessee Legal Services (STLS) with partial funding provided by the Department of Health and Human Services, Administration on Aging. TELH has enjoyed some degree of success in its endeavor to reach all senior citizens in Tennessee. From the time the hotline was first conceived outreach was a vital part of the overall plan. Not only was outreach contemplated in drafting the initial grant proposal, various methods were discussed with the advisory board at its initial meetings. Planning an appropriately timed outreach strategy is critical. When implementing a new program, such as a senior hotline, the initial publicity push is key. The efforts cannot stop at that point, no matter how successful the outcome. Initial efforts must be evaluated and new and innovative methods must be incorporated in order to keep the process active. Outreach is an ongoing and vital part of the overall hotline

project. It deserves the attention any other aspect of project would command.

PLANNING

Planning the outreach effort was an integral part of the initial planning phase of the TELH. The process included the staff of TELH and its various statewide partners in the project: the Tennessee Commission on Aging, the Tennessee Bar Association, the Tennessee Legal Services providers and representatives of other interested agencies. The knowledge and experience of the partners was used not only in determining target populations but also in the design of the methods and products used in the outreach effort. Although anyone working in this area had a good idea of what they *think* will work, those who are in the field working with a particular population tend to *know* what will work. For instance, TELH thought that television outreach was a key tool for reaching the senior population in Tennessee. While this is true and the partners supported the idea, it was pointed out that many seniors, particularly in rural areas, and those who do not have cable television, frequently listen to the radio. As a result, a radio campaign, including appearances on call-in talk shows, was incorporated into the overall outreach plan. When working with partners is it important not to be tied to your original outreach strategy document. Be flexible in learning from others who have first hand knowledge in the field.

Perhaps the first consideration in the planning process is to identify the audience. While hard to reach populations are always of particular interest to service providers, outreach is intended for many different audiences. On a broad scale, the two primary consumers of outreach materials are the intended clients of the project and the larger organizations around the state who will serve as "indirect outreach points" since they will have contact with potential consumers of the service. TELH identified many of these "indirect" targets: local clubs, health departments, Area Agencies on Aging, Social Security Administration offices, churches, etc. A different set of outreach materials was targeted to these organizations than were targeted to the primary consumers of

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the hotline service.

Another consideration in planning an effective outreach strategy is cost. Hotlines generally run on a very limited budget. Certain outreach tools can be expensive. A key here is obtaining services free of charge or at a greatly reduced cost. TELH was fortunate to be able to use the talents of the development director of STLS in its efforts to obtain reduced cost services. Her services were invaluable. An initial step in the outreach planning process should be the identification of key persons and/or organizations that can help the program obtain these reduced cost services. Outreach is something that **MUST** be budgeted for. It is impossible to say how much money should be planned for the initial push; that will depend on the type of efforts planned and the partners willing to cooperate. Once the initial outreach is complete, however, the budget item is not exhausted. Outreach must be factored in all budget cycles. Outreach is not something that happens haphazardly so the costs are constant and ongoing. Although pro bono contributions are out there, a prudent program will not count on them for their entire outreach effort.

Effective outreach strategies can also serve to cultivate funding partners. Funders are interested in what they can see. A visible hotline program with good outreach strategies will be a key selling point when approaching potential partners to seek resources to grow the project.

IMPLEMENTATION

When implementing any outreach strategy, “timing *is* everything”. Timing involves not only planning to get outreach materials produced and appearances scheduled, it also is very important to time the introduction of a particular piece of outreach material into the community. Project start up is the logical time to roll out many outreach products. What happens, though, if **ALL** of your outreach materials saturate the market at once? While the initial response may be great, you must consider one month and even one year down the road. Remember, too, that the first month or more of operation of a tele-

phone hotline will be hectic for many reasons: new staff, new equipment, new ways to provide a service, etc. Do you really want an extremely large volume of calls the first few weeks while the learning curve is still high? TELH timed its outreach methods, sometimes intentionally, sometimes by accident. A discussion of the various methods employed by TELH and other projects is held below. Suffice it to say that what worked at start up was different from what worked at month four and now that the project is well into its second year new strategies are being developed while some of the old ones are being re-used.

EVALUATION

Whatever outreach strategies are employed, evaluation of the process, the product and the result are critical. Keeping in mind what results you would like to measure. For instance, TELH has a case management system that allows the intake staff to record how the caller learned of the service. This allows management to track the number of callers reached by various outreach methods. Just as outreach itself is an ongoing process, so should be the evaluation. Reflection leads to motivation to continue and improvement of the methods. Evaluation should occur at a minimum after the initial outreach blitz and when any new methods are incorporated into the overall strategy. Annual evaluation of the overall process is also important. Evaluation should not only come not from clients and from within the project but also from project partners who see first hand the results of the services provided. To this end, TELH is currently developing an instrument to collect data from various community partners, not only about the quality of services offered but also the effectiveness of the outreach plan. This instrument will also collect ideas for future outreach efforts. Since many of these partners were consulted on the front end, a follow up should prove to be particularly effective.

INNOVATIVE METHODS

TELH has used a variety of methods to target its hard to reach populations, some successful some not. Below are a variety of the methods used, along

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with comments.

Poster: Through a cooperative effort of Senior Neighbors in Chattanooga and local school children artwork was developed to adorn the poster. A local design artist donated services to lay out the poster and a local printer provided services at a greatly reduced rate. The result was a colorful poster (suitable for framing!) that was distributed statewide to approximately 1000 locations. Bulk mail rates were used to further reduce the cost of this effort. The STLS development director coordinated the entire poster project. To this day TELH receives calls from all around the state requesting additional posters.

Media Blitz: The media campaign at the beginning of the project involved several aspects. A press release was sent to all of the print media in the state. The STLS development director obtained a mailing list of the print media and developed the press release. A clipping service provided data on the number of newspapers which ran the release. Television stations in the local Chattanooga market were also targeted. Hotline staff appeared on a variety of morning and evening news shows to announce the kick off of the Hotline. Budget considerations precluded TELH staff from traveling statewide to make appearances in the other media markets, although evaluation of this phase of the effort revealed that other legal service partners around the state could have served this function. TELH staff also appeared on radio talk shows during the first few weeks of Hotline operation.

Media Follow-up: Now that TELH has more than a year of operation under its belt it is time for another media blitz. A press release is currently being drafted and television as well as radio appearances are contemplated. TELH will call on partners around the state to use their contacts in the local markets to further this effort.

Brochure: the STLS community education coordinator developed a brochure describing the hotline services and how to access the service. Several thousands of the brochures have been printed and distributed throughout the state.

Business Cards: Business cards printed with the phone number and hours of operation of TELH were obtained. Whenever TELH or STLS staff make a community presentation the cards are distributed. They are also provided to key sites where seniors might see them, such as local senior centers.

Phone Bill Insert: One of the most innovative and successful outreach tools has been an insert in every phone bill in Tennessee announcing the availability of the hotline, along with the hours of operation and phone number. This successful project was accomplished through a partnership with Bell South who agreed to print one page of their monthly phone bill insert with the information at no cost to TELH. A word of caution: should you pursue a targeted method calculated to reach large numbers of potential clients, be prepared for the calls! The phone bill insert doubled the number of incoming calls from an average of 6.5 to 12.45 calls per day. The effect of this effort lasted well after the initial spike with calls averaging 10.45 per day in the months following the inserts. Additional STLS staff were added to the hotline on a temporary basis to handle the volume.

Time/Temperature Announcement: A local bank sponsors the telephone time/temperature recording and has agreed to promote the hotline service for a limited time as part of its announcement. If this proves successful in the Chattanooga area similar services will be contacted in other counties in the state.

Public Speaking Engagements: TELH has made an effort to be invited to as many organizations as possible to speak about the

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wonderful service offered by TELH. Although this may not reach the target consumer of the hotline service, this “indirect” outreach has the potential to reach great numbers of potential clients.

Public Service Announcement Video: TELH has recently completed a PSA video for distribution to television media throughout Tennessee. The video is 30 seconds long with voice over provided by a local television celebrity and video shots of TELH staff and a senior member of the STLS board. A local television station donated their time and production facilities to produce and edit the video. The only cost to TELH will be copying and distribution to the various television stations around the state. A similar radio PSA is planned.

Fact Sheet/Talking Points: As part of its speaking campaign, TELH developed a fact sheet along with talking points to be distributed to those interested in carrying the word about the project to additional groups. This was particularly effective when addressing the Area Agency on Aging statewide meeting, as that group was eager to pass the word along about the important services offered by TELH.

TENNESSEE ELDER LAW HOTLINE TALKING POINTS FOR PARTNERS

- The Tennessee Elder Law Hotline provides free legal advice, brief service and referrals to all Tennessee residents age 60 and above
- Legal advice and brief service are of a nature that the caller’s need can be satisfied through a simple telephone conversation or by reviewing documents and correspondence without the client having to come to an office
- The Hotline is a joint effort of Southeast Tennessee Legal Services and a statewide coalition of senior citizens advocates
- The Hotline is staffed by attorneys experienced in elder law issues
- When calling the Hotline please be prepared to discuss in detail your legal questions and have pen and paper ready to take down additional information
- The Hotline does not see clients in person, it is strictly a

telephone service

- For individuals needing extended legal representation beyond advice or brief service an attempt will be made to refer the person to a legal services program (if income eligible), a Title III attorney or some other service in their local area
- For callers with questions of a non legal nature referrals are made to the local Area Agency on Aging, who can then assist them with their needs
- The hours of operation for the Tennessee Elder Law Hotline are 9:00am to noon and 1:00 to 4:00pm *Eastern Standard Time*
- The Tennessee Elder Law Hotline can be reached through a toll free number, 1-800-572-7457
- Callers in the Chattanooga/Cleveland area are asked to call the local number, 756-0128
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CONCLUSION

Outreach is a key component of any service delivery plan. Targeting those hardest to reach and most underserved is vital. A coordinated outreach strategy must be an integral part of any service plan. The target population, cost and timing are primary considerations. Partners must be cultivated to help carry the message. That type of indirect outreach can prove highly effective. Be innovative and open to new ideas. Evaluate what has been done, not only to determine success but how to improve the product. While it may be true that “if you build it they will come”, the comers are those with an interest or knowledge in the product. It takes more than the building to keep the interest and draw new audiences. Ongoing outreach will enable the project to remain vital for many years to come.

