Legal Hotline Quarterly

Issue No. 9 *A Publication of the Legal Hotline Technical Assistance Project* *Winter 1998*
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Life After Title IV

Five senior legal hotlines successfully competed in the 1995 Title IV grant competition for statewide legal hotline programs. They each received a three-year grant which ran through 1998. That Title IV award was the launch vehicle for three new statewide senior hotlines in Hawaii, Mississippi, and Kansas. In that same grant cycle, the Michigan and Maine senior hotlines received awards to continue and improve their programs.

The Administration held another grant competition in the Spring of 1998 and the Legal Services for the Elderly Hotline in Maine was again a winner for the forthcoming three-year grant cycle. The Legal Hotline for Older Michiganians, Elder Law Line at Kansas Legal Services, Senior Legal Hotline at the Legal Aid Society of Hawaii and The Statewide Elderly Hotline Service at South Mississippi Legal Services are now confronting survival without Title IV.

Kate White, the Manager in Michigan, reports that the Hotline has secured about $65,000 in new monies to replace the annual $89,000 they received from Title IV. This new funding includes $15,000 from the State Agency on Aging and $50,000 from the Michigan Bar Foundation.

The Michigan Hotline will continue to operate in the same manner as always, but has had to reduce their attorney hours slightly. They have also shifted some staff to their AOA Pension Rights grant. They raise small amounts from various fund-raising efforts and have a variety of small grants nd contracts which pay for part of the hotline opera-

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Please note the Legal Hotline Technical Assistance Project has a new phone number; the old number is now a dedicated fax line.

Call: (954) 472-0997
Fax: (954) 472-3633
e-mail:rose@bc.seflin.org

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Shoshanna Ehrlich, Editor

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tion. They are also dipping into their cash reserve which was created by saving all of the unrestricted funds received as well as any monies raised from the sale of publications, interest on deposits and investments.

Being a Title IV recipient helped position the hotline to secure continuation funding to the extent that it forced this Hotline, which had previously relied on an AARP start-up grant, to find partners who would contribute the matching funds required by Title IV. Those partners continue to help the hotline; their level of support has increased slightly, but they are unable to make up the difference from terminated Title IV funds. Kate continues to look for new sources of revenue to keep the program going, and wishes there were greater resources to help assist her with this. (*Please see feature on DOLLARS page 13)*

. Kate's advice to the current grantees is to budget staff time to develop a long-term continuation strategy before they run out of time and money.

The Kansas Elder Law Hotline will definitely continue to exist. According to Managing Attorney Marilyn Harp, the hotline is trying to secure $50,000 in general state funds; if unsuccessful this year, they will keep trying in subsequent years. They will also explore various fee-generating options. If the $50,000 is not forthcoming this year, the hotline may have to phase out its staff attorney, who comprises one branch of its senior hotline system, and continue with the other two branches only. The remaining branches will have senior callers directed to the off-site private volunteer attorneys or to Legal Services Title IIIB staff attorney in priority areas, for telephone advice just as before.

According to Marilyn, Kansas Legal Services would never have been able to open its Elder Law Hotline without Title IV. Now that the project is handling 200-300 calls per month, it can present its track record to the state funding avenues with a good chance of success.

Legal Aid Society of Hawaii is lucky enough to have some discretionary funds from a mandatory filing fee in the Hawaii Courts which it is using to maintain the senior hotline. LASH is committed to keeping the senior hotline operational. For the foreseeable future it will continue to operate as always. Since LASH also operated a statewide centralized intake hotline for its full-service program, keeping the senior hotline component running is not an insurmountable financial burden. One possible option for the future would be to route senior callers through the LASH intake hotline, but that wouldn't allow the seniors callers to receive the special attention they now enjoy. Currently seniors need not hold in queue, and callhandlers with special knowledge are available to take their calls. As long as the Court fees are sufficient, though, the senior hotline will continue to operate according to its original plan.

The Mississippi Statewide Elderly Hotline Service has a brand new manager, Barbara Grimes, who is just beginning an intensive effort to locate continuation funding. She is particularly interested in having the hotline launch a Medicare/Medicaid advocacy project which would help fund the hotline. Should interim funding be needed between the termination of the Title IV grant and new funding, South Mississippi Legal Services Corporation will continue to run the hotline with its resources until substitute funding is located

In the history of the statewide senior hotlines, only one (Arizona) has had to close down its operation once Administration on Aging funding ceased. All the other hotlines, whether AoA or AARP-seeded, have so far found a way to operate, although some have had to curtail hours, staff and service areas, or institute fees for higher income callers.

Addressing long-term continuation funding of the statewide senior hotline project at the conception of the hotline plan is an excellent way to assure successful long-term survival.

Implementing Case Management Systems

based on presentations made by John Kemp and Tom Karkau at the NLADA's 76th Annual Conference, Dec. 9-11, 1999 in San Antonio, Texas.

John Kemp of Kemp's Caseworks (*Clients for Windows case management software)* and Tom Karkau of Western New York Law Center *(TIME case management software)* were the presenters at a workshop on the implementation of a case management system in the legal services telephone intake setting. The information they conveyed, summarized in this article, is crucial to the successful implementation of any case management system a program selects. The presentations were designed for legal services program directors.

Mr. Kemp described the application of technology to office systems as a volume control dial rather than an on/off switch. Rather than turn on the technology switch and accept all possible technical applications to your workload, just implement those that are suitable for your needs. At some point your office may have the right amount, the volume on the dial will be comfortable for your office. You do not want the volume to get too loud.

Mr. Kemp's steps for implementing a case management system:

1. Proper preparation– make policy decisions about how the office will use the new system. You will need to decide which aspects of old data will be converted and how the conversion will be accomplished. Your team should devise an implementation schedule. Using the case management system need not be an all or nothing proposition. You may want to begin using some features of the new system, such as intake and conflicts checking, while postponing others. For example, you can wait to start generating form letters until the users are comfortable with the intake portion of the system.

2. Equipment- decide on which equipment to purchase and how it will be installed. You will also need to devise a maintenance schedule for system back-up and periodic data compacting.

3. Education- learn the case management system yourself. Once you have a thorough understanding of what the system can do, you can make good decisions about how the system can work for your program.

4. Training- train your staff to use the system in small training sessions broken down by function. Set up a teaching schedule for the staff. Do not try to teach all the functions of the system at once.

5. Troubleshooting– decide how the data will be input and who will be in charge of looking for bugs.
It is also important to maintain the quality of the data entry. To do this, each person who puts data in should have a vested interest in the data being correct. For instance, don't get temporary workers to enter data.

6. Multiple offices- inter-office use of the case management system is the hardest aspect to deal with. There are several ways it can be handled:

- Data replication- a computer in each office can be linked to the other offices and data can be updated regularly
- Floppy Disks- offices can send each other data on disks
- SQL or Database Server system– works like a mainframe. The request for information is executed on a server which only sends back the results to the requesting office. This is used mostly in wide area networks to reduce the amount of information that has to flow over the phone lines.
- PC anywhere software- the user dials into the central office computer where the work is actually being done
- Cintrix/Terminal Server– an extremely powerful piece of software that allows the user to do SQL/ Database server type of work over the internet or wide are network.
- Internet- users can send e-mail attachments to other offices
- Fax- computers can be set to print to fax machines in other offices.
- Paper– for some programs simply faxing paper between offices may be the simplest solution.

9. Custom Report Writing– this is a major issue for funding. You will need to decide what customized reports you want the system to generate .

7. Stay current- take courses in *Access* and look for other sources of information; keep up with upgrades.

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8. Clean house– when you get a case management system into your office you need to decide what *not* to do anymore. For example, you may decide to stop keeping paper files for “advice only” cases.

The worst way to automate is to think that your program should keep doing what it is doing now only faster. The best way to automate is to look through all your procedures and redesign them so the case management system will help you get to your goal of good client representation.

Tom Karkau spoke next and agreed with all the points made by Mr. Kemp. He added these thoughts:

1. When you move to an automated case management system do not consider it a passive act; you must be an active partner with the software vendor in the process and develop a sense of ownership.

2. You need to learn if the system does what you want before you install it. Staff time must be taken to learn the system. If you don’t put the time in upfront you will put more time in later when problems arise.

3. You need to name an individual who will be responsible for the system. A specific amount of time must be dedicated to system maintenance and made part of that individual’s job.

4. Your case management software is like a marriage. You must put forth the effort to make it work You need to understand how the system will impact your program. Getting rid of an improperly chosen or badly managed system is like a divorce.

The comments of both presenters drove home the concept that the selection and implementation of a new case management system requires both a thorough knowledge of the software’s capabilities and an in-depth evaluation of all office procedures and workflow to maximize the benefits in productivity and quality the system can provide.

Software Update

Status of Software Programs reviewed in the Summer ‘98 Legal Hotline Quarterly Special Software issue:

Clients for Windows
Kemp’s Case Works
2304 Sherbrooke Drive, Atlanta, GA 30354
(404) 320-7126; Fax: (404) 636-7767
Kemp’s Case Works has a new website:
http://people.atl.mediaone.net/jkemp

The software now comes in a Clients 98 version. Clients for Windows has been installed in about 170 programs.

TIME
Western New York Law Center
295 Main Street, Buffalo, NY 14203
Phone 716-855-0203; Fax 716-855-0203
www.wnylc.com

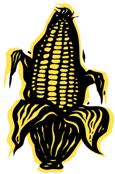
TIME has been installed in 39 legal services or related program offices.

ProLaw
P.O. Box 20628,
Albuquerque, NM 87154 ; 800-977-6529
www.ProLaw.com
In conjunction with the Michigan State Bar, 206 Townsend, Lansing MI, 800-968-6723.

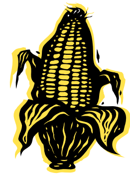
The Michigan Legal Services Computer Committee has expanded its case management pilot project to include evaluations of TIME and Clients for Windows as well as ProLaw. In January, user surveys will be sent to 3 ProLaw users, 3 Clients for Windows users, and 2 Time users to determine their satisfaction with the software. The Computer Committee will make a software recommendation in February or March, 1999.

WinCases has moved to Massachusetts:
35 Crescent St. Suite 213 Waltham, MA 02453
781-209-1130; Fax 781-209-1129
mholmes@mugwumps.com

The beta version of the new case management software will be sent to several Wamsutta users next month; after beta testing , the product, which will feature built-in multi-office connection via the internet, should be available.



LEGAL HOTLINE FOR OLDER IOWANS



The Legal Hotline for Older Iowans is a Project of Legal Services Corporation of Iowa. The Hotline's stated purpose is to expand to older Iowans' access to justice by providing free legal assistance to prevent or resolve legal problems. The hotline provides free and confidential telephone advice, brief service and referrals about most non-criminal legal questions.

History and Funding

The Iowa Hotline started taking calls in May, 1998, with a grant from Title IV of the Older Americans Act and matching funds from the Legal Services Corporation of Iowa (LSCI). LSCI decided to compete for the hotline grant as a response to funding cuts in legal services programs. The Hotline was seen as a way to extend its Title IIIB and low-income services in the face of the budget cuts.

Legal Services provides very pleasant office space for the hotline staff and pays for utilities and administrative expenses. It also contributes portions of the salary of legal services staff who participate in the hotline's work load.

Organization and Location

Legal Services Corporation of Iowa administers the Legal Hotline for Older Iowans as one of its projects. Dennis Groenboom is the Executive Director there; Scott Hartsook is the Hotline Managing Attorney. LSC of Iowa has three deputy directors and two litigation directors. Other special projects LSC of Iowa runs include the Volunteer Lawyers project, a Homeless and Mental Illness Project and a Farm and Migrant project.

LSC of Iowa serves the entire state except for the local Des Moines area which is served by legal Aid Society of Polk County. LSCI has 10 offices statewide.

The Hotline office is housed in the main office of LSC of Iowa, about 10 blocks north of downtown Des Moines. The low-income area where the building is located looks quite different from poor areas in other cities. The neighborhood is one of deteriorating but stately old homes, tree-lined streets, and little high-density housing.

The building itself, constructed by and named for the United Way is known as the "Human Services campus". The three-story, gray building with a skylight lobby is new, clean, attractive, and functional, somewhat reminiscent of community college architecture found across the nation. The Legal Services offices take up one side of a corridor, while the Hotline has a small separate suite close by. The Hotline office consists of a reception area where the phone receptionist takes calls. A small library of desk reference materials is also housed there. There is an office for the Managing Attorney, a small office for the hotline attorney on duty, and another work room which a second attorney or volunteer can use.

Staffing

The Legal Hotline for Older Iowans operates with a small staff. Scott Hartsook, the Managing Attorney, set up the hotline, handles its daily operation, takes client calls, reviews casenotes and makes educational presentations to client groups. He spends about 85% of his time working on hotline matters.

One full-time hotline attorney handles the bulk of the calls. The hotline is poised to hire an additional attorney once call volume increases. Currently, however, the hotline averages 14 calls per day from over-60 citizens of Iowa who number about 550,000.

The hotline also has the services of two volunteers attorneys who come in a total of four hours per week and a Drake Law School student who works 8 hours per week, who also handle calls. A telephone receptionist/intake worker completes the staff.

Legal Service Corporation of Iowa offices at the United Way Social Services Campus in Des Moines.

System Work-Flow

Calls are usually answered by the hotline receptionist. She inputs demographic and basic case

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information and sends the hotline attorney an e-mail message that there is a new case in the computer. She then transfers the call to an attorney, or creates a message slip if the attorneys are already on the phone. If the phone receptionist is out, the attorneys pick up calls or the hotline incoming line is forwarded to the Legal Services receptionists who take messages. Clients may also leave a voice mail message 24 hours per day.

The attorneys can answer most calls with the desk reference materials. If necessary, they will do research and call the client back. The Hotline also prepare wills, financial and health care powers-of-attorney, living wills and life estate deeds. The documents are prepared with information provided by the client over the phone. Clients can come into the office for execution of their wills; the other documents are mailed to them.

The hotline attorneys will also contact creditors on behalf of a client and may make other phone calls from time-to-time**.**

The Hotline recruited two volunteer attorneys through social contacts. They each come in two hours per week and return calls from message slips saved for them.

Scott Hartsook, Managing Attorney
Legal Hotline for Older Iowans

Referrals/Referral Panel

The Legal Hotline for Older Iowans has several revenue avenues available for clients who need additional assistance. Clients who are legal services income eligible or have a Title IIIB priority problem can be referred to the in-house Legal Services of Iowa office. Income-eligible clients with wills, consumer debt, real estate or family law problems can be referred to the Volunteer Lawyers panel, which consists of over 2800 lawyers state-wide.

The Hotline also created a special referral panel for over-income clients. Each of the 2800 Volunteer Lawyers received a letter from Scott asking if they were interested in receiving fee-paying clients from the hotline. About 600 of those attorneys signed up. Over-income clients who cannot be represented by a Title IIIB attorney are given the names of three lawyers on this non-priority panel and must make their own arrangements for appointments and fees.

Another referral avenue is the Drake Law School Clinic, which accepts clients for wills, powers-of-attorney, small claims and miscellaneous matters if their income does not exceed $35,000 per year.

Drake Law School Elder Law Hotline Project

The Drake Law School received a grant from AARP and other sources to set up a senior hotline. In a collaboration between the Legal Hotline for Older Iowans and Drake Law School, a system whereby all calls come into the Legal Hotline for Older Iowans. The Legal Hotline attorneys then refer suitable clients to Drake for further assistance by law school students who are supervised by a staff attorney at the Drake Elder Law Hotline.

Additionally the Drake Elder Law Hotline conducts educational presentations in Central and Southwest Iowa. These seminars function as outreach activity for the Legal Hotline for Older Iowans, as the Drake staff provides attendees with the Legal Hotline phone number as the point of access to legal services for clients over 60 years old.

Equipment
Phones

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The Hotline has an Executech II phone system integrated with Legal Services Corporation of Iowa. The system itself has no voice mail or queuing capability. However, the Hotline just purchased a call-messaging service from US West. If all lines are busy, or the office is closed, clients can now leave voice mail 24 hours-per-day. The hotline has an 800 line and a local line coming in but attorneys can making outgoing phone calls on three additional lines.

Software

The Hotline uses TIME software from Western New York Law Center. This system is used by the Hotline only; Legal Services of Iowa still uses TurboCases. .

Scott particularly likes the advice letter generation feature of the software. He finds it easy to navigate the screens, and makes good use of the referral attorney matching feature. He also likes the fact that unlimited casenotes can be entered and advice letters can be copied into the casenote field, for a complete file. The software has allowed the Hotline to become a virtually paperless office. Paper files are only maintained for cases where clients have sent in documents to review or documents have been prepared for the client.

The Hotline is serving as a *de facto* LSCI pilot project for the new software whose use may be extended to the full-service offices in the future.

Training and Quality Control

New attorneys receive training in using the software and how to make referrals. Substantive training is informal, on a case-by-case basis. This is usually accomplished in discussions between Scott and the hotline attorney. Scott reviews the casenotes sporadically, relying instead on oral consultation with the hotline attorney, in cases on which she has a question. He does review all the volunteer attorney casenotes.

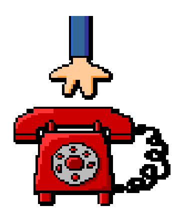
Materials

The Hotline reception area library contains the Volunteer Law Project Manuals. These contain information on the usual legal services-type subject matter that the hotline attorneys can review in giving advice. They are updated yearly by legal services staff.

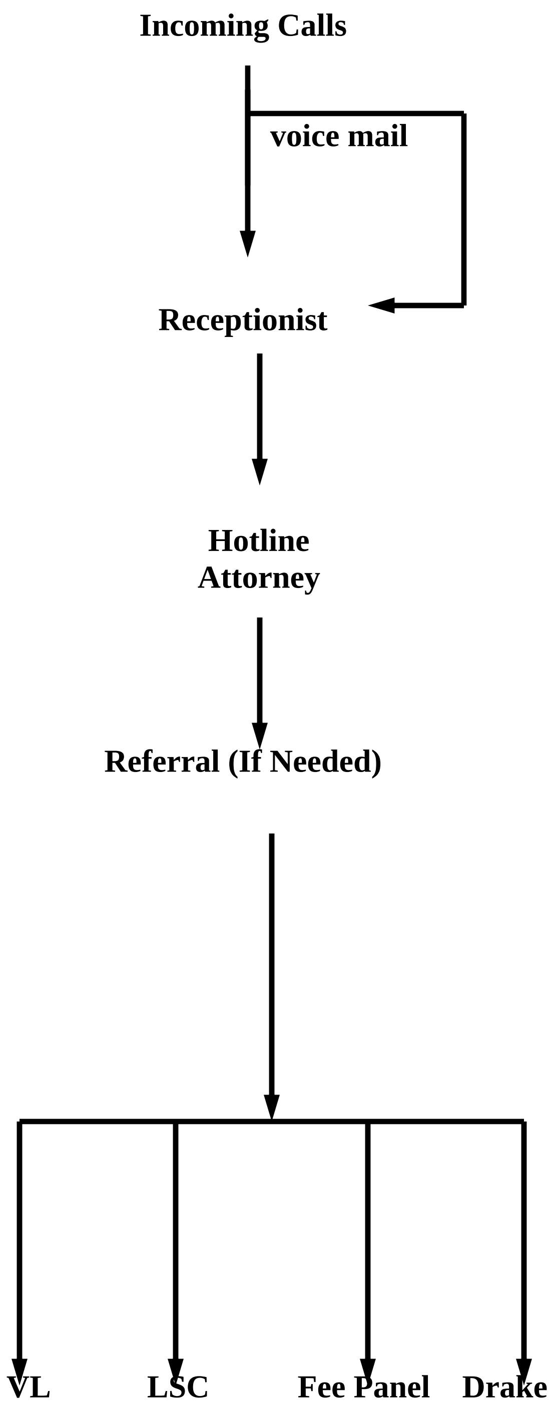
Scott is also continually adding to a Hotline Resource Manual as information on relevant topics is gathered. All the hotline computers can read the Iowa Statutes on CD-ROM but internet access is limited to the legal services litigation directors. The Iowa Statute books are available in the hotline office.

Hotline clients are mailed a large variety of educational pamphlets prepared by Legal Services Corporation of Iowa including ones on consumer issues, family law, housing, medical rights, public benefits, and guardianship. The Hotline is working on additional information sheets to be sent out with client letters.

The main problem faced by this hotline, low-call volume, in not unusual in essentially rural states. Areas without large metropolitan areas (even greater Des Moines has only about 350,000 people) face a particular outreach and education challenge to make sure their hotline is fully utilized.



Legal Hotline for Older Iowans Work-Flow Chart



Websites of Interest

www.equaljustice.org

The website of the Project for the Future of Equal Justice contains the Legal Hotline Technical Assistance Project internet presence. Here you will find online versions of current editions of the Legal Hotline Quarterly, Legal Bulletin, State-by-State Directory, Hotline Profiles and other hotline-related information.

It provides links to the National Clearinghouse Legal Hotline Technical Assistance Library.

www.nclsplp.org.

The Legal Hotline page of the Equal Justice site has its own private interactive web board where you can read or post information, requests for technical assistance, and run ideas by your hotline colleagues.

www.lsc.gov

This is the website of the Legal Services Corporation. The site includes Acts and Regulations relevant to the Legal Services Corporation, website addresses for legal services programs, and information about grants and competitions. The grants section contains guidelines for legal services programs and centralized telephone intake, including evaluation criteria for the telephone intake unit.

www.whitehouse.gov/WH/EOP/OMB

This site contains the full text of circulars from the office of Management and Budget. Circular A-122 describes cost principles for non-profits receiving federal grants. Circular A-110 explains the uniform administrative requirements for non-profits awarded federal grants. These two OMB cir-

A Hotline By Any Other Name

If your program is planning a telephone advice unit, naming it may be a dilemma. The target audience of the Legal Hotline Quarterly is any program, whatever its name, which provides legal advice and information by telephone at the time the client contacts the program. A legal hotline provides answers to clients' legal questions, analysis of clients' legal problems and advice on solving those problems, so that cases can be resolved during the phone consultation or soon thereafter. Hotlines may perform brief services likely to solve the problem and make referrals to suitable programs where further legal assistance is necessary. Some legal hotlines stand alone, while others serve as centralized telephone intake mechanisms for full-legal service programs. However agreement as to a name for this model is elusive, and perhaps unnecessary.

The term Legal Hotline was coined when *AARP* launched its first senior statewide telephone service in 1985. The Pennsylvania prototype was christened "Legal Hotline for Older Americans" and the *AARP*-seeded hotlines in Texas, Michigan, Ohio, and Florida followed suit. The name "legal hotline" was adopted in the language of Title IV of the Older Americans' Act and has proved particularly popular among the senior hotline programs.

Legal Services Corporation embraced the telephone-delivery model as a way to streamline intake and serve more clients in a full legal services setting. It dubbed this system "centralized telephone intake and delivery."

Both terms are useful but neither is perfect. "Legal Hotline" is concise and catchy but carries overtones of crisis and midnight staffing. The Technical Assistance Project relies on this term because of its long tradition and descriptive shorthand.

**Special thanks to John Eidleman of Legal Services Corporation for his valuable input.*

"Centralized Telephone Intake and Delivery" lacks the linguistic *panache* of "legal hotline". The term emphasizes the telephone unit's function as the point of access to a constellation of services, but understates the importance of the information, advice and brief services function of the telephone intake unit, where, in fact, most of the programs' cases are handled and closed.

Programs nationwide have applied creative approaches to the naming dilemma. Acronyms range from those vaguely reminiscent of pain syndromes (*CARPLS),* morning warblers *(LARC),* and personal protection (*SHIELDS),* to cardiac emergencies *(CLEAR)!*

The perfect name would identify the target population and convey that the nature of the service they will receive is telephone legal advice during normal business hours, all in a linguistically elegant package. A tall order! No wonder unusual variations abound.

One program decided to apply the scientific method to the naming problem. The Senior Citizens Law Project of New Hampshire Legal Assistance, whose Title IV statewide senior legal hotline will open March 1, 1999, conducted a small survey to help them settle on a suitable name for their service. As a result of the survey, the program selected "Senior Citizens Law Project Advice Line" as its name. The survey listed various typical hotline questions and asked the audience to choose whether they would call a "legal hotline" or a "legal advice" line for help. A total of 45-50 surveys were distributed at three different Alzheimer's and other support groups for caregivers. The age range of the caregivers completing the surveys was mainly from the early 50s to 94 years old. In all, Velma McClure, the Manager of the newly named Advice Line, collected 37 surveys. The survey questions and the results are printed on the following pages.

The Project's stated purpose in conducting the survey was to gain a better understanding of whether or not the name of the service would have an impact on accessibility. For example, they hypothesized that calling the service a "Hotline" might intimidate people who don't see their legal concerns as emergencies. Also hypothetically, individuals who perceive their programs as serious may not think a

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Legal Advice Line is serious or professional enough to adequately meet their needs.

Most of the respondents in the tiny sampling indicated they were more inclined to call a “Legal Advice line” rather than a “Hotline” for all the sample problems listed. On the other hand, once the referral sources, outreach, and word-of-mouth take hold, clients find their way to the service no matter what the name. Judging from the casetype statistical reports collected by the Technical Assistance Project for the last decade, the vast majority of cases handled by the senior legal “hotlines” bear non-emergency casetypes such as wills/estates or consumer matters. All the telephone advice programs, whether dubbed ‘hotlines’, “advice” lines, ‘education lines” or “centralized intake systems” routinely receive and handle emergency calls.

New programs understandably want to select names which will present and promote their project’s goals. Market research may prove a useful and fun tool for facing the challenge of giving your service a snappy new name.

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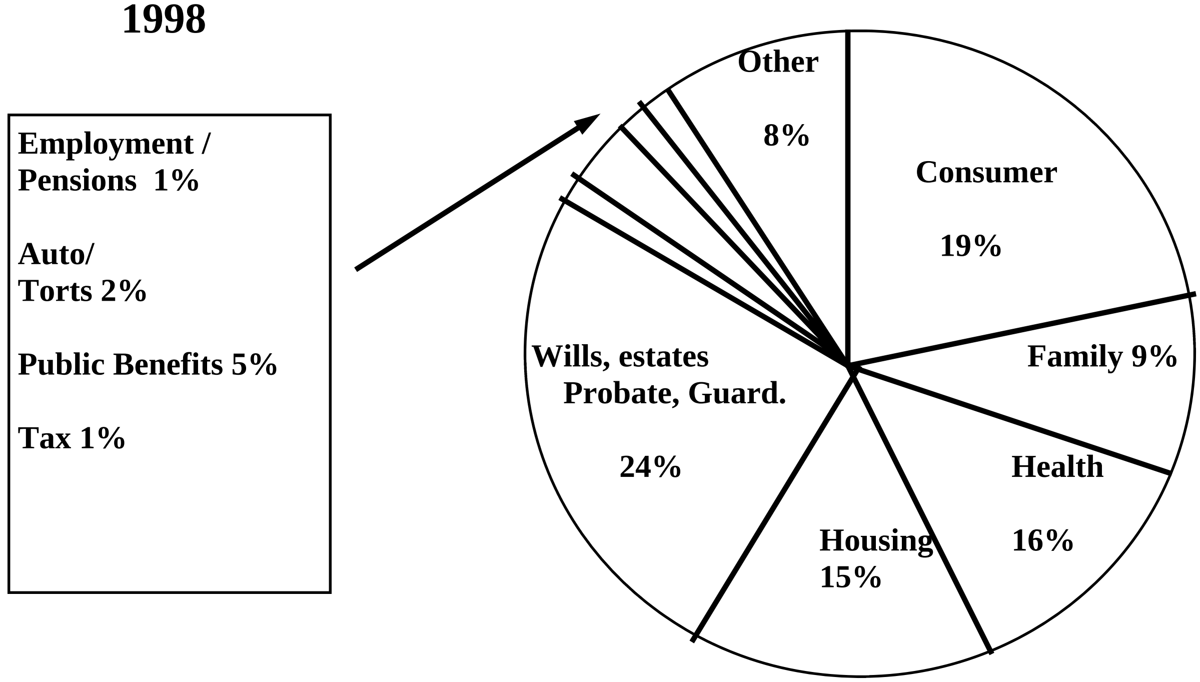
“Good Morning, you have reached the Hot Legal Advice, Centralized Education,
Coordinated Referral,
Statewide Information, and
Tri-County Intake Line
(HLACECRSITCIL),

How may I help you?”

Senior Legal Hotlines % of Cases by Type
1998

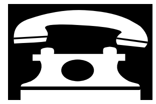


New Hampshire Legal Assistance Senior Survey- Results from 37 Completed Surveys

(1) Please read the following concerns. Decide what you would do to seek assistance in each of the circumstances. Please place a check mark in the appropriate box following the concern.

If you had the following concerns:	Which of the following would you do?				
	Call a Legal Hotline for Seniors	Call a Legal Advice Line for Seniors	Call either a Hot-line or an Advice Line	Call no one, this is not a legal problem	Other: Please be Specific
Your daughter-in-law has custody of your grand-children and she won't let them visit you.	4	23	4		2
Your property taxes are due and you don't have enough money to pay them on time.	4	18	5	1	8
The nursing home where your spouse lives tells you (s)he can no longer stay there because (s)he hit an aide.	9	13	12		2
You read an article in the newspaper about Power of Attorney and wonder whether you may need one.	5	25	6		3
Your neighbor installed a new fence that is partly on your property.	4	17	3		9

New Hampshire Legal Assistance Senior Survey-
Page Two of the survey yielded only 16 responses, possibly because questions 2-3 required written answers.



(2) What types of problems do you think would most likely be handled by a Legal Hotline for Seniors?
Total number of responses to question 2 = 14
Of those 14 responses, breakdown is as follows:

- **8 respondents indicated that a legal hotline was for crises or emergency or serious matters;**
- **3 respondents indicated that a legal hotline handled money matters, including threats by bill collectors, and taxes.**
- **2 responded that a legal hotline would provide information on finding the proper resource or where to get legal advice.**
- **1 responded they were not sure what a Legal Hotline did but would love to have help when they were at a loss about what to do.**

(3) What type of problems do you think would most likely be handled by a Legal Advice Line for Seniors?
Total number of responses to question 3 = 15
Of those 15 responses, breakdown is as follows:

- **Wills and Powers of Attorney matters: 8**
- **Non-emergencies (no topic mentioned) : 2**
- **Whether or not to proceed legally : 1**
- **Anything that might have time constraints or future repercussions: 1**
- **General questions for advice in making decisions: 1**
- **General information on such problems as housing, health care: 1**
- **Areas needing legal person to help make life choices: 1**

(4) If you had a legal concern that you did not think was an emergency would you call a Legal Hotline for Seniors?
Yes: 6 **Other: 1 (call own atty)**

(5) If you had a legal concern which you though was an emergency would you call a Legal Advice line for Seniors:
Yes: 7 **Maybe: 1**
NO: 7 **Other: (call own attorney)**

DOLLARS : A Funding Resource
The Project for the Future of Equal Justice

The Project for the Future of Equal Justice (PFEJ) has initiated the DOLLARS for Equal Justice program to expand resource development in the low-income civil legal assistance community. The Project for the Future of Equal Justice is a joint initiative of the National Legal Aid and Defender Association and the Center for Law and Social Policy. It is funded by grants from the Open Society Institute and the Fort Foundation. Its mission is to strengthen and expand the availability of legal assistance to low-income people through collaboration among legal services programs, the private bar, social service and community organizations, law schools, courts, state and national advocacy programs, as well as low-income people themselves.

The website for the Project for the Future of Equal Justice, entitled the Equal Justice Network, (which provides a home for the Legal Hotline Technical Assistance Project news, documents and webboard) has now launched DOLLARS. DOLLARS is developing national funding strategies that will support a comprehensive, integrated state-based delivery system. It also plans to test funding models in several states through the PFEJ’s State Planning Partnership initiative. The PFEJ hopes to achieve a collaboration with a wide range of partners in the non-profit, governmental and private sectors.

DOLLARS will by guided by the PFEJs Resource Development Advisory Council. The Council includes a diverse groups of volunteers from major non-profit organizations, religious institutions, foundations, corporations, private law firms, bar associations, state bar foundations, universities, local providers of legal assistance to low-income persons and national legal advocacy organizations.

The Advisory Council will consider these objectives:

- Creating a national public awareness message to educate the public about the indispensable service and impact of organizations that deliver civil legal assistance to low-income persons.
- Educating foundations and corporations about the importance of funding the legal assistance system.
- Raising money from lawyers to support legal assistance and expanding fundraising beyond the legal community.
- Cultivating stronger volunteer leadership in fundraising for legal assistance.
- Assisting the states in developing coordinated, diversified funding strategies to support a broad range of legal advocacy through the state.
- Researching and applying successful fundraising strategies used in other non-profit service provider systems.

The Advisory Council is now in the process of determining priorities for these objectives and designing strategies to assist the Equal Justice staff in implementing them.

The PFEJ website provides a vehicle for sharing information about funding resources. There are several national clearinghouses for fundraising assistance posted on the web site:

- The Fundraising Project of the Management and Information Exchange (MIE) offers technical assistance and consulting throughout the country in a variety of fundraising areas. For more information, contact Patricia Pap, 617-227-2686 or e-mail: ppap@capecod.net
- The American Bar Association's Project to Expand Resources for Legal Services (PERLS) provides information , research, and technical assistance for legal services fundraising. Technical Assistance on many fundraising initiatives is available by phone, fax, or e-mail. PERLS has available the 1998 edition of *Innovative Fundraising Ideas for Legal Services* and *A Chart of Significant Fundraising Activities for Legal Services*. For information and assistance, contact Meredith McBurney, PERLS Project Director at 303-329-8091 or e-mail: mm8091@aol.com
- NLADA broadcasts *Advocacy Funding Fact$* via e-mail and fax. It also provides direct technical assistance to NLADA members. For more information contact Project Coordinator Shari Dunn Buron at 202-452-0620 ext.20 or e-mail: s. dunn@nlada.org

Visit the DOLLARS page at the Equal Justice web site: ***www.equaljustice.org/funding.htm.*** There are many other terrific resources available at ***www.equaljustice.org,*** including sections on **Technology, Training, Innovative Services (**which houses our Legal Hotline page), **Resource Development, State Advocacy,** and much more.

From the Frontline

by Carol Matthews*

SUPERVISING THE HOTLINE

Just about every employee has a supervisor and remarkably few people have anything good to say about theirs. Hotline attorneys are no exception. No doubt this is because it is a supervisor's job to point out errors and shortcomings and few of us like to be on the receiving end of these observations. But, since few of us are perfect, some on-the-job-criticism is inevitable. It is only "constructive" criticism, we are told, and it is for our own good. If it is so good for us why does it feel so bad ? This column addresses the question of what makes a good supervising attorney for a legal hotline.

The role of a supervising attorney for a hotline is twofold: to ensure a quality work product from the hotline and to provide on-the-job training for the hotline staff. It is all too easy to assume that meeting the first goal automatically achieves the second. In an ideal world this would be true but in practice it seldom works like that. From the viewpoint of the hotline attorney, the fault often lies with the failure of the supervisor to remember a few basic rules.

The most fundamental principle underlying all supervisory roles is that it is the work product that should be criticized, never the person. The hotline attorney may have given a client the wrong advice but he or she is not a bad lawyer, let alone a bad person. Remind the attorney that the applicable statute of limitations is three years, not five, but don't imply that only a stupid, incompetent nitwit of a lawyer would make such a mistake. Nor does speculation as to what 5th rate law school he attended qualify as constructive criticism. It is counter productive to tell a person he is incredibly stupid, and in the next breath, demand superior performance in the future.

Regular procedures for reviewing hotline cases should be established and followed. Necessary corrections should be communicated to the hotline attorney promptly, both to be sure the client is not left with the wrong advice but also because it will be more effective while the matter is still fresh in the attorney's mind. Ideally, this means reviewing cases on a daily basis. When assessing the adequacy of the advice given much will depend on the completeness of the case notes. If the case notes are not sufficiently detailed to make a determination about the appropriateness or completeness of the advice the supervisor should review the case with the hotline attorney. New hotline attorneys will need some coaching as to how much of any given client conversation needs to be made part of the record. If the supervisor has a mental checklist for certain types of cases it should at once become a written down and posted on the wall checklist. (*For some suggestions on casenote guidelines please see Legal Hotline Quarterly Issue 6, Spring 1998, "Casenote Considerations).*

A second principle of supervision is that adverse criticism should be made in private. There are many systems for doing this and each program can choose what works for them. Private notes, chats, e-mail are all possibilities. Above all, the mistakes of one attorney should never be used as an object lesson for the rest of the staff. Nobody liked that technique in law school and nobody likes it now. If there is a widespread problem it should be dealt with in a staff meeting or by memo.

A supervisor's job should entail more than just catching mistakes; it should also produce better hotline attorneys. Those of us on the hotline expect a supervisor to be a good resource as well as a safety net to catch mistakes. This means that a supervisor should be an attorney with substantial grounding in the areas of law the hotline handles. We don't demand a walking hornbook of legal lore but a good supervisor should have some legitimate claim to the superior position. We all find it hard to take correction from people who know less than we do. Lawyers are also notoriously bad at accepting criticism from non-lawyers. If non-lawyers supervise some aspects of a hotline they should take care to keep the distinctions between administrative and legal tasks clear.

Hotline attorneys are helpful people by nature and want to give clients the best advice possible. We also share a normal fear of being blindsided by questions about something we know nothing about. This makes us extremely amenable to ongoing training. One excellent but seldom used training technique is praise. When a tricky problem is dealt with exceptionally well, say so. Compli-

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ment the attorney who is particularly effective with a difficult client. This does more than just make the attorney feel good. It builds respect, trust , and confidence and instills a desire to keep on doing a good job. Hotline attorneys, like all of us, learn better from positive than negative reinforcement. Put another way, it is more effective to build on strengths than to attack weaknesses.

A hotline attorney needs supervision to ensure quality, continuity, and education. Hotline attorneys need a lot of support from the program. Life and legal advice move fast on a hotline and time is a luxury not often available. Both the supervisor and the hotline attorney need to be in close communication in order to deliver a quality service. The relationship should be based on mutual respect, a clear understanding of what each job requires, and when all else fails, a really good sense of humor. *DISCLAIMER: All hypothetical supervisors mentioned herein are entirely fictional and bear no resemblance to the author's actual supervisors, past or present.*

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

ABA/NLADA Equal Justice Conference: Legal Hotline Workshops

If you are a legal hotline manager or planner, Tampa is the place to be from May 6th-8th. Here are some of the workshops planned on legal hotline topics:

Technology Showcase
Standards for Legal Hotlines
Hotlines and Pro Se
Rural/Special Populations
Funding for Legal Hotlines
Telephone Skills for Legal Hotline Staff
How to Start a Hotline
Measuring Outcomes
Best Practices
Hotline Roundtable Discussions

For registration information contact the Equal Justice Conference Office at:
(202)452-0620 ex.40
The conference site is the Westin Innisbrook Resort in Palm Harbor. This location is about 20 miles from Tampa, so it's best to make your reservations at the Westin Innisbrook Resort, rather than a less inexpensive hotel in Tampa. Conference Rates are $110 per night.
Phone: 727-942-2000

Sounds Great! Can't hardly wait!