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AN INVITATION TO A SERIOUS CONVERSATION ABOUT HOTLINES

by Joan Kleinber, Director of CLEAR,
Northwest Justice Project, reprinted from
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In the seven years since the Legal Services Corporation expressed an interest in centralized, telephonic delivery systems, a debate has simmered regarding the value of the model generally referred to as a “hotline.” Although the actual underlying values and design of the hotlines vary widely, the conversation generally reduces to the polarity of hotline good/hotline bad, which is unfortunate because what is really needed is a thoughtful critique of the possibilities and limitations of the model. In the conversations about hotlines, people are troubled by a perception that hotlines are a politically palatable way to provide services that do not challenge the established order and that placate powerful opponents of legal services funding – that they are the antithesis of meaningful advocacy. The recent proliferation of pro se tools directed at low-income people is troubling because it de-emphasizes the dire need for representation. I do not, however, equate the increased emphasis on the creation of pro se tools with the growth in the use of hotlines. All advocates for indigent people need to steadfastly maintain focus on the importance of securing legal representation for low-income people individually and for institutional advocacy.

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To the extent that I have a bias, it is this: I firmly believe that a hotline has a valuable place in the struggle for high quality and effective services when it is a client centered component on a continuum of services that provides assistance for optimal resolution of legal problems and that attacks the causes and effects of poverty. I also feel certain that clients would be best served by a shift in the conversation about hotlines from the perceived differences between high access hotlines and meaningful advocacy, to the confluence of their goals.

Legal hotlines were initially piloted by programs serving senior citizens. In 1995 the Legal Services Corporation expressed an interest in centralized telephonic service delivery methods and hotlines have since appeared in a growing number of states. Programs implementing hotlines individually define and design the actual models and as a result the models differ significantly across the country. I have always resisted the use of the term "hotline" because it connotes a very brief encounter between lawyer and client, whereas our telephone encounters with clients are priority driven and are often quite extended. The term "hotline," however, provides easy shorthand for telephonic delivery models and I will use it in this article.

Because of the local designs, hotlines are driven by different visions and are the result of different design choices. More importantly, they are evolving as they mature. Hotlines have benefits and they have limitations, just as any intake and service model does. A useful conversation for the legal services community addresses what benefits hotlines provide that have eluded us in the past.

HOTLINES CAN INCREASE ACCESS FOR CLIENTS

Among the most remarkable aspects of hotlines are the geographic reach and the convenience for clients. The telephone easily overcomes great distances. In Washington, hotline cases are distributed around the state in almost exact proportion to the poverty population. GIS mapping demonstrated to the Legal Aid Society of Orange County that its hotline covered the county more extensively than their neighborhood office model had and also helped the staff identify pockets of previously unidentified

need, such as at public housing projects. The telephone is, above all, convenient for clients, particularly remote rural, disabled or homebound people or those with transportation challenges. The telephone provides service in the homes, neighborhoods and communities where people are comfortable, rather than requiring them to travel for program convenience. It also allows working people whose jobs allow use of the telephone to contact legal services during regular business hours. Clients' first contact with the program is with someone trained to offer advice on how their problems can be solved rather than deferring that meeting to a later appointment time. Hotline clients are pleased (and frequently amazed) that they do not have to go through a preliminary screening and then wait to consult a lawyer or paralegal, but find a lawyer or paralegal immediately available to them. This contact is particularly important when simple advice can avert a major problem. For example, advising a client that she does have to pay the rent within three days of receiving a three-day notice to pay or vacate even though the reason she had not paid it was due to the condition of her apartment, is information that can help the client avoid eviction and pursue the habitability issues with a roof over her family's head. Similarly, some problems evolve so quickly that a hotline, with its mechanisms to speedily advise the client and perform brief service, is well-situated to intervene and preserve important rights on a short timeline. A client can be in court obtaining a Domestic Relations Protection Order the same morning she calls the hotline.



A HOTLINE HELPS LEGAL SERVICES PROVIDERS DEVELOP A RATIONAL DELIVERY SYSTEM

A centralized system, particularly one serving multiple legal services programs, provides a systematic way to identify and refer clients to a program or advocate that handles the client's issue. This referral can be easily made regardless of what program the advocate works for or where he or she is located, supporting that advocate's efforts at systemic advocacy. The same system that allows referrals to be made across geographies and programs

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also provides a global view of the entire delivery system that reveals gaps in coverage of high priority problems. A hotline results in systematic rather than random choices about what issues are pursued because it applies priorities to a large pool of client requests, rather than to those who are lucky enough to get in to a severely limited intake system. Hotlines allow us to identify and report patterns where a smaller volume of cases would not display a trend. A centralized hotline reduces client frustration by assuming the burden of identifying the appropriate service provider for the client, rather than requiring a client to apply to various programs to find the one that handles his or her particular problem or to learn that none does. A centralized hotline promotes collaboration among independent service providers to provide referral criteria to the hotline and provides data for advocates, planners and funders. All of these functions are necessary to a high quality delivery system that can address both individual and systemic problems.

A HOTLINE IS EFFECTIVE WHEN IT IS WELL DESIGNED

Another useful conversation is about hotline design elements that maximize quality. A hotline design must integrate the hotline into the full continuum of services and be staffed in correct proportion to the other types of services a meaningful delivery system provides. A hotline must itself have many of the characteristics that yield high quality advocacy in any legal services program. Foremost, it must be staffed with caring advocates who are committed to the program mission and who are well-trained in the broad range of substantive legal problems that our clients confront. The advocates must be able to see beyond the presenting problem to help the client sort out interconnecting issues. The advocates must understand the context of the clients' lives and the daily adversity they face due to their economic status. The advocates must understand how to identify mental illness and other disabilities and how to work with people experiencing these conditions. The advocates need to appreciate the various approaches that may be appropriate to resolve the client's problem including advice, correspondence, alternative dispute resolution, litigation and legislative advocacy. The sys-

tem as a whole needs to have the capacity to utilize these remedies — though not necessarily each and every program in the system. Since the work of a hotline advocate is very intense, the program must institute methods to retain employees so the hotline is staffed with experienced advocates.

HOTLINES CAN HAVE HIGH PRIORITY OR “IMPACT” RESULTS



Many hotlines charge the hotline advocates with performing “brief service” in a variety of situations. These services regularly yield high priority results such as preservation of a tenancy in subsidized housing. The hotline, when integrated with other programs and providers in the system, can have high impact results. For example, our hotline advocates noticed a pattern of state contracted, low-wage, in-home workers finding their entire earnings paid to garnishors because the state determined the remuneration was not “wages” and therefore did not allow the workers to claim the wage exemption to garnishment. At the urging of hotline advocates, Columbia Legal Services, which receives no LSC funding, undertook administrative advocacy that resulted in affording statutory wage exemptions to these impoverished workers. In another case, a hotline lawyer helped a Washington woman who had fled domestic violence in Texas gain the right to have her custody issues heard in a convenient forum. The hotline lawyer

briefed the jurisdiction issue and prepared a volunteer lawyer in a remote county to argue the matter. After a favorable ruling was issued, which will positively impact local interpretation of the Uniform Child Custody Jurisdiction and Enforcement Act for domestic violence victims, hotline advocates' intense efforts found a legal services lawyer in Texas to argue for declination of jurisdiction there. That motion was also successful and the woman will get to resolve important safety and parenting issues in her home state. Hotline advocates participate in substan-

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tive law task forces, visit assigned geographic regions to work as liaisons with local legal services providers and engage in a variety of community and bar activities, making them engaged players in the legal services delivery system.

A robust hotline has mechanisms to send information from the hotline to the advocates in the field who are positioned to address systemic problems identified by the hotline and to send information from the field to the hotline to help identify clients being systematically hurt by, for example, unscrupulous lenders. Hotline managers must give the advocates the discretion, consistent with program priorities, to spend sufficient time on each call to properly serve the client based on the nature of the client and the legal problem. Hotlines are also an excellent training ground where experienced advocates help train recent graduates on substantive law and client interview skills while fostering a lifelong commitment to our clients. A hotline can utilize skilled and committed advocates for whom litigation is not an option due to physical conditions or life circumstances. All of these characteristics result in a hotline that is a gateway, rather than a barrier, to meaningful assistance.

RECOGNIZING AND WHERE POSSIBLE MITIGATING THE LIMITATIONS OF HOTLINES IS CRUCIAL TO THEIR DESIGN

Some people need face-to-face interaction due to disabilities or personality characteristics. Hotlines are not appropriate for populations that cannot or will not use a telephone. These are the populations for which legal services programs have always performed outreach, for example, migrant and Native American populations. The delivery system as a whole needs to maintain capacity for in-person intake and for outreach when and where necessary. (At the same time, there are steps a hotline can take to be hospitable to non-traditional callers, for example, staffing with bilingual advocates, opening at hours that are convenient for certain populations, such as farmworkers, and training advocates on problems experienced by isolated populations.) A hotline advocate cannot immediately read documents in the client's possession, but alternatives such as a toll-free

fax line on which community agencies (and in some smaller communities, businesses) are willing to fax documents to the hotline advocates mitigate this problem, as will evolving technologies.

A GOOD HOTLINE WILL EVOLVE AS IT MATURES



Hotlines must evolve in response to experience and client needs. The Hotline Outcomes Study gives some specific direction about how hotlines can improve the likelihood of positive outcomes for clients in the context of a system with broad access. Not surprisingly, the study found that the more intense the hotline advocate's interaction with the client, such as through brief service or follow-up, the better the outcome. In Washington we are in the process of planning a modification of our system that will reduce the volume of calls handled in favor of more brief service and follow-up with clients by hotline advocates. We have started projects targeted to address needs not covered elsewhere in the delivery system. CLEAR advocates will now occasionally handle telephonic administrative hearings involving termination of benefits under the state-funded disability program, a true safety net, after determining that there is no other resource for representation available. While we don't accept the corresponding reduction in access lightly, the reality is that the system as a whole has contracted over the past few years and there are fewer options for referral for extended service, necessitating more brief service in order to maximize the hotline's effectiveness. This change is part of the calibration that is necessary to keep the system relevant to clients' most pressing needs.

HOTLINES CAN FOSTER SOCIAL CHANGE

A hotline can integrate students and volunteer lawyers. The profound experience of hearing and dealing with a wide range of crises wrought by pov-

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erty turns students and volunteers into advocates for legal services (in both the political and funding arenas) as well as for clients. Because the hotline advocates talk with many clients, they are well-situated to identify pressing issues for impact work and that work, as described above, can occur even within the boundaries of the work that hotline advocates perform. Hotlines are a vehicle for providing broad access, which means the staff talks with many low-income people daily. Not all of those people get the level of service needed for effective resolution of their problems. Yet, even our inability to provide the full level of service needed for people can lead to change. When hundreds of thousands of clients each year are told that they must proceed without any further legal assistance because it has been politically determined that they are not entitled to it, who can say that will not provide the impetus for a movement that may one day produce permanent, adequate funding for legal assistance as a right?

The purpose of an integrated hotline is not to provide pro se assistance to the most people possible; it is to help clients understand their legal situation and to resolve the problem or link them with the legal services provider that can render the most appropriate service to do so. People across the country face huge adversity every day due to their economic status. Once we look at what advantages a good hotline has, how it should be designed and how it can have both individual and broad impact, we can perform a similar analysis of nonhotline models and finally address the question of how we can integrate the best of both into our delivery systems. It is only in the thoughtful synthesis of delivery models that we will find the very best work that legal services programs can do.

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NTAP: Basics in Starting Up a Centralized Intake System

The National Technology Assistance Project is presenting Hotline Roundtables, a new series of virtual trainings designed by NTAP which will feature leaders of the hotlines and centralized intake systems answering routine questions for managers and directors. This series is designed for staff who are NEW or in the early stages of designing their own centralized intake system. Topics that will be covered in this series will include:

- * Goals that centralized intake units (CIUs) or hotlines should fulfill
- * Hotline design and models
- * Staffing options
- * Basic operations of CIUs and hotlines
- * Management of hotlines or CIUs
- * Quality Control Methods
- * Cost of implementing a system
- * Start-up planning and project management
- * Technology options

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New Mexico State-Bar's Lawyer Referral for the Elderly Program (LREP) Update



New Mexico's Lawyer Referral for the Elderly Program is the only one of the 25 statewide senior legal hotlines to be operated by its state bar. The telephone screening and advice service began in 1992 when the New Mexico State Bar was awarded a three year Administration on Aging Title IV (research and demonstration) legal hotline grant. The State Bar was already running an extensive lawyer referral service at the time but saw the hotline format as a way to make the referral process much more efficient by using staff attorneys to screen clients who needed referrals to the private bar and provide advice and brief services to clients whose matters could be handled over the phone without need for extended representation. The Title IV grant expired in 1995 and subsequent funding included a combination of IOLTA, Title IIIB and State Bar monies. LREP is presently funded through the State Aging and Long Term Care Department, the New Mexico Civil Legal Services Commission and the State Bar. Since then, the LREP program has become a major vehicle for the provision of *pro bono* hours to New Mexico seniors.

Lawyer Referral for the Elderly Program,
excerpted from Pro Bono Publico, an article by Richard B. Spinello, New Mexico Bar Journal, Summer 2003.*

Lawyer Referral for the Elderly Program (LREP) offers legal assistance, advice, brief services and private attorney referral to all New Mexico residents 55 years of age or older. The referrals made to the private bar range from *pro bono* referrals to full fee referrals after careful screening by staff attorneys. Over the past year, New Mexico attorneys have donated more than 2,000 *pro bono* hours to this one program alone. In addition, attorneys who had

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accepted LREP case referrals reported more than 1,000 fee-generating hours last year. To put an average hourly rate to these figures, that's more than \$200,000 donated and close to \$100,000 in fees generated through LREP for the private bar in the past 12 months.

On average, 97 referrals are made by LREP out of more than 3000 new cases that are screened by staff attorneys each month. In practical terms, more than 2000 participants a month have their issues screened and resolved with referral for legal representation. While screening cases, the LREP attorneys have access to information and services not readily available to members of the private bar. How many attorneys know how to read the Health Insurance and Benefits Assistance Corps (HIBAC)[a statewide network of trained counselors assisting with benefits issues such as Medicare, Medicaid, Social Security, etc]? Or what a nursing home ombudsman does? [Long-Term Care Ombudsman program provides advocacy and assistance to residents of long-term care facilities]. LREP is often a resource for bar members as well as members' clients needing assistance outside the members' practice area.



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IOWA LEGAL AID'S OUTREACH DEMONSTRATION PROJECT REPORT,

by Scott Hartsook* presented at Equal Justice Conference
APRIL, 2003

PURPOSE OF PROJECT



Iowa Legal Aid has been conducting an Outreach Demonstration Project since January 2001. The purpose of the project is to identify the most efficient and effective outreach methods of informing older Iowans about the legal assistance that is available to them from Iowa Legal Aid's Legal Hotline for Older Iowans. The information provided by the project will allow the Legal Hotline, and Iowa Legal Aid's other projects, to replicate the most effective outreach methods to increase the number of Iowans who know about the availability of legal assistance. The dissemination of the project data will also allow the Administration on Aging, senior hotlines in other states, other legal services programs, and other agencies to better market their services and help a significantly greater number of people.

The Outreach Demonstration Project was designed to help senior hotlines in largely rural states confront the difficulty of informing older people about the availability of services. Senior hotlines in rural states have historically had a low call volume, which is just the opposite of the problem faced by urban hotlines, which need to limit the call volume because of lack of resources to handle the volume. The smaller number of people in rural states, along with the geographical dispersion of the people, make it difficult to publicize the existence of hotline services to large numbers of people. Since resources for outreach purposes are minimal, rural hotlines especially need to know the most effective and efficient methods of outreach in order to reach the greatest number of people at the lowest cost. The Outreach Demonstration Project was designed to provide information to rural hotlines about the efficacy of various forms of outreach.

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DESCRIPTION OF OUTREACH DEMONSTRATION PROJECT

Iowa Legal Aid started its Legal Hotline for Older Iowans with a three-year grant from the Administration on Aging. The Hotline began accepting calls in May 1998. The Administration on Aging awarded Iowa Legal Aid a second three-year grant for its Hotline in 2000, which grant included funds to conduct the Outreach Demonstration Project. Being part of Iowa Legal Aid, the Legal Hotline is integrated into a statewide legal services delivery system. In addition, Iowa Legal Aid has Title III-B contracts with twelve of Iowa's thirteen Area Agencies on Aging and works closely with Iowa's aging network.

Iowa is divided into 99 counties of approximately equal geographic size. Iowa is largely a rural state, with a total population of 2,926,324. The largest metropolitan area of Des Moines has a population of less than 500,000. Although there are twenty counties in Iowa which have populations over 30,000, the remaining counties, which generally contain approximately 400 square miles, have populations ranging from 4,866 to 29,903. Many of its rural counties have elderly populations approaching 25% of the population. The Legal Hotline provides services to older Iowans in all 99 counties and at the time the Outreach Demonstration Project began, was providing services to approximately 2,300 clients per year.

The Outreach Demonstration Project was originally designed to divide Iowa into six to eight different outreach districts in which one or more types of intensive outreach methods would be used for an extended period of time. Outreach methods were then to be rotated in each of the areas for another extensive period of time. After obtaining technical assistance from the Graduate School of Social Work at the University of Iowa, which is skilled in the area of social science research, it was subsequently decided to concentrate outreach methods in small geographic areas and to engage in them for only short periods of time in order to get more appropriate data. Iowa's 99 counties, in conjunction with Iowa Legal Aid's case management system, allowed the tracking of cases per county for each type of outreach when it occurred. The Legal Hotline also had

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historical data for the three years prior to the beginning of the Outreach Demonstration Project which could be used as a baseline to compare calls generated by specific outreach methods. For each outreach method, the Legal Hotline compared the number of calls generated in a county when a specific method was used with calls generated in the same counties during previous weeks, months, or years as seemed most appropriate.

RESULTS OF OUTREACH METHODS



Intensive Outreach Activity

In the summer of 2001, the Legal Hotline designated an intensive outreach district comprised of seven counties in southern Iowa that forms the Area XIV Area Agency on Aging service area. The area contains some of Iowa's poorest counties, and also some of the counties with the largest percentages of elderly people. The Legal Hotline hired a student attending the Drake University Law School to be the outreach coordinator for the intensive outreach district. She began her employment with the Hotline in May 2001 and conducted intensive outreach activity in the area to ensure that service providers and older Iowans in the area knew about the Hotline. She met with many service providers, including staff with the area agency on aging, the Farm Works program, the Department of Human Services, senior centers, public health agencies, and nursing homes. She also saturated the area with posters and brochures for the Hotline at places such as court houses, pharmacies, convenience stores, hospitals, nursing homes and other institutions. She also organized numerous community legal education presentations to people in the outreach area. The outreach activities extended over three months and had a significant effect on the number of calls received from the area. Calls to the Hotline from the Area XIV service area increased by 62% for the months of June, July, and August 2001 over the prior three months of March, April, and May 2001. The increase was from 13 to 21 calls. In addition, calls for June, July, and August 2001 increased by 50% over the same months in 2000. These percentages are in con-

trast to the calls from the entire state, which calls actually decreased from March, April, and May 2001 to June, July, and August 2001 by 5%. Compared with the period of June, July, and August in 2000, the calls from the entire state increased between 2000 and 2001 by 38%. Therefore, the intensive outreach efforts did appear to make a difference in the number of new calls to the Hotline. Unfortunately, the effects of the intensive outreach did not last. For the last three months of 2001, calls from the intensive outreach area to the Hotline decreased by 23% from the same three months in 2000. Therefore, it appears that this type of intensive outreach would have to be maintained on an ongoing basis in order to keep the Hotline's name and telephone number before the public.

Although this method of outreach resulted in a large increase in the number of calls to the Hotline, it was also labor and time intensive. The intern was a full-time employee who worked for the Hotline for 400 hours during the summer. Although much of her time was spent handling client calls during the summer, she spent approximately 130 hours conducting her duties for the Outreach Demonstration Project. Therefore, although this type of outreach was effective in informing people about services from the Legal Hotline, it was also relatively expensive.

Hotline Fliers in Church Bulletins

The Legal Hotline worked with Ecumenical Ministries of Iowa to develop a small flier about the Hotline's services that could be inserted into church bulletins. A copy of the flier is attached as Appendix A. The churches were also given larger brochures about the Legal Hotline that were made available at their churches. This outreach method was conducted in the Seneca Area Agency on Aging service area, which is a ten-county area in southeast Iowa which contains some of Iowa's poorest counties and which also has a large concentration of elderly people. The outreach conducted in the area began in October 2001 and extended through February 2002. Fifteen churches agreed to participate in the distribution of fliers in their church bulletins. That compares to a total of 166 churches which were asked to participate. The churches were contacted only after having

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spent considerable effort in contacting Ecumenical Ministries of Iowa and getting approval from its governing body to release the names and addresses of the churches in this specific area in order to offer them the opportunity to participate. Eight hundred-eighty brochures and 1,475 fliers were mailed to the churches between October 2, 2001, and January 22, 2002.

Many of the churches that participated in this effort were from small towns in a sparsely populated area of the state. No significant data could be obtained to show that this type of outreach had any effect on calls to the Hotline.

Paid Newspaper Advertisements



Iowa Legal Aid placed small ads which were normally 1.5 column inches in various newspapers throughout the state. Two types of ads were used. One ad was a general ad that contained only the name of the Hotline and the Hotline's telephone number. The other ad contained specific issues of interest to older people in addition to the Hotline's name and telephone numbers. The ads were run for three to seven consecutive weeks in each newspaper. Some newspapers were weekly newspapers, while others were daily newspapers. The ads were run once a week in each newspaper. The costs of the ads ranged from \$5.85 to \$28.19.

The paid advertisement in newspapers generated a mixed result. The specific Hotline ad was published in the Burlington Hawkeye, a daily newspaper published in Burlington, Iowa, in a county with a population of approximately 42,351. The ad was run once each week for four consecutive weeks beginning on November 12, 2001. During the four weeks that the ad was run, the Hotline received eight calls from the county. The Hotline received four calls during the four weeks prior to the week that the first ad ran, and received two calls during the four weeks after the last week that the last ad was run. The average number of calls that the Hotline received from that county in 2001 was four calls per week. Therefore, it appears that the ads may have doubled the calls that the Hotline received during the four weeks of the experiment.

The specific ad was also run in the Dubuque Telegraph Herald, a daily paper published in Dubuque County, Iowa, with a population of approximately 89,143. The ad was published once each week for three consecutive weeks beginning November 12, 2001, with the last ad being published on Thursday, November 29, 2001. The Hotline received eight calls from Dubuque County during the three weeks that the ads were published and the week following publication of the final ad. This compares to two calls that the Hotline received from Dubuque County during the same period in the previous year. In the four weeks prior to the publication of the ads, the Hotline received five calls from Dubuque County while in the four weeks after the four week test period, the Hotline received four calls. The average number of calls that the Hotline received from Dubuque County in a four week period in 2001 was 3.8. Therefore, it appears that the specific Hotline ads published in the Dubuque Telegraph Herald caused calls to the Hotline to increase by 100%, just as it had in Burlington.

The general ad for the Hotline was published in the Clinton Herald in Clinton County, with a population of approximately 50,149, once each week for seven consecutive weeks beginning November 14, 2001. Again, the ads did not generate many calls. The Hotline received one call the first week the ad was run, another call the second week, and two calls the third week. The Hotline received no calls during the final four weeks that the ad was run. During the seven week period, however, the Hotline received a total of four calls. The Hotline received only 15 calls from Clinton County for all of 2001, or an average of two calls every seven weeks. In addition, during the seven weeks prior to the test period, the Hotline received only one call from Clinton County, while during the seven weeks after the test period, the Hotline received one call from Clinton County. Therefore, it appears that the ads did substantially increase the number of calls from the amount of calls normally received from Clinton County.

The Hotline also ran both general and specific ads in other newspapers, including smaller newspapers that were only published once each week. The weekly newspapers were in counties

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where the number of calls received from the Hotline on a yearly basis were so small that reliable data could not be obtained.

The conclusion from this data indicate that the ads do have an impact on the number of calls made to the Hotline and that whether or not the ad was specific or general did not make any significant difference. Additional publication of ads over more extended periods of time would probably be helpful to determine the true effect of newspaper ads.

Press Releases

Unlike the use of paid advertising, press releases can be distributed to the media fairly cheaply. In fact, one method of distributing a 400-word press release to the media in Iowa costs approximately \$170 for distribution to more than 475 media in the state.

In the spring of 2002, the state was divided into five areas and a press release about Iowa's Elderly Property Tax Credit and Rent Reimbursement programs was issued to all news media in the various areas. The releases were staggered, with the first area being mailed the release on March 13, 2002, and the last area being mailed the release on April 25, 2002. In addition to each press release emphasizing a specific legal issue of some current newsworthy issue, each of the press releases also informed people that the Legal Hotline was available to answer other civil legal issues that confronted elderly Iowans. The effect of the releases on calls to the Hotline was fairly dramatic.

The press release was mailed to media in a southwest Iowa area, which contains 15 counties on March 13, 2002. The average number of calls to the Hotline from the area was 5.7 calls per week during 2001 and 8.9 calls per week during 2002. In the four weeks prior to the issuance of the release, the Hotline received 10, 10, 9, and 6 calls. In the six weeks following the issuance of the release, the Hotline received 35, 16, 22, 14, 8, and 5 calls. Stated another way, in the four weeks prior to the release, the Hotline received a total of 35 calls, while in the four weeks after the release, the Hotline received a total of 87 calls, or 150% increase. During the same time

periods a year earlier, except for one week, calls ranged from a high of eight per week to a low of two per week. In one week, the Hotline received 34 calls, which is the week in which the daily newspaper in Council Bluffs published a similar article about the Elderly Property Tax Credit and Rent Reimbursement programs and the Hotline received 34 calls. The substantial increase in the number of calls in the area after the issuance of the press release did not coincide with a similar increase in calls throughout the entire state, so it appears that the increase in southwest Iowa was directly related to the issuance of the press release. The other areas where similar press releases were mailed in the spring of 2002 experienced similar increases in calls to the Hotline.

Other press releases have been released by the Hotline on a statewide basis. A press release about the Elderly Property Tax Credit and Rent Reimbursement programs was issued to all news media in the state on March 30, 2001. In the week after the press release was mailed, the Hotline received 81 calls, while during the two weeks prior to the issuance of the release the Hotline only received 46 calls each week. In the second, third, and fourth weeks after the issuance of the press release, calls to the Hotline returned to levels of 46, 31, and 47. Another press release about the Elderly Property Tax Credit and Rent Reimbursement programs was issued on May 4, 2001. In the two weeks prior to the issuance of the release, the Hotline received 41 and 57 calls. In the four weeks after the issuance of the release, the Hotline received 70, 80, 60, and 63 calls.

Monthly Legal Facts Articles

The Legal Hotline produces monthly news articles about issues of interest to elderly Iowans. The one or two page articles are sent to approximately 70 newspapers in the state and to each of the area agencies on aging for publication in their newsletters. These articles are not published every month by the newspapers who receive them, but are used by the newspapers for fillers when they have room. Through a clipping service, Iowa Legal Aid knows when the articles get published. The articles are written about a specific legal issue of interest to older Io-

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wans, along with some concluding information that informs people about the existence of the Hotline, the services available, and the Hotline's telephone number. These articles are published without cost to Iowa Legal Aid, but they do take some amount of time each month to research and write.

It does not appear that the publication of these monthly articles had a significant effect on the calls made to the Hotline. Although the Hotline received calls from some of the counties in which the newspapers were located either during the week of publication or in the following few weeks, the numbers of calls were low enough that it was unclear whether the calls were made in response to the articles or were just part of the normal calls from the counties for the year. One distinction between these monthly articles and the press releases that the Hotline has issued is that the articles generally tend to answer most common questions that people have about the subject, while the press releases are designed to inform people of deadlines or other timely information without fully addressing all of the issues regarding the particular subject. In addition, the monthly articles tend to be articles about general subjects about which there is no specific time deadline approaching so the need for a reader of the article to call the Hotline immediately was not present. Overall, 460 of 2,815 calls received by the Hotline in 2002 involved callers who called because of seeing the Hotline's number in a newspaper.

Radio Advertisements



Iowa Legal Aid recorded two 30-second radio ads. One ad is a general ad about services being available from the Hotline, while the other ad concerns specific health care issues about which people could contact the Hotline. The general ad was run on a small radio station in Atlantic, Iowa, a town of approximately 6,000 people. The radio had a listening area with a radius of 50 miles and the ad ran three times per day for ten days. The Hotline tracked the number of calls from the county that included the radio station, plus all counties surrounding that specific county. During the four-week period that began with

the week that the ads were first run, the Hotline received four calls from Cass County, which is the county where Atlantic is located. During the four weeks prior to the running of the ads, the Hotline received only one call from Cass County. When the counties surrounding Cass County are also included, the Hotline received a total of eight calls during the four-week period in which the ads ran, while the Hotline received a total of nine calls during the previous four weeks.

The specific ad about health care issues was broadcast by a larger radio station in Waterloo, Iowa, which is in Black Hawk County, a county of 121,012 people. The station also had a listening area with a radius of 50 miles. The ad was run four times a day for one week. There were no ads the following week, and then the next week the ads were run four times a day on Monday and three times a day on Tuesday and Wednesday. The Hotline received eight calls from Black Hawk County, the county that contains Waterloo, during the four weeks beginning the first week that the ad was run. During the four weeks prior to the ads running, the Hotline had received ten calls. When the counties surrounding Black Hawk County are added, the Hotline received a total of 18 calls during the four-week period when the ads were running, and received 18 calls during the four-week period prior. The price for the ads on the larger station in Waterloo cost \$18 for each time it was broadcast. The cost at the smaller station in Atlantic, Iowa, was \$7.75 per broadcast.

Although this data from radio ads is small and additional tests need to be done, it appears that radio advertisements may have some impact on informing people about services available from the Hotline, at least when the ads are run on small town radio stations which primarily serve the local county.

Radio Interviews

Staff of the Legal Hotline have participated in radio interview programs six times during the last two years. These have normally been smaller radio stations in county seat towns, although a couple have been for a major radio station in Des Moines, Iowa. The interviews usually concerned a specific topic of current interest at the time and also informed people

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about the services available from the Hotline. These interviews were done at no cost to Iowa Legal Aid other than staff time spent preparing for and participating in the interviews. This type of outreach generated mixed results. After four of the six interviews, there was no significant increase in the number of calls. The other two interviews, however, did generate calls. For example, on the morning of April 4, 2003, KJAN radio in Cass County, Iowa, broadcast a ten minute interview about the Hotline's services and about the Elderly Property Tax Credit and Rent Reimbursement programs. The Hotline received four calls from Cass County that day in which the callers mentioned the radio interviews. The Hotline received had received only 17 calls from Cass County during all of 2001, and 28 calls in 2002.

Community Legal Education Events

The Legal Hotline engaged in numerous types of community legal education (CLE) events designed to provide education to people about elder law issues and to let people know about the services available from the Hotline. Intake information following three different types of community legal education events have been tracked. The first type of event has been one or two hour seminars at which a member of the Hotline staff provided legal education about specific legal issues and informed people about the services available from the Hotline. These events were generally sponsored by religious organizations, Alzheimers Associations, or area agencies on aging. The events ranged in attendance from 22 to more than 100 people. The impact of these events has been mixed. After some of the events, both small and large events, calls to the Hotline increased by up to 100% in the few weeks after the event, as compared to the historical number of calls for similar periods. There have been no increases in calls after some of the other events. Since most of the events have concerned health care and other end-of-life planning issues, it is unknown why calls increase after some events and not after others.

The cost of doing these events was substantial in terms of time, especially if the events were not located close to the Hotline's office. The events usually lasted one to two hours, thereby causing an ex-

penditure of time ranging from three hours to all day, depending on the distance of the event from the office. Preparation for the events was usually minimal since the subject matter of the events are usually the same, involving legal issues about health care, consumer problems and public benefits.

The second type of CLE event has been presentations about current legal issues at larger statewide conferences, such as the Governor's Conference on Aging. In both 2001 and 2002, the Legal Hotline made a presentation at the Governor's Conference on Aging about Medicaid eligibility for long term care. Although total attendance at the conferences exceed 600 people, actual attendance at the workshops sponsored by the Hotline generally amounted to approximately 100 people. The Hotline also had an exhibit table at the conferences to provide materials and brochures about the Hotline. There was no appreciable difference in calls to the Hotline in the weeks following the conferences than there had been prior to the conferences.

The Hotline has also participated in elder fairs or health fairs where the Hotline merely had an exhibit booth to distribute information to people. The two events the Hotline attended did not result in any significant increase in calls.

Public Access TV



The Legal Hotline staff presented a community legal education event concerning Medicaid eligibility for long term care to a senior program affiliated with a local hospital in Grinnell, Iowa. The hour-long presentation was video taped and was later run on local public access programs in three different communities in Poweshiek County in April 2002. One station in Grinnell, Iowa, aired the program from April 17 through April 22 at 9:00 a.m. and 5:00 p.m. A second station in Brooklyn, Iowa, aired the program at 9:00 a.m. on April 22, 2002, and a third station in Montezuma aired the program on April 18, 2002, at 1:00 p.m. and 7:00 p.m. Poweshiek County has a population of approximately 18,816. From

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April 8, 2002, through May 24, 2002, the Hotline received exactly two calls from Poweshiek County, with those two calls preceding the broadcast of the educational program. For the same time period in 2001, the Hotline received three calls from Poweshiek County. The broadcast of the community legal education program obviously did not have the desired effect of increasing calls to the Hotline.

The Medicaid videotape was also run on public access TV in Marshalltown, Iowa, in Marshall County, which county has a population of approximately 39,311. The program was run numerous times beginning April 29, 2002. Between April 29, 2002, and May 31, 2002, the Hotline received six calls from Marshall County, the exact same number of calls that the Hotline had received from Marshall County for the same time period during the previous year. Although the Hotline received only five calls from Marshall County for a similar length of time immediately prior to April 29, 2002, the Hotline had received only four calls from Marshall County for the same period a year earlier. Therefore, the increase from five calls between March 25, 2002, and April 26, 2002, to six calls between April 29, 2002, and May 31, 2002, does not appear to have been caused by the broadcasting of the program.

CONCLUSION

Although Iowa Legal Aid is continuing to track changes in the levels of calls from various types of outreach, the Outreach Demonstration Project is almost completed. The conclusion to be drawn from the data are fairly evident. The types of outreach that had the greatest impact on the number of people who call the Hotline were the press releases about specific legal issues, paid newspaper ads and the intensive outreach project that involved outreach to service providers and to the older population through brochures, posters, etc.

These methods were followed in effectiveness by the making of community legal education presentations and the publication of monthly articles about legal issues of interest to older people. Although these types of outreach were not as effective as other methods for generating calls, they fulfilled

another important function of outreach of educating people about critical legal issues that may affect them. The use of radio and television did not appear to have much consistent effect on calls received by the Hotline.

The intensive type of outreach involving outreach to service providers and the elderly and the distribution of posters and brochures caused a substantial increase in the number of calls, but that type of outreach was also the most expensive. It required numerous hours of staff time which is probably impractical for legal services agencies and other agencies in these times of declining resources. Making community legal education presentations, although sometimes very effective in increasing calls to the Hotline, is also a fairly expensive outreach method, especially when there is a substantial amount of travel time to the place of the presentation. Press releases, on the other hand, were a very inexpensive method of informing people of issues of interest to them and generated a significant number of calls to the Hotline. Paid newspaper ads were also fairly effective, and relatively inexpensive. It therefore appears that in terms of being both effective and an efficient use of resources, the use of newspapers is the best way to inform people about services that are available. The best way to use the newspapers is to issue press releases or news articles on a broad scale, including to small town weeklies and dailies, about current items of interest to people that peak people's interest about a specific subject.

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From the Frontline

*By Carol Matthews**

IN PURSUIT OF EFFICIENCY

A recent office shuffle has prompted some long needed house cleaning. For an operation that is supposed to be all computerized there seems to be an awful lot of paper. Judging by the dates on some of it, the winnowing out is long overdue: Food stamp guidelines from 1994, public benefits figures for 2001, flyers from organizations that no longer exist, outdated phone books, etc.



Some of the material we unearthed seems positively quaint. Remember AFDC? Twenty-five dollar wills? It is a bit like looking at old photo graph albums. Gee, did we really look like that! The hair, the bell bottoms, yikes! Articles from the early days of hotlines are particularly quaint. The tone is so defensive. Passionate arguments in favor of hotlines as a way to provide more, maybe better service, with the opposition insisting that the only proper legal representation was a face to face meeting between lawyer and client. The "Top Ten Myths About Telephone Intake" even cites the charge that "Advice and counsel, brief services, and referrals aren't real legal services." Today, the argument is not about whether or not hotlines can provide a useful service, but rather over ways to make them more efficient so that as many clients as possible get the level of service they need to solve their problem.



In pursuit of efficiency, at LCE we have trained intake workers to do all, or most, of the initial interview, entering demographic information in the computer before the attorney speaks with the client. The intake person also includes a one or two sentence statement of the reason for the call or the topic the client wants to discuss.

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

It is my experience that the more I know about a client before I take the call the more efficiently I can help the client. Partly, this is because my mindset will be on the right issues. I metaphorically put on my landlord/tenant hat, or my social security hat. I can also shape my advice to fit the circumstances. Low income clients will not be referred to attorneys who charge. Higher income clients need to be educated about what legal fees they may be facing. Perhaps more importantly, I can give some thought to whether the client or his problem are likely to involve a question of competence, a conflict of interest, third party problem, or other ethical issue.

The flip side of these benefits is that an unfortunately worded statement by intake staff can provoke a bias for or against the client that will turn out to be totally unwarranted by the facts. An example is a message that says the client wants to know does he have to support his wife. My knee jerk reaction is "*Oh what a deadbeat, what's the matter with him? Of, course he has to support his wife.*" After speaking with the client the answer is "*No, he doesn't have to pay his long-divorced wife's nursing home bill.*"

A good intake staff greatly reduces hotline stress but it certainly does not eliminate all surprises. Non-legal staff do not always recognize, or correctly articulate, the client's problem; the client frequently fails as well, but with amazing facility the same client who tells the intake specialist he wants to discuss probate can tell the attorney five minutes later that he wants to sue his neighbor over a fence. Many years on the hotline have shed no light on this phenomenon. I suppose this is a good thing, at least it keeps life interesting.

**Do you have a
From the Frontline
point of view?**

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