

## 2005 AoA Title IV Legal Assistance Grants



In September, the Administration on Aging announced the grantees for its Fiscal 2005 Legal Assistance Grants. These awards average \$100,000 per year and are only for two years in this cycle; typically they have been for three year periods. These funds derive from the Older American Act Title IV Training, Research, and Discretionary Projects appropriations. Title IV funds have helped to establish statewide senior legal hotlines in 16 states and Puerto Rico in the past. The 2005 awards will expand the model to four new states and, along with states that have launched statewide senior legal hotlines with other funds, bring the total number of statewide senior legal hotlines to 28 including the District of Columbia and Puerto Rico.

This year's competition drew many excellent proposals from 28 programs, both established senior statewide hotlines and programs seeking to start a senior hotline or related delivery innovation. Historically, appropriations for this section of Title IV have only been sufficient to fund a fraction of the proposals. This year, seven proposals were funded for a two year period.

The four grantees that are new to the statewide senior legal hotline family are:

- **FL : Bay Area Legal Services  
Florida Senior Legal Helpline**

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Technical Support for Legal Hotlines Project  
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*Shoshanna Ehrlich, Editor*

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The AARP Foundation is AARP's affiliated charity. Foundation programs provide security, protection and empowerment for older persons in need. Low-income older workers receive the job training and placement they need to re-join the workforce. Free tax preparation is provided for low- and moderate-income individuals, with special attention to those 60 and older. The Foundation's litigation staff protects the legal rights of older Americans in critical health, long-term care, consumer and employment situations. Additional programs provide information, education and services to ensure that people over 50 lead lives of independence, dignity and purpose. Foundation programs are funded by grants, tax-deductible contributions and AARP.

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- .. **NE: Legal Aid of Nebraska  
ElderAccessLine**
- .. **NY: Legal Services for the Elderly  
New York Seniors  
Legal Assistance Project**
- .. **VT: Vermont Legal Aid  
Coordinated Legal Assistance to  
Seniors**

***Established Senior Statewide Legal Hotlines  
awardees are:***

- ◆ **PA: Philadelphia SeniorLAW Center  
SeniorLAW Helpline**
- .. **CT: Connecticut Legal Services  
Consumer Law Project for Elders**
- .. **MI: Elder Law of Michigan,  
Legal Hotline for Michigan Seniors**

The Philadelphia SeniorLaw Center has been operating a statewide senior legal hotline for the past two years but this is its first cycle of Title IV funds.

The CT and MI hotlines are the only two of the many established programs that submitted proposals to receive a new cycle of Title IV funds for innovations to their hotline projects. Several of the existing senior hotlines that did not receive new grants in this competition have had to decrease staff and otherwise scale back operations. However, all the hotlines listed in the Senior Legal Hotline Directory, [www.legalhotlines.org](http://www.legalhotlines.org), are still operating to serve persons over 60 years of age.

***Program Nutshells:***

**New Programs**



**Bay Area Legal Services** in Tampa, FL, will use the grant to establish the new **Florida Senior Legal Helpline**.<sup>1</sup>

1.The Legal Hotline for Older Floridians, housed at Legal Services or Greater Miami, operated with a seed grant from AARP between 1989-1995. Permanent funding could not be found once the AARP grant ended and the Legal Hotline for Older Floridians closed.

The goal of the Helpline will be to close the gap in services by providing elderly Florida residents with a convenient point of entry into the legal services system.

Clients will call a statewide toll-free number. Helpline screeners will answer the calls initially to determine the nature of the question and the client's location. The screener will then consult a newly developed "referral matrix" to determine whether the caller should be referred directly to a local provider in the caller's county of residence or scheduled for a call back appointment with a Helpline attorney or paralegal. The "referral matrix" will be developed by a statewide partnership of legal providers and aging network agencies and is the key innovation to this project. The matrix will allow the Helpline to provide high quality legal advice and targeted referral services applicants who live in counties with limited resources for seniors. The matrix will also enable the Helpline to avoid duplication of services by directing callers to appropriate programs in their local communities that are sufficiently staffed and funded to provide a full range of representation to seniors for relevant issues.



**NE: Legal Aid of Nebraska (NLA)** in Omaha, will use the funds to set up the **ElderAccessLine**. The new project will serve over age 60 callers statewide. ElderAccessLine is an enhancement of NLA's existing statewide hotline which provides access to legal and social services to low income callers. The ElderAccessLine will employ one full time attorney and full-time paralegal. The paralegal will screen the callers for eligibility and problem description and transfer the call to the **ElderAccessLine** attorney or make an appointment for a call back if the attorney is not immediately available. Other enhancements will include developing referral methods from ElderLawAccess to Title IIIB and other providers.

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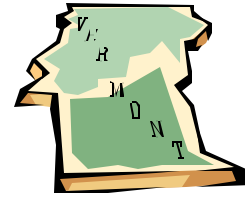
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**NY: Legal Services for the Elderly (LSE) and City Bar Justice Center (CBJC)**, in New York City, are partnering to establish the statewide **New York Seniors Legal Assistance Project (NYLSA)**. These organizations will combine their expertise in serving seniors (LSE) and operating a legal hotline (CBJC). **NYLSA** will allow all over age 60 seniors in New York State to call a toll free number for legal assistance. **NYLSA** will also take requests for services on the internet. **NYLSA** will be the first central point of access for legal assistance throughout the state. Three levels of services will be offered:

- Callers in priority areas which include: income security, health care, advance directives, nursing home transition, and consumer, will receive legal advice and brief services including document review, writing letters, drafting or completing forms, and phone calls, if needed;
- Callers with non priority areas will receive individualized legal advices and preprinted materials and forms;
- Medicare Part D Extra Help appeals.

Clients will select problem types on the telephone and be directed to either CBJC or LSE depending on the problem or language spoken. The Project will also create Senior LawHelp, an expansion of LawHelp.org/NY, an innovative online database for finding free legal assistance and information about legal rights for low income residents. Senior LawHelp will incorporate LSE's county by county searchable database of agencies services seniors.



**VT: Vermont Legal Aid (VLA) Coordinated Legal Assistance to Seniors V L A**, located in Burlington, is Vermont's full service legal services provider. It coordinates with a separate LSC funded hotline, **Legal Services Law Line of Vermont** (Law Line) which provides statewide telephone advice. VLA also operates the Senior Citizens Law Project (SCLP). Low income, elderly, and disabled Vermonters access all these components through a statewide toll free number.

VLA will use the grant to expand services to seniors and unify service delivery to seniors currently handled by Legal Services Law Line of Vermont (low income advice and brief services), VLA's Senior Citizens Law Project (SCLP) and 5 local Area Agencies on Aging. Enhancements to service include:

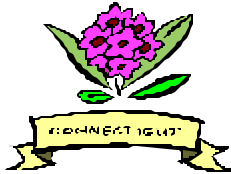
- Integration of intake with the Senior HelpLine. The Senior HelpLine is run by the Areas Agencies on Aging and takes calls from seniors with a broad range of questions including those looking for legal assistance. AAA case managers will be able to refer cases directly to VLA rather than giving the client another too free number to call. VLA will either transmit the case to Law Line to contact the client with legal advice, or assign the case to a SCLP staff attorney for representation or brief service;
  - Development of an online remote intake module which will allow Senior HelpLine and AAA staff to directly submit new cases for service at VLA and Law Line through the internet;
  - Establishment of free senior half-day legal advice clinics in communities around the state;
  - Expansion of Vermont Law Help website to cover elder law issues.

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### ***Established Senior Legal Hotlines***

Programs in MI, PA, and CT, using their established legal hotlines as a platform, have been envisioned the following innovations and enhancements to their hotlines.



**CT: Connecticut Legal Services'** Willimantic office houses its **Consumer Law Project for Elders (CLPE)**. The innovations proposed for CLPE include:

- The creation of a Mobile Law Unit (MLU) Locations for MLU visits will be guided by GIS software to determine which areas with concentrations of low income, minority, or homebound seniors have disproportionately low CLPE calls; the MLU will provide consumer law presentations on identifying and avoiding consumer problems as well as onsite office hours for client interviews;
- Increased services to homebound seniors. CLPE will provide the homecare case managers of Connecticut's Access Agencies (home health care agencies that contract with the Department of Social Services Alternative Care Unit to serve the State's low-income homebound seniors) with a screening and referral tool for identifying consumer law problems. The homecare case managers will make direct referral of clients by fax to CLPE for legal assistance;
- Medicare Part D Screening of all callers and direct referrals of seniors eligible for Extra Help to State's SHIP program;
- Additional staff to handle more CLPE cases;
- Trainings for Area Agencies on Aging and other partners on changes in consumer law and updates on predatory practices.



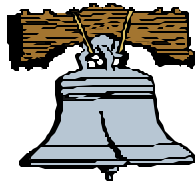
**MI- Elder Law of Michigan (ELM)** located in Lansing, and its Legal Hotline for Michigan Seniors (LHMS), holds the record for the number of winning Title IV legal assistance proposals. This is the third Title IV grant cycle for ELM. Additional services will include:

- Increased number of cases handled by LHMS;
- Training and materials for first responders – people at the local level who are likely to learn of a crime against a senior or inappropriate guardianships;
- Screening LHMS callers for advanced directives and Medicare Part D enrollment. LHMS will work with Cooley Law School's Sixty Plus Elder Law Clinic to determine if its advance directives templates can be adapted for the LHMS website. Low income clients will be able to complete statutory advanced directives over the phone with hotline attorneys and receive the completed forms by mail for execution;
- Expansion of its current Brief Services Unit, which focuses on debt protection, to provide assistance with identity theft, remedies for financial exploitation, and advanced directives. The BSU is staffed with law student volunteers, interns and workshop study students, under the supervision of LHMS attorneys.
- Translation of legal information materials into Arabic (third most widely spoken language in Michigan) and partnership with Arab Community Center for Economic Social Services;
- Production of a report on measures currently used in all 50 states to prevent and respond to elder abuse;
- Creation of **Integrated V.I.R.T.U.A.L (Visibly Increase Relationships to Unify Access to Legal Services) Communities.**

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The LHMS website, [www.legalhotlineonline.org](http://www.legalhotlineonline.org), and <http://MichiganLegalAid.org>, the Michigan Bar and legal service providers' portal will serve as gateways to Integrated V.I.R.T.U.A.L Communities. The project will feature (1) online training, (2) new legal information for a variety of audiences, (3) moderated internet discussions groups for professionals that work with seniors led by LHMS attorneys, and (4) an online early warning system for reporting financial crimes against the elderly.



**PA: SeniorLAW Center  
SeniorLAW Helpline**

Philadelphia-based SeniorLaw Center, launched a statewide senior law helpline in December 2003 with a one time start up grant from AARP Foundation. The Title IV funding will enable SeniorLaw Helpline to:

- Expand hours and staff for the Helpline;
- Enhance Helpline services including extensive legal research, follow-up written materials and client “coaching” services, follow-up phone calls;
- Provide additional multi-lingual capacity;
- Perform extensive outreach and education to faith based communities, diverse cultures and limited English proficiency elders;
- Develop an interactive educational SeniorLAW website and elder law e-newsletter for Helpline clients, seniors centers and AAAs, etc.;
- Create a Consumer Law Pro Bono Attorney Panel for Helpline clients;
- Hold “Serving Seniors” training for other legal professionals;
- Compile a Legal Resources Directory for Older Pennsylvanians.

**MARK YOUR CALENDAR!**

**Sixth Annual  
National  
Aging and Law  
Conference**



**April 20-23, 2006**

**Double Tree Hotel,  
Arlington, VA**

**[www.aarp.org/nltp](http://www.aarp.org/nltp)**

## **2005 LCE Brief Services Unit**

**Evaluation** Report Prepared by

Anita Stowell-Ritter\*

### **Background**

Legal Counsel for the Elderly (LCE) was established in 1975 and is the primary provider of legal services and advocacy for older people in the District of Columbia. The D.C. Law Office provides a full range of free legal services to D.C. residents age 60 and older.

In late 2001, LCE launched an innovative intervention program called the Brief Services Unit Program (BSU). This program is operated in conjunction with its Hotline program, but extends the capacity of LCE to provide more in-depth case work. Cases referred from the Hotline to the BSU are usually those cases that require more in-depth legal work such as letter writing, completing forms, making calls on a client's behalf, or factual development before the client's problem can be resolved.

The staffing resources of the BSU include a staff attorney and a paralegal as well as a core group of skilled and staff-supervised volunteers. The program volunteers conduct fact-finding investigations, write letters, and develop cases. Experienced volunteers, especially those who are attorneys, can draft pleadings, conduct negotiations with third parties, and conduct legal research. There are currently 25 active volunteers.

On July 28, 2005, 30 volunteers who have been engaged in the BSU during the past year were contacted and asked to complete a brief questionnaire on their experiences as a volunteer. They were asked to reflect on the following items:

- Overall satisfaction with their volunteer experience;
- What they liked most and least about their experience;
- Rating of the quality of services provided to clients;
- Training needs.

The surveys were mailed to the volunteers by LCE staff. Those volunteers who had not returned their surveys by August 22<sup>nd</sup>, the original cut-off date, were telephoned and asked to complete the survey.

Of the 30 volunteers who received the survey, 23 completed it by August 31, 2005, the final cut-off date for the survey. The response rate for the survey is 77 percent.

An annotated questionnaire that provides responses in both percentages and respondent numbers is included in Appendix I of this report.

### **Highlights**

- All volunteers express satisfaction with the BSU volunteer experience;
- Most volunteers are engaged in multiple activities that include completion of applications and forms, client interviews, and document reviews;
- All volunteers express satisfaction with the supervision they received during the project;
- Interaction with clients is the aspect of their jobs that volunteers like the most;
- Those aspects of the job volunteers say they like the least include specific job responsibilities, inadequate facilities, and some operational and communications issues;
- A majority of volunteers say they have participated in training programs. Slightly more than one in three says that additional training could improve the efficient operation of the program. Key training opportunities include orientation to administrative programs, materials and resources; issue training; and computer training;
- All but one volunteer reports that the quality of services provided to clients is very good or good.

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**Detailed Findings**

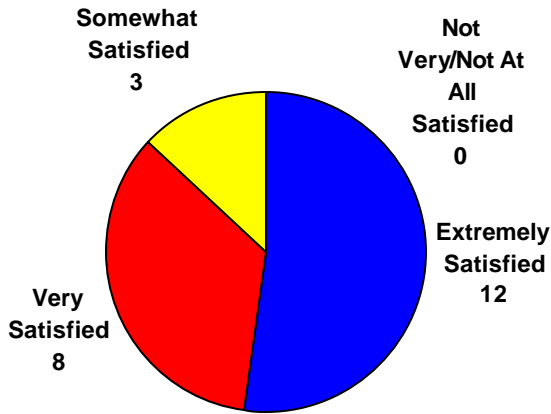
**The vast majority of volunteers rate the quality of services provided to clients as very good or good.**

Respondents were asked to rate their opinion of the quality of services clients received from the Brief Services Unit (BSU) program. Nearly all respondents indicate the quality is either very good (13) or good (9). Only one respondent reports that the quality of the services is fair.

**All BSU volunteers report that they are satisfied with their experience in the program.**

Volunteers were asked to rate their level of satisfaction with their experience in the BSU program. While all respondents report they are satisfied with their experience, more than half say they are extremely satisfied.

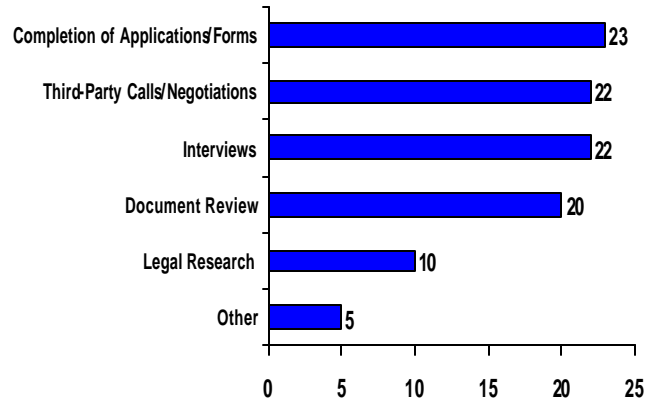
**Satisfaction with Volunteer Experience**  
(N=23)



**Most volunteers indicate they have multiple responsibilities with the BSU Program.**

All volunteers report they have responsibility for completion of applications and forms. More than nine in ten say they have been involved with interviews and third-party calls and simple negotiations. Less than half say they were engaged in legal research.

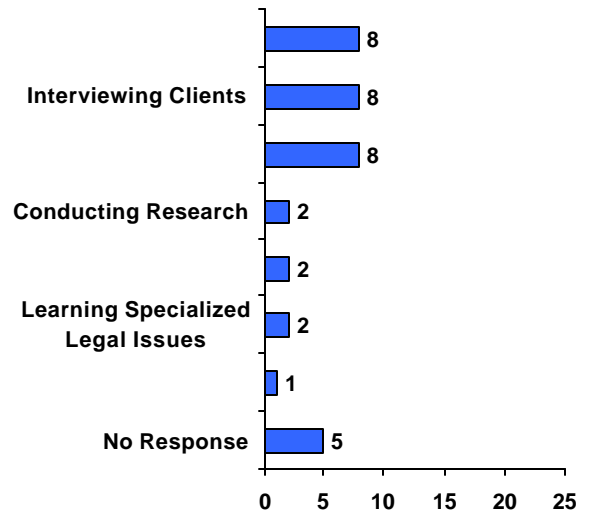
**BSU Volunteer Responsibilities**  
(N=23)



**More than one in five respondents say that helping people and working with and interviewing clients are the best aspects of their experience.**

Using an open-ended question, volunteers were asked what the best aspects of their BSU experience were. Slightly more than one in five persons indicate that helping people, working with clients, and interviewing clients are the best aspects of their experience.

**Best Aspects of Volunteer Experience**  
(N=23)



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Three in five volunteers report that there are specific aspects of BSU experience they liked least.

Respondents were next asked in an open-ended question to indicate what aspects of their volunteer experience they liked least. About one in four (6) respondents did not respond to the question, and three others report they enjoyed everything about their job. Three in five (14) respondents, however, identified certain aspects of their job they say they liked least.

Among the 14 respondents who answered the question, there is considerable diversity of opinion. Nearly one in four respondents (6) says that there are some specific aspects of their job that they liked least. Among the types of job responsibilities cited are: typing letters, writing reports, dealing with Social Security representatives, and title research at the Recorder's Office.

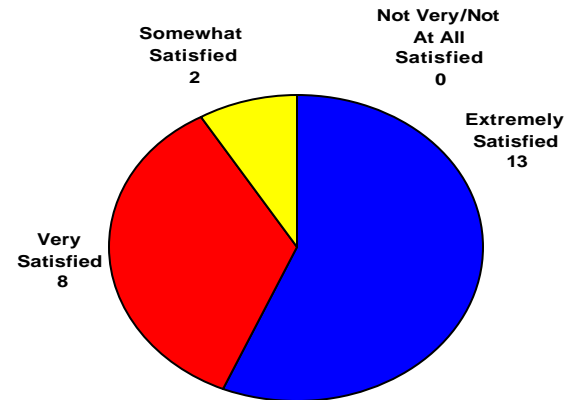
About one in eight volunteers also say that there are inadequate facilities (3) and three more suggested other issues requiring attention. Facility issues focus on not having a regular work and interview space. Other issues noted are clients not showing up for appointments (1), the need for improved communication with top LCE staff (1), and the need to have regular strategy meetings to discuss problems and recommend solutions (1). One volunteer also mentions that there is a lack of administrative support.

**More than nine in ten volunteers report they are extremely or very satisfied with the supervision they received during their BSU experience.**

Nearly three in five volunteers report that they are extremely satisfied with their supervision, and slightly more than one in three says they are very satisfied. No volunteer expressed dissatisfaction with their supervision.

### Satisfaction with Supervision

(N=23)



The two volunteers, who said they were somewhat satisfied with their supervision, were asked what could be done to improve their satisfaction. One volunteer indicates that nothing could be done. The other suggests that reducing the time it takes to process clients through the system and improving LCE administrative support could improve his satisfaction.

**About three in five volunteers have participated in BSU training in the past.**

Thirteen respondents indicate that they have participated in BSU volunteer training in the past. They were asked to rate how useful the training was. While 12 of the respondents report it was useful, only two indicate that it was extremely useful.

### Usefulness of BSU Volunteer Training

(N=13)



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**Only about one in three respondents think that additional training is needed to improve the efficient operation of the BSU program.**

When asked whether they think that additional training is needed to improve the efficient operation of the program, slightly more than one in three (8) says they think that additional training is needed. Slightly more than one in five (5) indicate that they do not think additional training is needed, while about two in five (9) are unsure.

The eight respondents who think that additional training is needed were asked what type of training they believe would improve the efficient operation of the program. Multiple responses were permitted. Six say they believe additional administrative training on procedures, materials, and resources is needed. Three think training on issues such as Medicare, Medicaid, and Social Security is needed, and two more think that computer training would be useful to them. There are few significant differences in responses between those who have never participated in training as those who have. One difference between the two groups is that two of those who have been to training think computer training would be helpful compared to none of those who have never participated in training.

**The preferred length of training by a majority of respondents is a half-day or less.**

For purposes of planning future training sessions, respondents were asked to indicate their preferred length for a training program. About one in five (5) reports that they prefer a full-day training program; however, more than half say they would prefer that the training be either a half day (9) or two hours (4) in length. The remaining participants are not sure (1) or did not provide a response (4).

**A majority of BSU volunteers plans to work in the program next year.**

When asked if they plan to work as a BSU volunteer next year, six in ten (14) respondents say yes, while only 3 indicate they do not plan to work in the program. Six respondents are unsure.

**Conclusions**

The Brief Service Unit (BSU) Program has a diverse pool of volunteers both in terms of age and length of service. Seven in ten volunteers are age 60 and over while about one in five is in their twenties. These younger volunteers are law school students involved in the program to gain experience working with clients. These law students are assigned to the program for a brief time while the majority of the volunteers have been engaged in the program for more than two years. A majority of volunteers says they plan to continue with the program in the next year.

Regardless of this diversity, all volunteers indicate they are satisfied with their experience in the program. The vast majority of volunteers have multiple responsibilities that include completion of applications and forms; third-party calls and negotiations; interviews; and document review. Fewer than half are engaged in legal research. All volunteers indicate that they have been satisfied with their supervision during the program.

When asked in an open-ended question what the best aspects of their volunteer experience have been, volunteers indicate they like working with clients, interviewing clients, and helping people. Others mention working with the LCE team, conducting research, and learning specialized legal issues.

When asked in an open-ended what they liked least about their volunteer experience, six volunteers report that there are some aspects of their "volunteer job" which are not satisfying: typing letters, writing reports, dealing with Social Security representatives, and title research at the Recorder's Office. Other mentions include inadequate facilities and communications issues. Three volunteers indicate they are fully satisfied with their BSU experience.

- About three in five volunteers has participated in some form of volunteer training, and all say they found the training useful. About one in three thinks that additional training is needed to improve the Regular updates on key issue areas would also benefit volunteers.

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efficiency of the program. Recommended training includes: administrative training on procedures, materials, and resources; issue training and updates on topics such as Medicare, Medicaid, and Social Security; and computer training.

The only difference in expressed training interests between those who have been training in the past and those who have not is computer training. Two volunteers who say they have participated in training express an interest in computer training compared to none of the volunteers who have never been trained.

When future training is planned, a majority of volunteers prefers that the length of the training be a half day or less.

The overall satisfaction of volunteers with the BSU is also reflected in their ratings of the quality of services clients received. The vast majority of volunteers report that the services provided to clients are good.

Based on the research findings, it appears that the Brief Services Unit Program has been highly successful on two dimensions: creating jobs that are satisfying to volunteers and providing quality services to clients.

While very few volunteers expressed concerns about their experience, there are two initiatives that might be worth investigation:

- Only three in five volunteers report that they participated in a formal training program. Six volunteers also report that information on administrative issues would improve the efficient operation of the program. A formal orientation program may be warranted. The orientation could explicitly detail the administrative resources available to volunteers as well as how to access core tools and available expertise as they perform their assignments. Both volunteers who have been trained in the past and those never trained express an interest this type of information;

For example, updates on Medicare, Social Security, and Medicaid among others would have value.

Another issue that is a concern to some volunteers is work and meeting space. Not having available space to interview clients can reduce the effectiveness of volunteers.

**Legal Counsel**  
**for the Elderly, Inc.**  
*is an affiliate of AARP and is the primary provider of legal services for elderly in Washington DC.*

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*www.abanet.org/legal/services/ejc/  
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Some of the exciting hotline related workshops we have planned:



- Hotline Outcomes Debate
- Saying No to Hotline Callers
- Legal Hotline as Entry Point for a Brief Services Unit
- Road Map to Implementation
- Analyzing and Maintaining Quality in Hotline Services
- Hotline Managers Roundtable

***Hope to see you there!***

## **AARP Foundation and the National Association of Senior Legal Hotlines (NASLH) Work Together on Medicare Part D Extra Help**

AARP Foundation has awarded a grant to the National Association of Senior Legal Hotlines to help senior hotline callers apply to the Social Security Administration Extra Help program. Extra Helps assists Medicare beneficiaries with paying the monthly premiums and co-payments for the Medicare Part D Prescription Drug Benefit.

Ten NASLH member hotlines are participating in the grant. AARP Foundation will reimburse each participating hotline for each Extra Help application a hotline submits to SSA on behalf of a hotline callers. The grant will help defray the hotlines' costs in screening callers for possible eligibility and filling out applications, submitting them online on paper to SSA, and tracking the number of applications submitted. The hotlines will be able to request reimbursement only for applications actually submitted to SSA.

### **Participating hotlines:**

California Senior Legal Hotline:	800-222-1753
D.C. Legal Counsel for the Elderly:	202-434-2170
Georgia Senior Legal Hotline:	888-257-9519
Legal Aid Society of Hawaii:	808-527-8033
Legal Hotline for Older Iowans	800-992-8161
Legal HelpLine for Older Kentuckians:	800-200-3633
Legal Hotline for Michigan Seniors:	800-347-5297
Legal Services of North Dakota	866-621-9896
Ohio ProSeniors Legal Hotline	800-488-6070
Legal Hotline for Texans	800-822-2520

## Controlling Calls: Ideas for Staying Sane and Keeping the Hotline Customer Satisfied

By Ellie Crosby Lanier\*

### Introduction

Managing call volume is one of the most challenging things about running a hotline. With the proliferation of telephone customer service and automated menus, we all know the frustration of not being able to get through to someone when we need help urgently, and we can only imagine how a client with a legal problem must feel. While a few programs, mostly with highly rural populations, struggle to increase their call volume, most legal hotlines have the opposite problem - how to deal efficiently and appropriately with an over abundance of calls and clients needing our assistance. For many, adding staff to address increased volume or need is not an option, because the cost of doing so may be prohibitive, or because available space and phone lines may not be sufficient to handle. High volume results in a tension between current clients and those awaiting services, and can be the most stressful aspect of hotline work.

The good news is that programs have a variety of options to address this problem. This article outlines a few ways to manage call volume, protect your sanity and that of staff, and assure that your callers are well served. This article will explore a number of ways, both simple and complex, that hotlines can employ to reduce call volume (either temporarily or longer-term), keep clients happy and staff relaxed enough to do their jobs well.

### Communicate with Clients

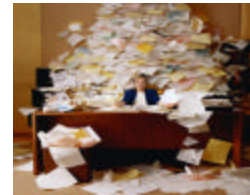
Well before call volume becomes unmanageable, it is important to let clients know what they can expect when they call your office. One important way step is to define your services and to clearly communicate their scope up front to current and potential clients. Let clients know the hours they can

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call for services. If you do not return messages left on a machine, make sure clients are aware of this policy. If you are a hotline only, explain that your service is conducted only over the telephone so clients will not expect full service representation. If you use screeners and/or paralegals, make sure clients understand that they may be unable to speak to a lawyer at this stage. When call volume gets heavy let clients know this, whether through your receptionist or by changing your outgoing message, and let them know how long it will be until they may speak with the advocate. This one simple step can go a long way towards alleviating anxiety on a client's behalf, and reducing client complaints.

### Define Acceptable Backlog



Because call volume may ebb and flow according to its own rhythm (or possibly the moon), define for program what is an "acceptable" backlog of calls, either by number of calls or by date of call. Often a busy day will be followed by a more manageable one. If you pick a point at which your backlog becomes unacceptable, you can wait until the backlog reaches that point to institute volume control methods. While defining that point will not have an impact on the number of calls you receive, it can enable you and staff to focus on handling calls and therefore avoid the distraction of feeling overwhelmed by the backlog. Communicate your plans for control with staff and encourage them not to worry. If you reach your point, then implement your plan.

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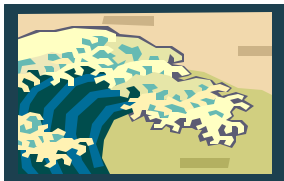
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## Targeting Your Services/ Specialized Outreach



An important function legal hotlines play is to increase access to legal help to those who cannot avail themselves of legal assistance, either because of the physical distance to a law office, difficulty leaving their homes, or inability to afford traditional legal help, among other reasons. One important way that hotlines can manage call volume is to consider targeting services to those most in need. Targeting should be related to the characteristics of the underserved in your state or region. Targeting does not mean that you turn eligible non-targeted clients away but rather specializing outreach to those populations who need you most. Working to publicize your hotline through agencies and media outlets that serve your target population is one way to target; limiting outreach to communities that are outside of your target population is another.

## When Possible, Prepare for Onslaught



While not always possible, sometimes you will have advance warning of the potential for an onslaught of calls. For example, if you give an interview to media and provide your hotline number, you can anticipate that when the story runs, your call volume will increase significantly. If possible, prepare by revising staff schedules for the days immediately following, so that you will have the capacity to respond to the increase. One hotline keeps some funds allotted for peak days and has list of contract attorneys who can be called upon to take calls from their homes or offices as needed. If your available staff is limited and that is not possible, consider bringing in volunteers to assist by taking basic information and providing a triage function to help determine the ur-

gency of incoming calls. Sometimes factors outside the hotline will result in an increase in calls. For example, your number might be listed on Medicare Part D outreach materials, in an article on advance directives, etc. If you know that this is coming, you can prepare basic packets of information in advance that can decrease time spent on calls. In this type of situation is it important to arrange with other agencies how the calls will be divided so that work will not be duplicated, clients will be served more quickly and thoroughly, and your hotline will not have to bear an unmanageable amount of the burden.

Some peaks can be anticipated. In Georgia, we frequently experienced a spike in call volume after the first of each year, when clients were confused about the impact of Social Security cost of living adjustments on other benefits, such as food stamps. Advance directives have been publicized during October of each year, and May has been designated as Older Americans Month. A little preparation, whether through the development of simple client materials that can be mailed, or through the development of legal and other volunteers to assist with the theme, can go a long way to making the spike in calls more manageable for staff and clients.

## Modify Your Services Temporarily

If your hotline provides help to clients such as document preparation or review, three way calls with clients, you may consider suspending these additional services temporarily until you can get call volume under control and respond to calls in a timely way. While this is not preferable, focusing your efforts on the most basic aspect of hotline work, accurate legal advice by phone, and matching clients who need further representation with the appropriate program, can help to get things under control. Then you can add services if staff and resources permit.

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## Modify Your Intake Hours



Cutting back on the hours you accept incoming calls for intake is another way to reduce volume to a manageable level. This is not an easy choice to make, but it may be necessary. Again, it is important that you communicate the reasons for the change to staff and clients.

## Temporarily Suspend Intake

As a last resort, consider temporarily suspending intake. This may mean closing down the phone lines for a day or longer, in order to address the calls you have already received.

## Develop Additional Resources

Another way to deal with increased volume is to develop additional resources, whether volunteer, in-kind, or financial. Be creative. You may find a bar committee, student group or senior volunteer program willing to assist by fielding calls, developing client material, or serving as a substantive resource. This assistance means more time for your staff to do their jobs, answering client calls and addressing concerns. Hunt down possibilities for in-kind resources that might help you manage, be they phone, computer or even borrowed staff. Donated paper or printing frees up budget resources for increased staff hours, even on a temporary basis.

## Support Staff in Maximizing their Efficiency

Seek input from staff on ideas to maximizing efficiency. They know best what you can do to increase their ability to handle calls. Sometimes a little thing, like streamlining or modifying a procedure, developing a script for volunteers, or standardizing intake questions can make a big difference in the time a case may take. Consider the cases that seem to

be most time consuming and seek input on how to address more efficiently. If your staff knows you will support them in times of high volume (and stress) and that you value their opinions, they will feel free to do their jobs, and they will give their all. In times of high volume, it is even more important to show them support and appreciation.

## Develop a Procedure for Emergencies



Finally, regardless of how you decide to address times of heavy call volume, you should have a procedure for handling client emergencies. That said, make sure that your policy does not rely on a client to self define their emergency. Most people with a legal problem or question believe that their situation is an emergency, so asking the client to tell you if their case is urgent will likely not help you to understand the nature of their situation. Think of objective ways to identify emergency cases, such as deadline looming, something important at stake, certain case types, etc.

## Conclusion

Heavy call volume is perhaps the most difficult problem hotlines can face. High volume can result in unhappy clients and staff, and can make the hotline a difficult place to work. While many of these suggestions are unpleasant to implement, they may be necessary on occasion to assure that the clients who are in your system already receive high quality assistance. Don't forget to document the need for your service and use your experience to argue for additional funds so that you will have additional resources to address high volume in the future.

## ***From by the Frontline***

*By Denise J. Trujillo\**

### **Assisting the “Unassistentable”**

At one time or another, every hotline attorney has encountered an extremely hostile caller and then found themselves at a crossroad of whether to assist or turn the hostile client away. Although all we hear at our end of the line is a rude and obnoxious caller, what we do not hear is the echo of the traumatic ordeals that have afflicted the caller and have then created the temperament of the caller. The following is an illustration of the ordeals a caller has endured before calling the help line.

The caller had called three other organizations and all informed her that they were unable to help her and kept giving her other toll-free numbers for possible assistance. The caller was eight (8) months pregnant, already had another child and her husband had just announced that he was leaving her for another woman and was going to fight for custody of their child. This caller had no job and solely relied on her husband’s income to survive. The caller now faced eviction with nowhere to live, no money for food or clothes for herself or her child and no husband to be by her side. To make matters worse, her husband wanted custody of their young child because he claimed that since the caller was unemployed and would soon have no home, she was unfit to care for a child.

The caller’s husband had already filed for divorce and had an attorney representing him. As the caller frantically called from place to place the cold reality set in that there was nobody to help her keep her child, home or husband. As the caller called the last possible resource, a lady answered the help line and described their limited services to the caller. The caller “lost it” and began yelling and degrading the help line attorney. The help line attorney had no idea what the caller was going through and only knew how rude and degrading the caller was being.

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The help line attorney had to make the choice of either: 1) telling the caller to cooperate or she would end the call OR 2) pause and try to understand where the client was coming from.

Sometimes before jumping to conclusions about a caller’s “attitude” we have to understand that we are dealing with a low income population of whom several are going through traumatic legal problems and have nowhere to turn. Our job is to assist callers with their problems and that means we have to know their problems first.

Recently I had a client that had a situation that was strikingly similar to the above scenario. I explained to the caller that I was trying to help her but that I could not effectively assist her unless I had her cooperation. At this point, the caller exploded and divulged the traumatic details that she was enduring. After allowing the caller to “vent”, I acknowledged the client’s bad situation but explained to her that I was here to help her with her problem and was on her side. In essence, I acknowledged the validity of her situation by using an “I statement” and then I explained to her that I was next to her and willing to attack the problem with her. That little sentence changed the entire demeanor of the call and she quickly apologized for her uncooperative behavior. The caller realized that although everything was against her, I was beside her.

We have to remind our clients that they are calling us for help and we are on their side. Understandably, some callers are so uncooperative or enraged that they are not able to reason adequately and in that scenario we have to help as best as possible but also know where to draw the line at being attacked and halted in our ability to assist, thus ending the call. However, I believe that taking the approach of: 1) hearing the callers situation, 2) verbally acknowledging the situation to the caller by using an “I statement” and then 3) explaining to the caller that you are on his/her side, will allow you to keep your cool and allow you to possibly calm down the caller and assist them. If our job is to help the people calling the help line then we must at least attempt to help at all levels.