
Legal Hotline Quarterly

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A Publication of the Legal Hotline Technical Assistance Project
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Status Report:
Project for Equal Justice
Hotline Outcomes Assessment Study

The Project for the Future of Equal Justice has initiated planning for Phase II of the Hotlines Outcomes Assessment Study. The study is being conducted by an independent researcher, the Center for Policy Research, in Denver, with funding from the Open Society Institute of the Soros Foundation.

Phase II of the study will attempt to analyze the outcomes obtained by Hotline clients. It will begin with a pre-test, designed to provide an understanding of what kind of outcome information can be obtained from Hotline clients. As currently planned, the pre-test will involve interviews of approximately 60 clients who previously received services from one of two Hotlines. The interview protocol is currently being designed, and several different methods of interviewing clients are being considered.

On the basis of the information obtained in the pre-test, the Project hopes to design a broader study that will compare the outcomes for different categories of clients and cases and different Hotline models. Examples of possible questions to be considered are the following:

To reach the Legal Hotline
Technical Assistance Project:
Call: (954) 472-0997 (EST)
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www.equaljustice.org/hotline1
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1. Among various case type problem areas (e.g. divorce, bankruptcy), are there particular casetypes for which Hotlines are most likely to obtain favorable outcomes for clients? Similarly, are there certain demographic groups of clients (e.g. the elderly) for whom Hotlines are particularly effective?
3. Which types of brief services cases are most effectively resolved by Hotline staff (e.g. utility cut-off, neighbor dispute)?
4. Do certain types of Hotline staff yield better outcomes? Types considered would include paralegal, law student, volunteer attorney, inexperienced paid attorney, and experienced paid attorney.
5. Does sending a follow-up letter to the caller summarizing the oral advice given, produce better outcomes?

Meanwhile, the researcher is completing Phase I of the study, which should be available around March 1. The study will be posted on the Project's website, the Equal Justice Network, www.equaljustice.org.

Phase I focuses primarily on the impact that adopting a telephone-based intake system has on the caseload statistics of LSC-funded programs. The researcher is using the Case Summary Reports (CSR) data provided by programs to LSC to compare pre-Hotline and post-Hotline caseload statistics in programs that have adopted such systems. The analysis will track the changes in the overall number of clients served and the level of brief services (including advice and referrals) and extended services.

This part of the study is limited to LSC-funded programs because the CSR data, despite its limitations, is the only currently existing source of information concerning pre- and post-Hotline caseload levels. The researcher began by interviewing the managers of approximately 40 LSC-funded Hotlines listed in the State-by-State Legal Hotline Directory. Over

half of these had to be eliminated from the study because only one year of post-Hotline data is available or because of other factors that would have prevented comparison of pre- and post-Hotline data (for example, a change in the size of the service area; a major change in the way that CSR case category definitions were applied).

The researchers note that the usefulness of this analysis may be limited. The CSR data does not necessarily reflect the level of time and resources that a program commits to work that has a broad impact on individual clients and the client community as a whole. The pre- and post-Hotline comparability of CSR data may be compromised by changes in the way that the various categories have been defined by LSC and individual programs. The group of programs studied may not be representative of Hotlines as a whole. It excludes all non-LSC-funded Hotlines and many of the larger LSC-funded Hotlines, including those serving areas for which there are currently other, non-LSC funded providers of legal services (such as those in Connecticut, Massachusetts, Washington State, Vermont and New Hampshire) because of the lack of comparable post-Hotline CSR data.

The Phase I report will also include a summary of the interviews of Hotline managers and directors of programs with Hotline-type intake systems conducted as part of Phase I. The main findings coming out of these interviews are as follows:

- All the interviewees believe that the Hotline expanded the program's capacity, productivity and accessibility.
- Although there are often some initial staff resistance and concerns about moving to a Hotline system, these fade once the Hotline is implemented and staff experience its efficiencies.
- Many different Hotline staffing arrangements (lawyers, paralegals, law students; specialists and generalists; full- and part-time employees) and operational formats (call-back systems and true Hotlines; receptionists and automated an-

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swering) work well. The interviewees generally felt that their own systems worked well.

The study is being guided by an Advisory Committee consisting of Hotline experts and legal services advocates and managers. The members are:

Wayne Moore, Legal Advocacy Group,
AARP Foundation;

Michael Genz and John Idleman,
Legal Services Corporation;

Jonathan Asher,
Legal Aid Society of Metropolitan
Denver;

Sandy DeMent, President
Advisory Communications Systems

Susan Reif,
Georgia Legal Services Program;

MaryAnn Sarosi, Access to Justice,
State Bar of Michigan.

Julia Gordon, Senior Counsel, Project for the Future of Legal Services, is managing the project with consultant **Bob Echols**.

For additional information, contact Bob Echols at 207-833-7869 or echols@netquarters.net.



ABA/NLADA Equal Justice
Conference 2000
Pro Bono, Innovations &
New Partnerships
April 6-8th, 2000
Hyatt Regency, Houston



A legal hotlines affinity group meeting is scheduled for the morning of April 6th plus a full schedule of workshops on hotline issues:

- ◆ How to Start a Legal Hotline
- ◆ Assessing Effectiveness of Legal Hotline services
- ◆ Innovative Ways of Reaching Hard to Reach Populations
- ◆ Hotline and Pro Se Funding and Income Generation Activities
- ◆ Designing a Hotline to Handle Intake for Several Independent Programs
- ◆ Resources for Ethical Compliance
- ◆ Coordinating Hotline and Pro Se Programs
- ◆ Telephone Communication Skills for Legal Hotline Advocates
- ◆ Ethics of Hotlines and Innovative Delivery Systems

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Legal Hotline Start-Up and Operational Issues Identified by the Center for Policy Research

Implementation	Referral/Resources	Quality Control
Staffing <ul style="list-style-type: none"> • Attorneys vs. paralegals vs. law students vs. pro bono • Use of Screeners • Hotline specialists vs. rotation 	Developing and maintaining data bank of community services	Daily review of advice summaries by managing attorneys
Hours of Operation <ul style="list-style-type: none"> • All day vs. half day arrangement • 5 days/week vs. select days • Days only vs. days plus evenings and/or weekends 	Developing and maintaining web site with pamphlets, forms, and links to courts and agencies	Availability of supervising Attorney for call consultation
Languages <ul style="list-style-type: none"> • None vs. in-house capacity vs. AT&T Language Line • TTY/TDD Capacity 	Developing and offering pro se clinics	Prepared scripts and manuals for common problems
Scope of Intake <ul style="list-style-type: none"> • Hotline only vs. multiple methods 	Providing extended legal services or referral to a provider	Regular staff meetings to discuss cases, trends and problems
Managing Call Volume and Wait Times <ul style="list-style-type: none"> • Hotlines vs. “warm lines” (call back systems) 		Pairing experienced hotline staff with new staff
Legal Issues <ul style="list-style-type: none"> • All vs. select topics • Definition of conflicts 		On-going legal training
Services <ul style="list-style-type: none"> • Advice only vs. advice and brief services 		
Follow-Up Actions <ul style="list-style-type: none"> • None vs. general information pamphlet vs. personal letter summarizing advice 		
Phone Equipment <ul style="list-style-type: none"> • ACD vs. receptionist • No option for voice mail messages vs. allowed, but not encouraged vs. standard 		
Computers and Software		

Legal Help Line for Older Kentuckians



The Legal Help Line for Older Kentuckians began taking calls in January, 1999. The Help Line was established with a start-up grant from Title IV of the Older Americans Act and serves the state's 650,000 residents over 60 years of age.

History and Funding

The establishment of the Legal Help Line for Older Kentuckians was facilitated by the fact that Kentucky already had a statewide telephone information and referral service for seniors. The existing Help Line for Older Kentuckians was set-up in 1994 by the Association of Older Kentuckians (A-OK), an organization dedicated to providing access to services for seniors. That organization is the pet project of former Kentucky Governor Jones who sponsored state funding to start A-OK and keep it running. Prior to its incorporation into the Legal Help Line, the A-OK Help Line received approximately 20 calls per month, many from seniors who couldn't afford their medication. A substantial number of callers were seeking legal information and advice but A-OK was not able to provide this service, except for referrals.

In 1998, the Access to Justice Foundation submitted a proposal to the Administration on Aging for a Title IV Statewide Senior Legal Hotline start-up grant. The Access to Justice Foundation viewed the availability of Title IV funds as an exciting opportunity to build on the existing information and referral help line and leverage the statewide name recognition and credibility which the help line already enjoyed. By forming a partnership between A-OK and the Access to Justice Foundation, the new telephone service provides an innovative model for linking an existing senior citizen information and referral "help line" with a legal hotline for the elderly in one coordinated service system.

The Legal Help Line for Older Kentuckians is funded by Administration on Aging Title IV funds and state funding provided to the Access to Justice Foundation

Organization and Location

The Access to Justice Foundation, (AJF) located in Lexington, is an independent statewide non-profit organization that works closely with the 6 LSC-funded programs in the state. It provides technical support to the legal services programs, develops continuing legal education seminars, and operates a pro bono referral program, in addition to operating the Legal Help Line. It also maintains a website, (www.accesstojustice.org), with home pages for the six Kentucky legal services programs and the Legal Help Line. It offers online handbooks for lawyers, sample form letters, client education materials, schedules of meetings and CLE events. Jamie Odle Hamon is the Executive Director of AJF.

The Legal Help Line is designed on the stand-alone legal hotline model, providing legal advice and brief services over the phone. AJF does not have its own full-service unit into which clients can be referred, however the Help Line performs intake for each of the six legal services providers. Dennis Stutsman is the Managing Attorney of the Legal Help Line and serves on the intake subcommittee of the Legal Services State Planning Committee. That post has facilitated his ability to develop Help Line model intake procedures for the legal services programs.

The Access to Justice Foundation offices are located a few blocks from the small downtown Lexington area in a little boutique shopping center housing imported fashion and housewares shops, law offices, and an accounting and architectural firm. The modern offices contain a large open central area with a conference table and the AJF phone receptionist's desk. Separate offices opening from the central area house Jamie, Dennis, the hotline staff attorney, and volunteers who answer to Help Line phone.

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J a m i e
Dennis Stutsman at the Kentucky
Access to Justice Foundation

Hamon and

Staffing

Jamie Hamon, AJF's Executive Director, is responsible for the general administration of the Access to Justice Foundation. She works with the Foundation's board and advisory committee and oversees coordination with the media. She also works with the advisory committee of A-OK to coordinate its activities with the AJF.

The Legal Help Line Managing Attorney, Dennis Stutsman, spends 50% of his time handling calls. The remainder of his time is taken up supervising the hotline staff attorney and lay volunteers, preparing community education materials, developing intake protocols, organizing CLE seminars, and speaking to the public, Bar Association and other community groups about the Legal help line.

Calls are handled by either the staff attorney or Dennis. The Help Line has no paralegals. The total full-time equivalent telephone advocate coverage is 1.5.

The Legal Help Line presently has no volunteer attorneys. Volunteers work as phone intake screeners. The Help Line also has the services of A-OK volunteers. They are able to provide clients non-legal advice and referral information after the hotline attorneys have spoken with the client about his legal concerns.

The Help Line has made contact with the University of Kentucky Law School in Lexington, which has just started a civil clinic in Elder Law, to organize a program whereby students would assist with intake and research. The Elder Law Clinic may also consider taking special cases for litigation in Title III priority areas and monitor a designated nursing home in conjunction with the Long-term Care Ombudsman.

System Workflow

The Legal Help Line phones are open from 9 to 5. If a volunteer intake worker is on duty, (s)he will answer the phone, take the client's demographic information and simultaneously put it into the computer. She also decides if the call is an emergency. If it is, she transfers the call to an attorney immediately. If both David Godfrey, the hotline staff attorney, and Dennis are busy, she keeps the client on hold until one of them can take the call. If it is not an emergency, she either transfers the call to one of the attorneys or takes a message if they are both busy. Clients are called back right away if possible, but always within 24 hours. If no volunteer is on duty, the Help Line rings directly in David's office. If David is already on the line, the AJF receptionist will answer the call and either transfer the call to Dennis or take a message for David to call back. Having a human answer the phone is a priority for the Help Line, but in those instances when no one is available, the caller can leave a message on voice-mail.

The average number of calls coming in per day is 10-12. As is typical for a hotline serving a state with a largely rural population and no major urban centers, call volume was very low at the inception of the service- about 10 to 20 calls per week. The Hotline undertook a media campaign during the summer of 1999 to inform Kentucky seniors about the Legal Help Line. The publicity blitz included call-in segments on evening news broadcasts and using the "Voice of the Wildcats"- the much celebrated University of Kentucky basketball team-to publicize the Hotline on the University of Kentucky Sports

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Network. During the summer, 10 second TV and radio spots were run on the Kentucky News Network. Additionally, the Help Line ran print ads, Jamie and Dennis appeared on radio and TV programs, brochures, refrigerator magnets, bookmarks and fliers were printed and distributed to libraries and nutrition sites. Personal letters were also sent to state organizations. This intensive campaign increased the call volume from 10 calls per week to 10 per day. There is usually no wait for a call back.

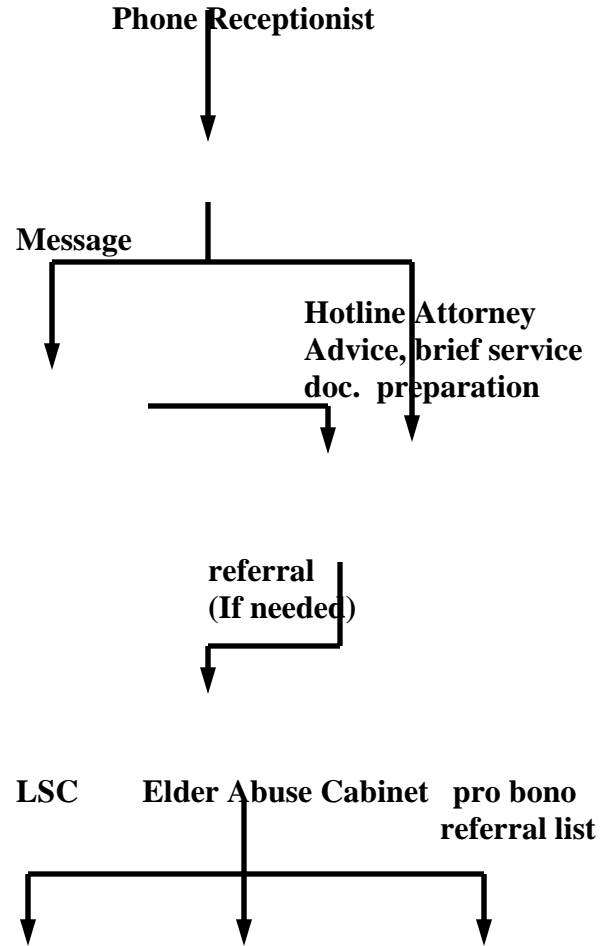
The Help Line attorneys provide telephone advice and brief services. They will also prepare powers of attorney and living wills for Help Line clients. They will sometimes draft pro se pleadings in small claims cases, responsive pleadings in domestic cases, and petitions for grandparent visitation. The Kentucky State Bar Association has issued an opinion permitting attorneys to prepare such pro se pleadings so long as they are not for the purpose of "secret representation" and the attorney signs the pleading with an indication that his services are limited to the preparation of the pleading.

Referrals

The Access to Justice Foundation has a list of 900 attorneys who take *pro bono* cases through legal services programs or who have been independently recruited through CLE events to take cases in specific areas. In appropriate cases, the Help Line gives the client names of attorneys on this referral panel in the client's county and leaves it up to the client to make the contact. The case is closed and coded as a referral. Where clients present cases needing extended services in priority areas, Dennis contacts the appropriate legal services program directly, pursuant to the intake protocols they have put in place, so that the Help Line client bypasses the individual program's intake procedures.

**Legal Help Line for Older Kentuckians
Work Flow Chart**

Incoming Calls



**Equipment
Phones**

The Legal Help Line was fortunate to acquire a donated ATT Partner Phone System with voicemail capability. The Help Line has three incoming rolling lines. A fourth line is available for staff. Additionally there are dedicated Internet and fax lines.

Software

Kemps Clients for Windows 98 was chosen for the Help Line because Dennis was familiar with it, found it to be the most comprehensive, and four of the six legal services programs in Kentucky were

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already using it. Dennis particularly likes the intake system potential and is developing standard questionnaires and advice letters which the software will generate.

Training and Quality Control

During the first week on the job the hotline attorney was given training in substantive areas and familiarized with the resources available to him. Dennis sat in on all the calls during the first week. Dennis reviews all of the hotline attorney's case notes.

Materials

AJF created a Poverty Law Overview Manual for use with its yearly training program. It includes overviews of family law, consumer issues, Social Security, housing, access to health care, and public benefits. The Help Line also has Medicare/Medicaid manuals from the Center for Medicare Advocacy, Kentucky cases and statutes on CD-ROM, and Internet access for legal research. The University of Kentucky law library is nearby.

Dennis, in conjunction with AARP Legal Services Network, is creating a Frequently Asked Questions Manual, both attorney and client versions, specifically tailored to Kentucky law.

AJF has also received a grant from the Kentucky Bar Foundation to develop self-help materials on handling Medicare appeals. Dennis is developing those brochures as well as ones directed to handling Social Security appeals. He is also developing additional *pro se* materials. Additionally, the Help Line sends callers community education pamphlets in various subject areas developed by the legal services programs

Special projects

The Help Line is developing a questionnaire designed to expand the availability of *pro bono* attorneys and prioritize unmet legal needs in Kentucky. This project involves sending the question-

naire to all 13,000 members of the Bar, all social service agencies, and legal services programs. This effort will also give attorneys a chance to sign on to the *pro bono* panel if they are not already volunteering.

AJF is also working with the Fayette County Commonwealth Attorney's Office on the Senior Protection Project. The goal is to put together an interagency program to make sure that seniors suffering financial abuse do not fall through the cracks. Dennis and University of Kentucky law professors are reviewing the power of attorney statutes in order to propose model legislation.

In a unique and exciting project, AJF is working with Ecuadorian attorneys in a private non-profit foundation to address the delivery of legal services to poor Ecuadorians.

AJF staff are also members of the statewide Legal Services health task force to shape the future of Medicaid managed-care and the ombudsman program.

Dennis and Jamie's advice for anyone interested in starting a Hotline is to establish an adequate funding base for organizing the Hotline project before applying for Title IV funds

**Legal HelpLine for Older
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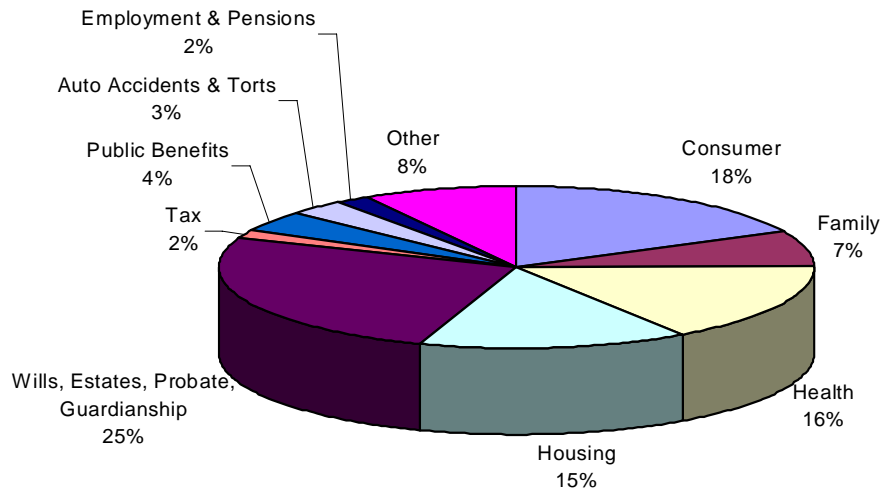
Senior Legal Hotline 1999 Productivity Statistics

The *AARP* Legal Hotline Technical Assistance Project collects reports from the statewide senior legal hotlines on productivity, costs, case-types, and referral sources. In 1999, there were twenty senior statewide legal hotlines operating in 18 states (due to the size of that state, the California program serves only the northern part of the state) Puerto Rico and Washington D.C. Results are summarized below. The hotlines in three states, Hawaii, Kentucky, and New Hampshire were start up programs which were only operational for six months of the report period and their figures were not included in the summary. You can access the complete report at www.equaljustice.org/hotlines or at the Legal Hotline Technical Assistance Library at www.povertylaw.org.

1999 Report	Range	Average (eliminating highest and lowest)
Total Cases Handled	551 – 5029	2940
Number of Full Time Equivalent Telephone Advocates	.30 - 3.0	2.2
Cases Per Hour	.34 – 3.71	1.5
Cases per Full Time Equivalent Per Year	572 – 6216	2203
Gross Cost per Case	\$27.55 – \$89.96	\$54.12

Fourteen of the Senior Statewide Legal Hotlines reported their case-type statistics for 1999

What kinds of cases were callers concerned about?



**1. Wills, Estates, Probate, and Guardianship
25% (average)**

The types of calls included in this category are: guardian/conservator; alternatives to guardians (powers of attorney); probate; wills and estate planning ; joint ownership and trusts,

This case type was the subject of the largest percentage of calls to the senior hotlines with an average of 25 %. The percentage of callers soliciting advice in these matters ranged from a low of 9.46% in Maine to a high of 45.46% in Georgia and 41.66% in Texas. If those three states are discounted from the average, this casetype would still account for an average of 20% of the calls at the remaining hotlines. This case type represented the largest percentage of calls in Georgia, Iowa, Kansas, New Mexico, Pennsylvania, Tennessee, and Texas.

2. Consumer Issues 18% (average)

The Consumer case type includes bankruptcy; collection; contracts; loans; unfair sales practices; and credit issues. It elicited the second largest number of calls with an average of 18% of total calls to the senior legal hotlines. While the percentage of Wills and Estates calls fluctuated wildly from hotline to hotline, the percentage range of consumer problems was much more narrow, with a low of 13.650% in Texas and a high of 24.29% in Kansas. Consumer problems accounted for the highest number of calls in California and the State of Washington.

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3. Health (16% average)

Calls in this category include Medicaid/Medicare/Medigap; private insurance; health-care decisions; nursing homes; Hill Burton; mental-health; and physical handicap issues.

Calls handled by the senior legal hotlines in this category accounted for an average of 18% of their cases. Maine seniors appear to be far more concerned with health issues than those in other states. This case type accounted for 40.01% of cases there. The Tennessee Hotline, on the other hand, logged only 7.65% of the cases in this category. The Kentucky, Maine, and Michigan senior legal hotlines reported the highest percentage of calls in this category, with 29.38%, 40.01%, and 21.46 % respectively.

4. Housing (15% average)

Housing matters accounted for another major source of cases handled by the senior legal hotlines. Housing calls include those involving landlord/tenant issues; government subsidized housing; mortgage foreclosures; tax sales; real-estate issues; utilities; zoning; and condominium issues. Callers in Washington D.C generated the highest share of housing calls with 27.86% while only 8.98% of the Iowa Hotline's cases involve these issues.

While these statistics are quantitative only, it is certainly possible that calling trends and sources of concern in particular geographic areas may be reflected in these case type statistics..



Websites of Interest

www.phrma.org/patients

Member companies of the Pharmaceutical Research and Manufacturers of America (PhRMA) created this online directory to help physicians identify which free drug programs patients might be eligible for. It lists company programs that provide drugs to physicians whose patients could not otherwise afford them. The programs are listed alphabetically by company. Under the entry for each program is information about how to make a request for assistance, what prescription medicines are covered, and basic eligibility criteria.

www.choices.org

Choices in Dying is a nonprofit organization dedicated to end-of-life issues. At this website you can download living wills and other advance health care directives specific to each state.

www.google.com

This is a terrific site where you can type in the name of a state plus the word 'statutes' and it will take you to the state government page to access the statutes of any state. You can also type in an act such as FMLA and it will give you links to relevant information. You can also find any federal circuit court decision available on the internet. Type in the circuit and it will bring you to links where you can read recent cases.

www.dogpile.com

This site is a kind of super search engine. It organizes information from about a dozen search engines. By performing a "metasearch" you can effectively glean hits from many of the other search engines without having to search on each one separately.

From the Frontline
By Carol Matthews*

CHOOSING THE CLIENT

Many hotlines are set up to serve specific populations, such as the poor or the elderly; or to address particular issues, such as domestic violence or healthcare rights; while others deal with sensitive issues and vulnerable populations as part of their overall operation. Stand alone hotlines will set their own priorities but hotlines that do intake for a full service office, must conform to whatever programmatic bias exists as to which clients or viewpoint the staff will represent. For instance, the program may want to provide services to the abused and not the abuser; the patient and not the doctor; the tenant and not the landlord, notwithstanding that wife beaters, landlords, and doctors have legal rights entitled to representation --but not by that program.

From the hotline attorney's perspective a case begins with a telephone conversation with a person calling for advice about a specific matter. Since the person who makes this initial call is frequently not the only party to the problem who needs help the first question must always be "who is the client?"

The answer to this may depend on many factors, the most important of which are the program's mission and priorities. But the question also raises ethical issues of conflicts of interest, client confidentiality, etc. The goal is to avoid inadvertently entering into an attorney-client relationship with a caller on the "wrong" side of a case. It is up to the attorney to do this because, after all, the caller isn't likely to see himself as an inappropriate client. It is normally the client's perception of the situation that determines whether an attorney-client relationship exists which, in turn, triggers all the obligations of confidentiality and loyalty. In many instances the issue may simply not arise because it is a case of first come, first served. If a program represents both men and women in divorce proceedings then presumably the first one to request help will be the client, assuming all other eligibility factors are equal.

There will be situations where, after asking a few questions, the hotline attorney discovers that

the caller is really describing a situation on behalf of another person who needs legal services but whose rights may be in conflict with the caller. Thus, when more than one person is involved it is important to identify the whole cast of characters before determining which one is or should be the appropriate client. Similarly, it is helpful to get all the facts before deciding what the case is about. A caller may say all he wants is a simple divorce. But suppose it turns out he really wants representation at his hearing on charges of spousal abuse where he will protest his total innocence despite a long history of domestic violence. The legal services program priorities may preclude representing defendants in such matters but, unfortunately, if his wife then requests legal help, she may have to be rejected as well because the attorney has already been made privy to the husband's case.

At Legal Counsel for the Elderly we frequently encounter a situation where it turns out that more than one family member wants to be the guardian of an elderly parent. I remember one caller who painted a very sympathetic picture of his great love for his senile mother (and for her bank account) but forgot to mention the reasons why other family members opposed his appointment. In fact, the caller thought it was extremely unfair that he should be passed over for guardian just because he had no fixed address and had been living in his car ever since his release from prison following his conviction for embezzling the family trust.

When *one* family member is seeking guardianship over an elderly person LCE legal staff may well represent the petitioner, but where several family members are competing to be appointed, the potential for conflict is so great that we must decline to represent any of them.

While it is not always possible to elicit all the relevant facts without being told too much every effort should be made to establish certain basics as early in the conversation as possible. In doing this it is useful to ask short, specific questions. Who is calling; who are the other family members; is the family in agreement; who is seeking legal help; have there been any proceedings so far; etc. Indeed many programs have detailed protocols for handling these calls. Until it is clear who will be

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the client it can be dangerous to ask open ended questions, useful as they are in other contexts. The caller also has a right to know what the program priorities are and how that relates to the reason for his call. For instance, at LCE we always tell young family members that it is our policy to represent the interests of the elderly person which may be different from those of the caller

The program may have a commitment to represent clients on one side of an issue. Most of us happen to think that parents should pay child support. So when a father calls to complain that he can't afford to make payments to his horrible ex-wife it may or may not be, depending on the program protocol, be my duty as a hotline attorney to give him the legal advice he requests, but it is unlikely that I am going to give him any sympathy. However, duty occasionally is rewarded and going through the initial process of collecting the facts, just the facts and nothing but the facts sometimes reveals a client I am really glad to help. In a recent call I found myself leaping to the conclusion that the client was just another deadbeat dad when the little fact emerged that this caller's youngest child was now 36 and the caller was still faithfully making the monthly payments but he was beginning to wonder how long he had to continue.

It is wake-up calls like this that remind us of the importance of getting all the information before deciding what the case is about and which person fits our profile of a suitable full service client. Such screening may serve to prevent being precluded from representing the "good guy" because of prior contact with the "bad guy". It may also serve to help the program decide which caller will receive full services from among other eligible callers. A program can set its own priorities but it can only effectuate them if the choice of client isn't pre-empted. But unless we get the necessary information in a timely manner we may lose the opportunity to wear a white hat.

(NOTE: The ABA Sub-committee On Legal Hotline Standards is expected to develop proposed guidelines for some of these issues)

An Open Letter In Response to Carol Matthew's Column, Fall 99 Issue

Dear Carol,

I'm writing in response to your column in the Legal Hotline Quarterly about the information that you use to work on your hotline. While I understand that new technologies can be confusing, and that we all have spent our careers working out information strategies that feel familiar and useful, I think both your computer and the internet can do quite a lot for your personal work and for your organization. The suggestions I make below do not require any special hardware or software beyond a local area network (LAN) and internet access.

While I understand the usefulness of the walls around your desk, there are drawbacks to the "information on the wall" problem. One, your walls are only so big. Two, the information on your walls probably gets out of date a lot and it's hard to keep up with replacing it.

Your computer -- NOT the internet, just your own personal computer -- should be able to handle almost all of the needs currently served by your wall. If you had all these documents in your computer, even just in your word processing program, you could use them more easily, update them more easily, and search them more easily. You could have an on-line contacts manager (a fancy name for an address book that has room for lots of information) for all of your important phone numbers, fax numbers, schedules, notes, etc. Referral lists, eligibility criteria, court schedules, and other information could all reside on your PC (most of the documents taped to your wall were originally created on a word processor, so it should be a simple matter for you to put an electronic copy in your own computer).

What's even better, assuming that your office has a local area network (LAN) and that you have a shared drive (a place where everyone can access certain files), you can keep all of the documents described above on the shared list. Then, whenever someone discovers information that needs to be updated, he or she simply updates the shared file, and then everyone in the program has access to current corrected information.

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Similarly, most practice manuals also are written on a computer, so if you can get an electronic copy, you can put the manuals on your shared drive and do word searches, which is often by far the most efficient way to find the information you need. Of course, hard-copy manuals are important too, so you can leaf through them and see what you might miss on line, but they wouldn't necessarily all have to be within one inch of your telephone.

As for the internet, there is a wealth of information available easily from the web that could help your practice tremendously. Even if you do not yet feel comfortable conducting searches for information using search engines because of the large number of hits you get, I would wager that a handful of web sites can answer a large number of the questions you might need to answer during your work week (probably a couple of government sites and a few sites run by nonprofits such as legal services support centers). You can "bookmark" these sites on your web browser (it's called Bookmarks in Netscape and Favorites in Microsoft Explorer) and go immediately to them whenever you need to update your information.

The suggestions above are only a starting point. Many legal services programs, especially hotlines, are using both their internal computer systems and the internet in many creative and progressive ways, and perhaps someone will write a much longer article soon with suggestions. In the meantime, I encourage you to talk to your colleagues about the possibilities. I suspect that one day, you will wonder how you ever staffed a hotline without the information at your fingertips that you can get from smart use of your computer and the internet.

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