

SENIOR LEGAL HOTLINES

ANNUAL REPORT

OCTOBER 1, 2003 - SEPTEMBER 30, 2004



*Technical Support for Legal Hotlines Project,
Supported by the U.S. Administration on Aging*

and



Contents

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Summary

Twenty-four statewide senior legal hotlines took calls from seniors in 2004. The AARP Foundation Technical Support Project collected statistics from 23 of these programs. Legal Services of North Dakota joined the report for the first time while the Senior Legal Hotline at Legal Services of Indiana closed at the end of 2003, after their initial Title IV grant cycle was completed. Furthermore, the Administration on Aging did not publish a Request for Proposals for senior legal helplines this year because all monies were already allocated to the twelve programs in current grant cycles. Hence the total number of senior legal hotlines remained the same in 2004 as in 2003 as did the number of programs that were kind enough to participate in statistical collection for this report.

The objectives of this extensive collection and analysis effort are twofold:

(1) Creation of benchmarks and parameters for legal hotline planners

It is hoped that the data published in this report serve as a useful guide for hotline designers to estimate how much staffing they will need, how much money to allocate to running the hotline, and how many cases they can expect to handle with their allocated budgets.

(2) Creation of self-evaluation measures for existing senior legal helplines

By comparing productivity and cost to other hotlines doing similar work, the data can assist hotline managers to determine whether their efficiency falls within the benchmarks, pursuant to their program objectives. For example, a lower number of cases handled is consistent with an increase in time spent providing brief services for clients. If the program does few brief services but falls below the benchmarks, the hotline manager will be alerted to examine operational procedures.

This year the 23 reporting senior hotlines handled over to 100,000 calls and almost 67,000 cases. More than 53,800 households were served. This year AARP Foundation, in conjunction with the 23 participating hotlines, refined the annual report to collect certain measures the participants deemed important. These included tracking:

- The number of cases closed with telephone advice: 46,000 of the 67,000 cases handled
- The number of cases closed with a brief service (letter, phone call to a third party, legal research, review of documents, help filling out forms): 7,509 of the 67,000 cases
- The number of cases referred for additional free legal representation: 7,046 of the 67,000
- The number of seniors reached through workshops and outreach efforts: 33,000

We also looked more closely at the impact of brief services on the number of cases a full-time hotline advocate could handle per year. Our analysis shows that average number of cases closed changes dramatically when hotline attorneys spend 25% or more of their time performing brief services in addition to telephone advice.

- 1,327 per FTE for all reporting hotlines
- 1,546 per FTE at hotlines that spent 10% or less of their time doing brief services
- 1,513 per FTE for hotlines that did between 10-25% brief services
- 677 per FTE for hotlines that did equal to or more than 25% brief services

AARP Foundation and the participating hotlines also undertook a reorganization of the case type reports to more accurately reflect the types of cases seniors are calling their legal hotlines about. Historically, about 20% of the senior hotline cases had been recorded as Wills/Estates. This case type

included crucial matters such as powers of attorney both financial and health care, living wills, and other means of planning for incapacity. The Wills/Estate case type did not differentiate the large number of calls related to these types of advance directives from those related to wills. This year, we added a case type called “advance directives” in an attempt to capture and reflect those cases. The system is still being refined as the programs will need to adjust their data collection in the upcoming year based on this year’s collection experience; many will need to program a new case type for advance directives into their reporting system.

The most frequent case types in 2004 were:

- Consumer Matters: 14,000+
- Wills and Estates: 9,000+; additionally 2,420 advance directive cases were identified by those of the programs that had that case type in place this year.
- Health related matters including Medicaid: 8,420
- Housing: 7,957+

Eighteen of the hotlines also provided the costs of operating the service:

- Average cost of operation for a statewide senior legal hotline was \$195,374 with a range of \$46,670- \$335,630. The low cost of the Hawaii Senior Legal Hotline was due, in large part, to the fact that the senior hotline shares the infrastructure of the statewide low-income legal hotline.
- Average cost per case was \$67.03 with a range of \$25.02-\$344.47
- Average cost per call was \$41.64 with a range of \$10.80-\$267.89

The variances in costs per case/call reflect the volume of cases handled by a particular program as well as the amount of time devoted to brief services and other activities which lower the number of cases a hotline is able to handle.

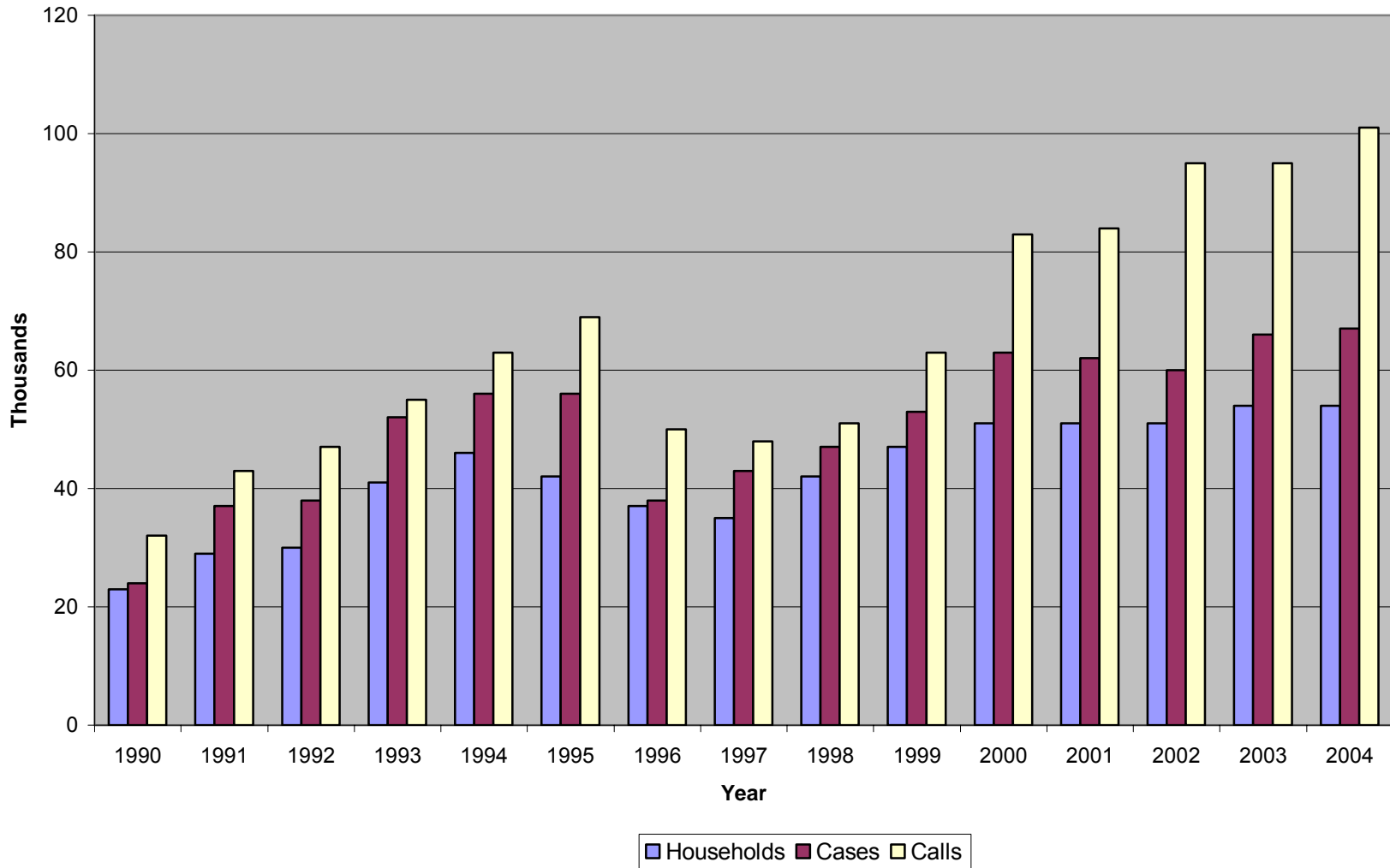
AARP Foundation continued to provide technical assistance to legal hotlines with a grant from the Administration on Aging. The Technical Assistance Project provided on-call technical assistance to the senior legal hotlines, legal aid hotlines and programs planning hotlines. The Project also provided consultation to law students, researchers, and writers working with elder law issues. Finally, the Project publishes the Legal Hotline Quarterly and collects hotline related documents for cataloging at the National Center on Poverty Law Legal Hotline Technical Support Library. The searchable Legal Hotline Directory and all legal hotline documents can be found at www.legalhotlines.org.

The Project, with the participation of AARP Foundation Programs and AoA staff, developed workshops and meetings for the National Aging and Law Conference in October 2004. The Project Director is a member of the workshop planning team for the ABA/NLADA Equal Justice Conference. This year it will be held in May 2005. As in the past, AARP Foundation is developing a track of hotline-related workshops for the conference.

The Project manages two interactive Technical Support email groups at legalhotlines@lists.lstech.org and seniorhotlines@lists.lstech.org. Technical assistance queries posted there are answered by Project Staff as well as by other experienced legal hotline managers. The Project can be reached at 954-472-0997 or sehrlich@aarp.org.

Growth in Thousands

Households, Cases, Calls



Productivity (23 Hotlines)

12 Month Productivity, part 1

(See related notes on page 8)

FY 2004	Totals		AZ	CA	CT	DC	GA	HI	IA
HOUSHOLDS, CASES and CALLS									
Total Households Served	53,883	total	2,729	6,259	772	2,317	3,940	1,492	2,825
Total Cases Closed	66,782	total	2,785	7,387	899	3,121	4,172	1,865	3,158
Total Cases Closed with Advice or Information	45,903	subtotal	2,495	6,608	681	1,771	2,887	1,250	2,753
Total of Cases Closed with Brief Services	7,509	subtotal	276	779	218	143	1,147	354	303
Total of Cases Referred	7,046	subtotal	14		17	1,628	14	261	140
Total of Calls Handled	100,558	total	8,048	15,734	1,156	2,543	7,927	4,323	3,023
OUTREACH VIA WORKSHOPS, OUTREACH ACTIVITIES, PRESENTATIONS, ETC.									
# Seniors Reached	32,759	estimate			6,000		175		357
PAID ADVOCATES									
# FTE Paid Advocates	1.84	average	1.50	5.00	2.50	1.50	3.44	1.50	1.70
% of full-time spent on									
Handling calls	68%	average	85%	50%	40%	95%	60%	95%	69%
Outreach	5%	average		5%	10%	2%	2%		5%
Preparing materials	5%	average		5%	5%	3%	1%		5%
Brief Services	13%	average	10%	10%	40%		35%		20%
Trainings	3%	average	5%	5%	2%		1%		1%
Other	6%	average		25%	3%		1%	5%	
VOLUNTEER ADVOCATES									
Total Cases Closed by Volunteers	4,441	total		2,467			49		145
TOTAL COST OF HOTLINE									
Total Cost of Hotline	\$3,516,729	total	\$100,000	\$335,630	\$309,679		\$174,669	\$46,670	\$169,108
	\$195,374		average of 18 hotlines who reported total cost						
Average Cost per Case	\$67.03	average	\$35.91	\$45.44	\$344.47		\$41.87	\$25.02	\$53.55
Average Cost per Call	\$41.64	average	\$12.43	\$21.33	\$267.89		\$22.03	\$10.80	\$55.94

Productivity (23 Hotlines)

12 Month Productivity, part 2

(See related notes on page 8)

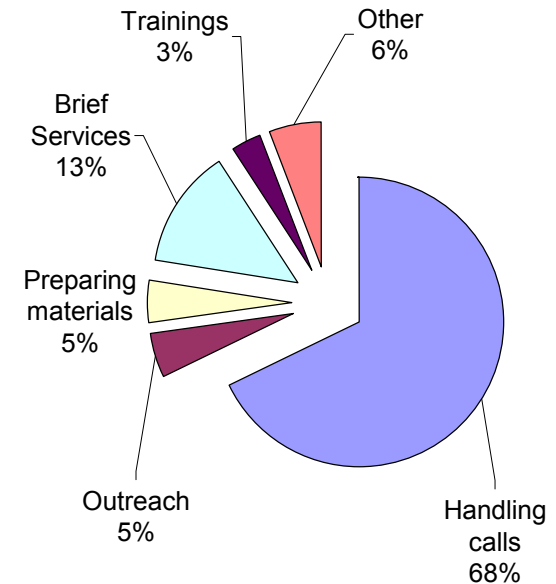
	ID	KS	KY	MD	ME	MI	ND	NH	NM	OH	PA
HOUSHOLDS, CASES and CALLS											
Total Households Served	2,018	1,718	1,828	1,603	1,699	4,724	1,338	1,223	3,714	4,866	546
Total Cases Closed	1,780	2,147	2,234	2,004	1,973	5,465	1,633	1,234	7,266	5,613	559
Total Cases Closed with Advice or Information	1,680	2,147	1,945	1,711	1,626	4,703	673	665	4,508	4,872	245
Total of Cases Closed with Brief Services	87		289	161	347	363	24	87	1,754	121	67
Total of Cases Referred	5			1,005		399	775	159	1,004	568	247
Total of Calls Handled	2,160	2,987	3,998	2,625	5,524	6,831	1,633	1,590	11,116	5,680	577
OUTREACH VIA WORKSHOPS, OUTREACH ACTIVITIES, PRESENTATIONS, ETC.											
# Seniors Reached	750		2,001	373	1,150	10,700	7,716		758	100	
PAID ADVOCATES											
# FTE Paid Advocates	1.50	0.25	1.25	2.20	2.20	4.00	1.00	1.20	2.80	1.30	1.00
% of full-time spent on											
Handling calls	76%		75%	80%	66%	75%	75%	85%	50%	93%	75%
Outreach	4%		5%	5%	12%	5%	5%		25%	1%	12%
Preparing materials	3%		5%	5%	4%	5%	5%		5%	1%	11%
Brief Services	10%		10%	5%	12%	5%	5%	15%	15%	2%	
Trainings	5%		5%	5%	3%	5%	5%		5%	3%	2%
Other	2%				3%	5%	5%				
VOLUNTEER ADVOCATES											
Total Cases Closed by Volunteers		1,288				204				285	3
TOTAL COST OF HOTLINE											
Total Cost of Hotline	\$196,073		\$145,000	\$310,835	\$296,056	\$324,711	\$54,600		\$245,980	\$220,382	\$100,659
Average Cost per Case	\$110.15		\$64.91	\$155.11	\$150.05	\$59.42	\$33.44		\$33.85	\$39.26	\$180.07
Average Cost per Call	\$90.77		\$36.27	\$118.41	\$53.59	\$47.53	\$33.44		\$22.13	\$38.80	\$174.45

Productivity Advocates' Time Spent (Combined Averages)

12 Month Productivity, part 3 (See related notes on page 8)

	SC**	TX	WA	WV	WY
HOUSHOLDS, CASES and CALLS					
Total Households Served		5,068	2,197	797	210
Total Cases Closed	630	7,551	2,265	779	262
Total Cases Closed with Advice or Information	630		1,556	270	227
Total of Cases Closed with Brief Services			709	280	
Total of Cases Referred		121	509	145	35
Total of Calls Handled	691	8,639	2,390	1,020	343
OUTREACH VIA WORKSHOPS, OUTREACH ACTIVITIES, PRESENTATIONS, ETC.					
# Seniors Reached	1,233			400	1,046
PAID ADVOCATES					
# FTE Paid Advocates	1.00	2.34	1.50	1.25	0.50
% of full-time spent on					
Handling calls	34%		50%	25%	75%
Outreach	5%				
Preparing materials	25%			15%	
Brief Services	0%			50%	25%
Trainings	10%			10%	
Other	26%		50%		
VOLUNTEER ADVOCATES					
Total Cases Closed by Volunteers					
TOTAL COST OF HOTLINE					
Total Cost of Hotline	\$117,047		\$185,445	\$184,185	
Average Cost per Case	\$185.79		\$81.87	\$236.44	
Average Cost per Call	\$169.39		\$77.59	\$180.57	

Advocates' Time Spent (Combined Averages)





Productivity Endnotes

Figures in *Italics* for states of HI, MD, WV and WY are estimates based on ratio:
Households = 0.8 Cases; Calls = 1.31 Cases; these ratios are derived from averages calculated from those hotlines which were able to provide data on households, calls, and cases.

All cases closed by hotlines received **AT LEAST LEGAL ADVICE** and/or **INFORMATION**. The case total for "brief services" indicates those cases where the callers additionally received a higher level of service such as a letter or phone call to a third party, legal research, document review, help filling out forms, or negotiation on his behalf. Cases are closed with the highest level of services. In addition to advice, the case totals for referrals indicate those cases where the client was referred for legal representation either to an in-house full service unit or to another free legal program. The hotlines may not close these cases if they are referred in house; if they are referred to another agency; they are usually closed with the advice close code. Hence the breakdown of cases with advice, brief services and referrals does not necessarily equal to total cases closed by the hotline. The collection of this data was an attempt to determine what percentage of hotline callers were receiving more than legal advice and how many clients were being referred for further legal representation.

CA: Other activities include administrative tasks, supervising other staff, interns and volunteers, fund raising, informal training

CT: Other activities include consumer information provided by phone to private and legal services attorneys and aging network providers, and providing guidance and training to support staff

GA: Other activities include collaboration/ planning with State Dept. of Aging

ID: Other activities include substantive law updates, supervision and co-counseling

MD: 6 FTEs are working with seniors 35-40% of their time.

ME: Cases closed - in addition to what is listed above, the Helpline handled 1910 cases in its capacity as a member of Maine's State Health Insurance Counseling Program. Other activities include recruiting, training and supervising senior attorney volunteers



Productivity Endnotes

MI: Other activities include volunteer training and recruitment.

SC: All advice only calls are directed to Ask-a-Lawyer, a service run by the South Carolina Bar. It provides free telephone legal advice to any South Carolina caller; SOS opens case files only for cases needing legal services in addition to advice.

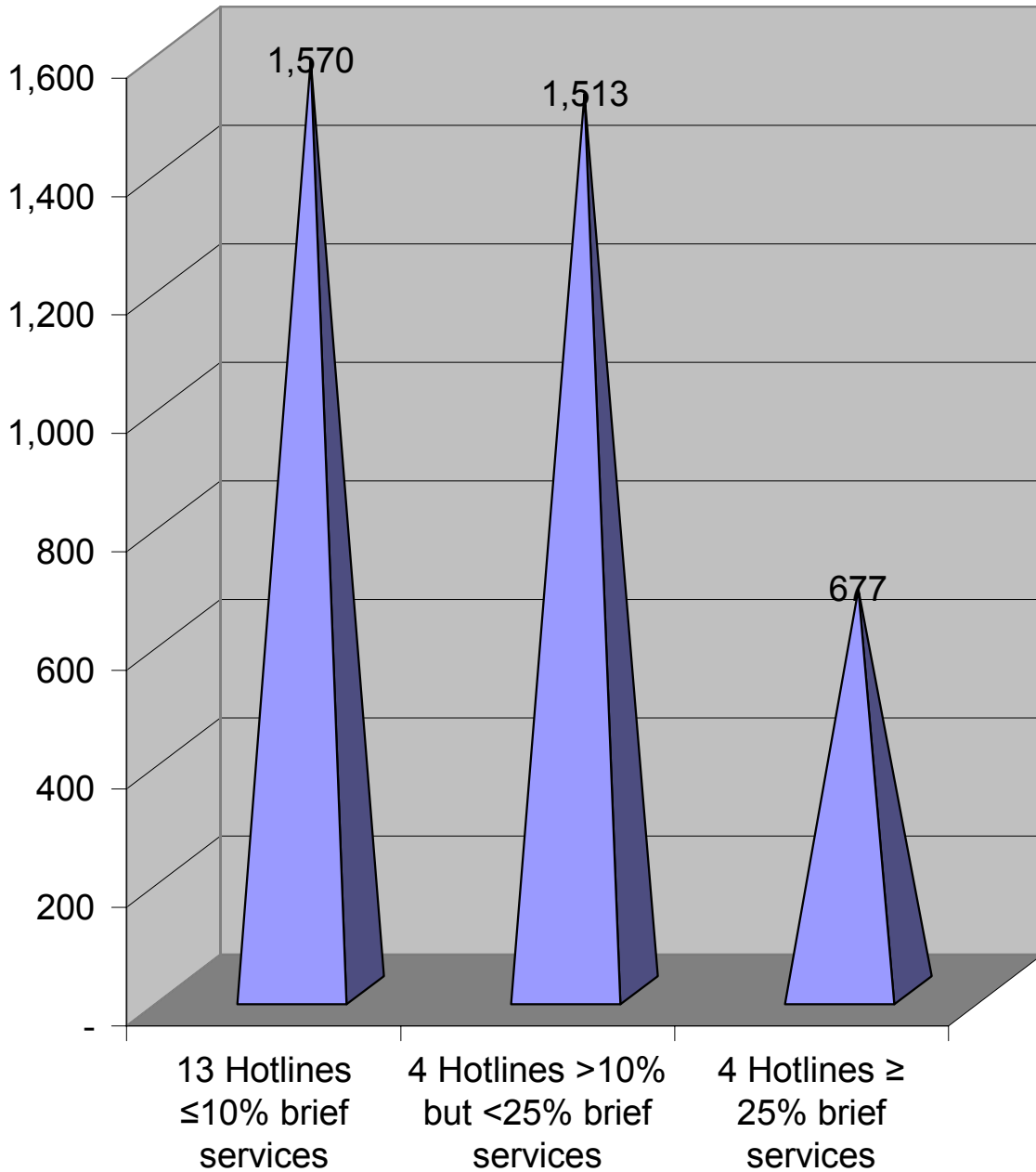
Of the 630 cases opened by SOS, the attorney gives advice to clients and writes advice letters, prepares significant numbers of powers of attorney, health care powers, and helps clients prepare for their bankruptcy, dissolution, public benefit or other matter. However, the documents are executed at the clients' local Center for Equal Justice Office and that office closes the case at that location. Furthermore, since most of the cases opened at SOS are ones where the client needs representation, rather than advice, a large number are referred for extended services to the client's local office after the SOS attorney has assessed the case and provided advice. Those cases are also closed at the local offices rather than at SOS. Therefore, although SOS opened and provided services on 630 cases, most were closed at the client's local office.

SC: Other activities include case time for counsel and advice cases

WV: # Seniors Reached - most of our outreach is to people who serve seniors, rather than to seniors themselves.

**Cases Closed Per FTE Advocate
Comparison by % of Time Spent on Brief Services
(21 Hotlines Reporting)**

**Average Number of Cases Per FTE
Based on % of Time Spent on Brief Services**



**Brief Services
Comparison by Hotlines
(21 Hotlines Reporting)**

FY 2004	Totals	AZ	CA	CT	DC	GA
<i>Total Cases Closed</i>	57,084	2,785	7,387	899	3,121	4,172
<i>Total Cases Closed by Volunteers</i>	3,153		2,467			49
<i>Total Cases Closed by Paid Staff</i>	53,931	2,785	4,920	899	3,121	4,123
<i># FTE Paid Advocates</i>	40.64	1.50	5.00	2.50	1.50	3.44
<i>Total # Cases closed per FTE Paid Staff</i>	1,327	1,857	984	360	2,081	1,199
<i>Avg Brief Services</i>	14.24%	10%	10%	40%	0%	35%
<i>Brief Services – Time Spent 10% or less (13 programs Avg)</i>	1,570	1,857	984		2,081	
<i>Brief Services – Time Spent Between 10% and 25% (4 programs Avg)</i>	1,513					
<i>Brief Services – Time Spent Equal to or More than 25% (4 programs Avg)</i>	677			360		1,199

**Brief Services
Comparison by Hotlines
(21 Hotlines Reporting)**

FY 2004	HI	IA	ID	KY	MD	ME
<i>Total Cases Closed</i>	1,865	3,158	1,780	2,234	2,004	1,973
<i>Total Cases Closed by Volunteers</i>		145				
<i>Total Cases Closed by Paid Staff</i>	1,865	3,013	1,780	2,234	2,004	1,973
<i># FTE Paid Advocates</i>	1.50	1.70	1.50	1.25	2.20	3.00
<i>Total # Cases closed per FTE Paid Staff</i>	1,243	1,772	1,187	1,787	911	658
<i>Avg Brief Services</i>	0%	20%	10%	10%	5%	12%
<i>Brief Services – Time Spent 10% or less (13 programs)</i>	1,865		1,187	1,787	911	
<i>Brief Services – Time Spent Between 10% and 25% (4 programs)</i>		1,772				658
<i>Brief Services – Time Spent Equal to or More than 25% (4 programs)</i>						

**Brief Services
Comparison by Hotlines
(21 Hotlines Reporting)**

FY 2004	MI	ND	NH	NM	OH	PA
<i>Total Cases Closed</i>	5,465	1,633	1,234	7,266	5,613	559
<i>Total Cases Closed by Volunteers</i>	204				285	3
<i>Total Cases Closed by Paid Staff</i>	5,261	1,633	1,234	7,266	5,328	556
<i># FTE Paid Advocates</i>	4.00	1.00	1.20	2.80	1.30	1.00
<i>Total # Cases closed per FTE Paid Staff</i>	1,315	1,633	1,028	2,595	4,098	556
<i>Avg Brief Services</i>	5%	5%	15%	15%	2%	0%
<i>Brief Services – Time Spent 10% or less (13 programs)</i>	1,315	1,633			4,098	556
<i>Brief Services – Time Spent Between 10% and 25% (4 programs)</i>			1,028	2,595		
<i>Brief Services – Time Spent Equal to or More than 25% (4 programs)</i>						

**Brief Services
Comparison by Hotlines
(21 Hotlines Reporting)**

FY 2004	SC	WA	WV	WY
<i>Total Cases Closed</i>	630	2,265	779	262
<i>Total Cases Closed by Volunteers</i>				
<i>Total Cases Closed by Paid Staff</i>	630	2,265	779	262
<i># FTE Paid Advocates</i>	1.00	1.50	1.25	0.50
<i>Total # Cases closed per FTE Paid Staff</i>	630	1,510	623	524
<i>Avg Brief Services</i>	0%	0%	80%	25%
<i>Brief Services – Time Spent 10% or less (13 programs)</i>	630	1,510		
<i>Brief Services – Time Spent Between 10% and 25% (4 programs)</i>				
<i>Brief Services – Time Spent Equal to or More than 25% (4 programs)</i>			623	524

All Case Types

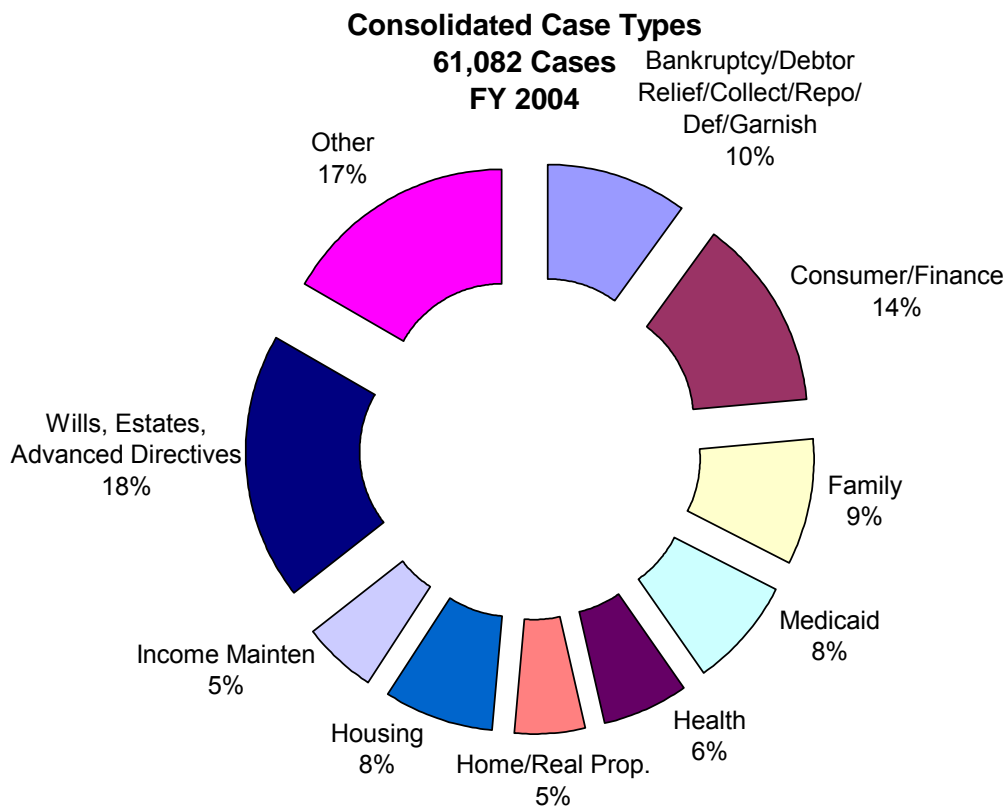
CASETYPES	SUMMARY FOR ALL STATES
Consumer	
1 Bankruptcy/Debtor Relief	1,808
2 Collect/Repo/Def/Garnish	4,261
3 Contracts/Warranties	2,069
4 Credit Access	336
5 Energy not Public Utilities.	10
6 Loans/Installment purchase	292
7 Public Utilities	312
8 Unfair Sales Practice	375
9 Other Consumer/Finance.	4,916
10 Unfair Debt Collection	10
Subtotal Consumer	14,389
Education	
11 Education	14
14 School Enrollment	1
19 Other Education	4
Subtotal Education	19
Employment	
21 Job Discrimination	154
22 Wage Claims	33
23 Employment Benefits/Taxes	3
29 Other Employment & CETA	1,235
Subtotal Employment	1,425
Family	
30 Adoption	37
31 Custody, Visitation	495
32 Divorce/Sep. Annul.	1,139
33 Guardianship/ Conserv.	1,721
34 Name Change	31
35 Parental Rights Termination	5
36 Paternity/Grandparents Rights	128
37 Spouse Abuse	413
38 Support	267
39 Other Family	1,294

Subtotal Family	5,530
Juvenile	
41 Delinquent	1
42 Neglected/Abused/Depend.	47
49 Other Juvenile	6
Subtotal Juvenile	54
Health	
51 Medicaid	4,624
52 Medicare	517
53 Nursing Home Medicaid	935
54 Long Term Health Care (Home, AL)	30
55 Private Health Insurance	52
59 Other Health	2,262
Subtotal Health	8,420
Housing	
61 Fed. Subsidized Housing	567
62 Homeownership/Real Prop.	3,193
63 Landlord/Tenant not Pub. Housing	2,398
64 Other Public Housing	161
65 Project Based Subsidized	11
66 Mobile Home	1
68 Housing Preservation	58
69 Other Housing	1,568
Subtotal Housing	7,957
Income Maintenance	
71 AFDC / Other Welfare	38
72 Black Lung	4
73 Food Stamps/Commodities	84
74 Social Security	770
75 SSI	350
76 Unemployment Compensation	97
77 Veterans Benefits	109
78 Worker's Compensation	409
79 Other Income Maintenance	1,229
Subtotal Income Maintenance	3,090
Individual Rights	

All Case Types

81 Immigration/Natural.	22
82 Mental Health	101
83 Prisoner's Rights	3
84 Physically Disabled Rights (ADA)	142
85 Nursing Home Rights	23
89 Other Individual Rights	757
Subtotal Individual Rights	1,048
Other/Multiple	
91 Incorporation/Diss.	13
92 Indian/Tribal Law/Financial Exploitation	116

93 Licenses (Auto and Other)	192
94 Torts	1,600
95 Wills and Estates	9,112
96 Advance Directives	2,420
97 Other Problems (non-legal)/Insurance	65
98 Criminal Referrals	262
99 Other Miscellaneous	5,370
Subtotal Other/Multiple	19,150
GRAND TOTALS	61,082





Financial Comparisons 2001-2004

FINANCIAL COMPARISONS 2001, 2002, 2003 AND 2004

YEAR	AZ	CA*	CT	GA	HI	IA	ID	KS
01	\$ 95,000	\$336,869		\$152,000	\$46,670	new		\$45,125
02		\$368,325	new	\$271,350	\$46,670	\$188,822	new	\$52,897
03		\$383,025	\$282,302	\$254,160	\$46,670	\$189,967	\$172,350	
04	\$100,000	\$396,654	\$309,679	\$174,669	\$46,670	\$169,108	\$196,073	

YEAR	KY	MD	ME	MI	MS	ND	NH	NM
01	\$100,000	\$165,901	\$269,742	\$266,500			\$166,306	\$233,500
02	\$110,000	\$289,639	\$248,422	\$190,971	\$161,350		\$238,743	\$242,852
03	\$135,000	\$331,984	\$202,080	\$252,501	closed	new	\$235,438	\$265,804
04	\$145,000	\$310,835	\$296,056	\$324,711		\$ 54,600		\$245,980

YEAR	OH	PA	SC	TX	WA	WV	WY
01	\$199,285	\$ 56,513			\$151,000	\$210,000	
02	\$ 53,627		new	\$203,723	\$173,114	\$ 25,000	
03	\$229,572		\$254,064		\$200,000	\$199,000	\$ 42,000
04	\$220,382	\$100,659	\$117,047		\$185,445	\$184,185	

Year	Total Cost	# Hotlines Reporting	Average Cost per Hotline
01	\$2,494,411	15	\$166,294
02	\$2,865,505	16	\$179,094
03	\$3,675,917	17	\$216,230
04	\$3,516,729	18	\$195,374



Costs and Income FY2004

ARIZONA 2004

TOTAL COST\$ 100,000

FUNDING SOURCES

Arizona Supreme Court.....\$ 100,000

CALIFORNIA-2004

TOTAL COST\$ 335,630

FUNDING SOURCES

Administration on Aging Title IV ..\$135,000
AoA Title IIIB funds\$ 52,402
AAA Title IIIIE funds.....\$ 45,939
IOLTA (and other unrestricted sources
through parent agency)\$ 31,983
Other Foundations\$ 33,856
Donations.....\$ 8,314
(SETA) – CSBG funds\$ 15,874
Tobacco litigation settlement funds \$ 9,953
Training fees.....\$ 2,309
In-kind support from LSNC (parent agency)

CONNECTICUT 2004

TOTAL COST\$309,679

FUNDING SOURCES:

Administration on Aging Title IV ..\$125,000
IOLTA\$101,552
The State of CT - Social Services
Block Grant\$ 50,188
United Way.....\$ 27,261
In-kind Support from State Department
on Aging (Mimi Peck-Llewellyn
– Consultant)\$ 5,678

GEORGIA 2004

TOTAL COST\$174,669

FUNDING SOURCES

State Department on Aging.....\$139,669
Atlanta Legal Aid Society.....\$ 35,000
In-kind Support from State Department
on Aging.....

HAWAII 2004

TOTAL COST\$ 46,670

FUNDING SOURCES

Legal Services Corporation.....\$ 46,670

IDAHO 2004

TOTAL COST\$196,073

FUNDING SOURCES

Administration on Aging\$110,000
Legal Services Corporation.....\$86,073

IOWA 2004

TOTAL COST\$169,108

FUNDING SOURCES

Area Agencies on Aging.....\$ 52,121
IO(L)TA.....\$ 12,540
Iowa Executive Council.....\$104,272
Donations\$ 175



Costs and Income FY2004

KENTUCKY 2004

TOTAL COST\$145,000

FUNDING SOURCES

Administration on Aging Title IV ..\$100,000
Association of Older Kentuckians..\$ 15,000
In-kind Support from Access to Justice
Foundation.....\$ 20,000

MARYLAND 2004

TOTAL COST\$310,835

FUNDING SOURCES

Administration on Aging Title IV ..\$127,538
Legal Services Corporation\$ 35,122
Maryland Legal Assistance Network –
matching funds\$ 24,100
Legal Aid Bureau\$124,075

MAINE 2004

TOTAL COST\$296,056

FUNDING SOURCES

Administration on Aging Title IV .\$. \$ 112,501
State Department on Aging\$ 51,493
Area Agency on Aging\$ 22,465
IOLTA\$ 10,316
United Way.....\$ 10,000
Maine Civil Legal Services Fund...\$ 89,281

MICHIGAN 2004

TOTAL COST\$324,711

FUNDING SOURCES

Administration on Aging Title IV
Pension Counseling.....\$150,000
Legal Hotlines.....\$147,711
State Department on Aging.....\$ 15,000
IOLTA.....\$ 50,000
Client Fees or Referral Fees\$ 4,500
Donations\$ 5,500

NEW HAMPSHIRE 2004

TOTAL COST\$360,705

*Includes Senior Citizens Law Project,
Consumer Law Project for Seniors
and Advice Line*

FUNDING SOURCES

Title IIIB Funds.....\$148,631
AoA Title IV\$ 90,000
IOLTA.....\$ 62,074
United Way\$ 60,000

NEW MEXICO 2004

TOTAL COST\$245,980

FUNDING SOURCES

State Department on Aging (Aging and Long
Term Care Department)\$192,180
State Bar of New Mexico:.....\$ 28,100
Donations\$ 700
NM Civil Legal Service
Commission:\$ 25,000



Costs and Income FY2004

NORTH DAKOTA 2004

TOTAL COST\$ 54,600

FUNDING SOURCES

AoA Title IIIB Funds\$ 54,600

OHIO 2004

TOTAL COST\$220,382

FUNDING SOURCES

Area Agency on Aging\$ 67,508

IO(L)TA\$114,945

United Way\$ 37,929

PENNSYLVANIA 2004

TOTAL COST\$100,659

FUNDING SOURCES

IOLTA\$ 15,000

Other Foundations\$ 20,000

Donations\$ 4,659

AARP Foundation\$ 60,000

In-kind Support from
pro bono panel\$ 1,000

SOUTH CAROLINA 2004

TOTAL COST\$117,047

FUNDING SOURCES

Administration on Aging Title IV...\$ 87,786

SC Filing Fee Add-On\$ 29,261

WASHINGTON 2004

TOTAL COST\$185,445

FUNDING SOURCES

Administration on Aging Title IV...\$100,000

In-kind Support from State of
Washington\$ 85,445

WEST VIRGINIA 2004

TOTAL COST\$184,185

FUNDING SOURCES

Administration on Aging Title IIIB \$ 85,604

State Department on Aging.....\$ 18,261

IO(L)TA\$ 16,302

Other Foundations.....\$ 3,200

Donations\$ 8,952

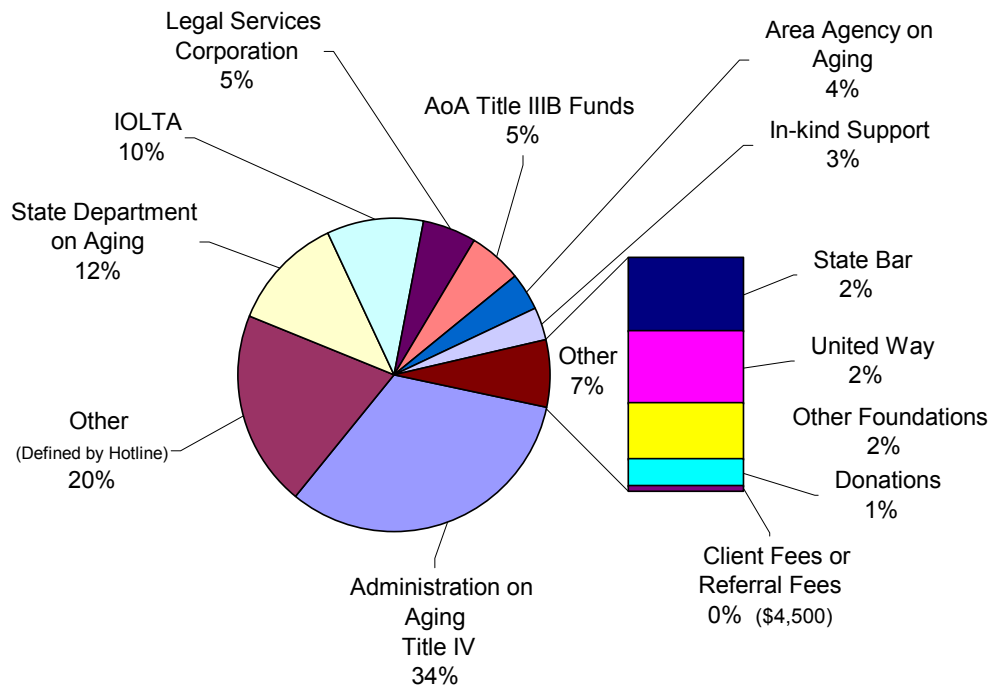
LTC Ombuds, rainy day fund\$ 51,866

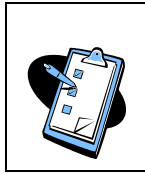
Funding Sources

FUNDING SOURCES

\$3,516,729 TOTAL REPORTED FOR 18 HOTLINES

Administration on Aging Title IV	\$1,147,536
Other	\$712,359
State Department on Aging	\$416,603
IOLTA	\$352,638
Legal Services Corporation	\$192,865
AoA Title IIIB Funds	\$192,606
Area Agency on Aging	\$135,912
In-kind Support	\$122,123
State Bar	\$78,288
United Way	\$75,190
Other Foundations	\$57,809
Donations	\$28,300
Client Fees or Referral Fees	\$4,500





Senior Legal Hotlines Annual Report Significant Events

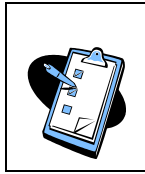
CALIFORNIA – 2004

- A new AOA grant – though smaller than hoped and way under par compared to California’s population – plus some supplementary funding have led to a modest growth in staffing and a significant uptick in cases, including the first meaningful numbers from Southern California, a new territory for us. But even with increased staffing and volunteers, we still fall well short of our potential. The more intensive outreach we are eager to begin would at this stage only further outstrip current capacity, as we are already regularly having to turn some callers away.
- Growth of our program and of that with which we share an agency-owned building are mandating a move to larger office space. It is expected very soon.
- As soon as we move, we will install our new phone system, which should help with efficiency and, therefore, productivity.
- We have met with the directors of most local senior legal services programs in Southern California to discuss coordination of our services once we are ready to jump in fully.
- We held a second training for community interpreters, now available on call to help us advise clients in multiple languages. More fact sheets were translated into 15 new languages.
- We are in the process of planning our campaign for outreach to seniors through religious congregations.
- We have continued to produce new client educational materials and self-help packets, steadily enlarging our supply.
- A new law grad on a one-year fellowship is working on setting up a mediation program as an adjunct service under the hotline’s wing.
- We are eagerly joining with other senior legal hotlines in our new national association to work toward adequate and consistent funding for programs in all states.
- We continue to work toward obtaining state support for the hotline and local senior legal services programs.

CONNECTICUT - 2004

Please note that in order to provide to CLPE’s clients our intended mix of advice and extended services—currently over 40% of our calls require extended services—we have had to spend more time per average call than the 30 minutes we originally projected. The following is a summary of significant events.

- Responding to feedback from our callers and partners, starting in April we expanded our telephone hotline hours from three hours per day, three days per week, to eight hours per day, five days per week. Since then, the volume of our caseload has increased from a rate of 800 per year to over 1,300 per year.
- Expanding the hotline’s hours required updating and re-distributing all of our CLPE materials, including brochures, posters, business cards, fact sheets, and referral protocols.
- We informed all of our partners of the new hours and reviewed for them our case referral protocols.



Senior Legal Hotlines Annual Report Significant Events

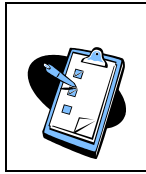
- Now that the CLPE's basic operating infrastructure is in place, we are spending much less time on program design and implementation issues and more on targeted service. This has led to, among other things, an increase in the frequency of extended services cases (cases that involve more than advice and mailing follow-up materials): for example, cases that involve review and analysis of documents, legal research, letters to debt collectors to persuade them to stop their dunning activities, and negotiations seeking settlements of disputes. As proposed in our original grant, as a source of future funding for the CLPE, our attorneys are also now able to begin to litigate consumer cases.

DISTRICT OF COLUMBIA - 2004

- Hotline attorneys are now available when intake personnel are short-staffed or overburdened, to perform telephone intake. This is accomplished through a modification of the telephone system which allows engaging of a button sending calls directly to the hotline attorney.
- The new intake system and recent modifications have resulted in 97% of callers being called back within 24 hours of intake.
- Newly designed hotline flyers are now being distributed throughout D.C. at senior events and senior service centers.
- Intake hours have been extended to all open office hours. Where hotline attorneys are not present, since hotline hours are from 9:30 to 3:30, callers are advised when they can expect a return call. Intake remains open on days when no hotline attorneys are present as a result of training, meetings, vacation or illness, and callers are similarly advised when to expect a return call. The rationale is to perform intake when the caller is available and not assume they will call back at a future time. The contract attorney is available to perform services where hotline attorneys will not be available for more than a day or so.

GEORGIA – 2004

- Ellie Crosby, founder and first managing attorney, resigned from the Georgia Senior Legal Hotline and is now a consultant with AARP Foundation Technical Support for Legal Hotlines and The Center for Social Gerontology. Cheri Tipton joined the group as Manager in March 2004.
- Georgia eliminated the Adult Medically Needy category of Medicaid, terminating some 1700 nursing home residents from the program. To address the crisis, the Hotline served as the clearing house for advice and Qualified Income Trust referrals, teaming with the State Long-Term Care Ombudsman, the Elderly Legal Services Providers, as well as private attorneys volunteering their time. To date, of the initial 1700 residents, no nursing home resident has received a Notice of Involuntary Discharge from a nursing facility.



Senior Legal Hotlines Annual Report Significant Events

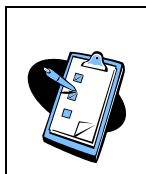
HAWAII - 2004

- Having completed our three year funding from AOA in 2003, the Senior Legal Hotline was only able to help those seniors who qualified under LSC income eligibility guidelines or could be helped under another funding source such as Title III (on Maui and the Big Island) or HUD housing grants (statewide).
- Under the last AOA grant, we were able to help seniors, regardless of income, with counsel and advice and brief services. The Legal Aid Society of Hawaii is one of the few free legal service providers to have separate intake and brief services staffing. In August, 2004, Rob Palin, the managing attorney for the Hotline was promoted to also manage the brief services staff. We hope through this integration to increase the efficiency of the delivery of brief services.
- We continued our outreach efforts, sending a representative from the Legal Aid Society of Hawaii to every fair, exposition, and speaking engagement to which we were invited. Our 21% increase in the number of senior cases opened is directly attributable to this effort. We continue to look for some permanent funding source for our Senior Legal Hotline.

IDAHO - 2004

Senior Legal Hotline numbers have steadily increased during 2004. Steps have been taken to streamline the operation of the advice line to better serve our clients. They include:

- The adoption of instant messaging between screening staff and the advice line attorney. Instant messaging saves both staff and attorney time.
- Many legal problems on the Advice Line are encountered almost daily. For example, many clients call regarding problems they are having with creditors. We have responded by drafting “canned notes” which are saved in the Kemp’s Prime case intake software and can be pasted into case notes with a click of a button. This saves unnecessary typing and ensures the consistency of advice. Canned notes have been created for wills, powers of attorney, living wills, divorce, Medicaid, and many other substantive areas.
- We now pre-assemble selected packets for frequently encountered legal issues. For example, we have prepared in advance collection defense packets and durable power of attorney for health care/living will packets. This saves the advice line attorney time in providing these materials to clients.
- We no longer print out each complete intake for the hotline managing attorney’s review. Instead, the advice line attorney continues to complete a closure sheet which is then placed into the managing attorney’s in-box. He then uses the closure sheet to locate the intake on his computer and reviews each intake for quality control purposes. This avoids the unnecessary printing of each case which requires 3 pages per case. Averaging 8 new cases a day per attorney, this saves the program 24 sheets a day, 120 sheets a week. This practice also saves wear and tear on the office printers.
- We no longer fax new cases to the local service offices. Instead, we have asked each service office to make a daily report of the senior line intakes from their service area and review them electronically. This saves advice line attorney time, eliminates many long distance fax charges, saves on paper costs, and wear and tear on printers and faxes.



Senior Legal Hotlines Annual Report Significant Events

- As additional legal problems are presented to us, we have expanded our legal knowledge and added to the Senior Hotline Library. This includes the addition of various pamphlets, form letters and other materials that are routinely provided to clients.

IOWA – 2004

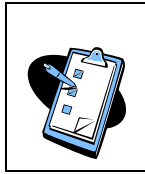
- Since we no longer have an AoA grant, we were able to increase funding from area agencies on aging. We remain short of funding and staff has been reduced. Cases closed for the next fiscal year will probably amount to fewer than 2,500.

KENTUCKY - 2004

- Rita Caufield left us a managing attorney early in 2004 to study Spanish and do volunteer work. State matching funds are critical to paying the entire cost of the second full time attorney position. Our state funding has been uncertain throughout the year. The state continues to operate without a budget. At this time we expect a significant cut in our state funding. As soon as the funding issue is resolved, or other funding is secured, additional staffing will be addressed. David Godfrey has assumed the role of managing attorney for the Legal HelpLine. David has worked on the HelpLine since the first year of operation.
- Despite these issues, the HelpLine continued to grow and served more clients this year than ever before. The HelpLine is seen as a community leader and expert in areas impacting our aging population.
- There was some good news on funding late in the year. The HelpLine has been awarded a subcontract through Ogilvy for CMS funds to conduct outreach and enrollment activities on prescription drug access. Additional funding is expected from the Bluegrass Area Development District and a private foundation to fund general activities of the HelpLine and programs to promote access to prescription drugs.

MARYLAND – 2004

- Integrated central intake system toll-free number pilot – The telephone component of the statewide centralized intake system was activated.
- People’s Law Library (PLL) focus groups reveal surprising interest and access to the web by low-income persons.
- MLAN surveyed the community legal services agencies and libraries on their use of the PLL website on behalf of the public, including seniors.
- PLL materials on public benefits, prescription drugs, and Medicare were updated.
- MLAN puts diagnostic substantive law materials for advocates on-line.
- Held Fall 2003 “Know Your Rights” Workshop and Presentation with the Asian Pacific American Legal Resource Center (APALRC) for nearly 50 Chinese Seniors.

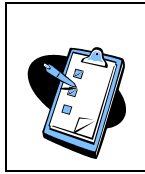


Senior Legal Hotlines Annual Report Significant Events

- Held Spring 2004 “Know Your Rights” Workshop and Presentation with APALRC for nearly 40 Korean Seniors.
- With assistance from LAB and MLAN, APALRC trained more than 40 Law Student Volunteers in January 2004 to Staff the Legal Helpline at APALRC.
- In February 2004, APALRC trained a class of 40 community members in legal interpretation, of which 13 were selected to become APALRC legal interpreters.
- APALRC continued its outreach by identifying and developing relationships with key community-based organizations in Maryland such as the Korean Community Service Center (KCSC), Maryland Vietnamese Mutual Association, and Boat People SOS.
- Updated the English and Korean versions of the joint LAB – APALRC brochure, “Asian American Senior Citizens’ Outreach Project”. Other translations of the brochure are in progress.
- Developed a handout entitled “Public Benefits for Seniors in Maryland” and worked with APALRC to translate it into Korean and Chinese.
- APALRC staff and volunteers participated in the Asian American and Pacific Islander Community Day on November 6, 2003.
- Integrated central intake system pilot – The first external partner agency, the Women’s Law Center (WLC), was integrated into the joint telephone and database system. This will allow seniors to have expanded assistance in family law matters, as calls in this area will be more widely distributed between the Helpline and volunteer attorneys working on WLC’s Family Law Hotline.
- People’s Law Library (PLL) Updates – We updated key areas of the public access website for the state with changes important to seniors in the Social Security and Medicare programs.
- People’s Law Library (PLL) Expansion – We received funding to expand the PLL website in two key areas of interest to seniors – kinship care and multilingual materials (an update and expansion of the PLL Multilingual Gateway).
- Senior Helpline Identity Theft Presentation at Baltimore City’s Law Day for Seniors on April 24, 2004 - We presented four workshops to more than 300 attendees.

MAINE - 2004

- Partnered with local Area Agency on Aging and Title III B staff to form an elder abuse task force in central Maine.
- The Helpline Managing Attorney spoke at a statewide conference on elder abuse sponsored by the Maine Office of Attorney General.
- Established “legal information kiosks” at twenty-seven community health center branch locations in Maine. The LAP also coordinated several legal clinics at community health centers. Clinic services included executing advanced directives, financial powers of attorney, and obtaining information and referrals.
- The Legal Access Project Director recruited and trained five senior attorney volunteers to staff legal clinics.



Senior Legal Hotlines Annual Report Significant Events

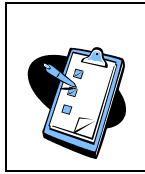
- Distributed over 50,000 Know Your Rights brochures and more than 3,000 Legal Health Check-Up forms.
- Developed a new Helpline “marketing card,” a 6x9 informational card about the Helpline that will be distributed to Area Agencies on Aging, community health centers, Resident Service Coordinators, courts, and other service providers.

MICHIGAN - 2004

- There were no major staffing changes during this fiscal year. However, we were able to recruit several new lawyers to volunteer with us. They receive invaluable training from our seasoned attorneys and we are able to provide service to more seniors. We have continued to expand our brief services utilizing the law student volunteers.
- One shift in our focus over this past year has been to get everyone involved in the fund development area. We are calling upon the hotline advocates to provide us with stories that reflect the great work that they do. With the increasing demands on our budgets, we have decided to step up our efforts to inform the public and funders of the services that we provide.
- A trend that we have noticed in recent years is the growing number of caregivers that are calling on behalf of seniors. While we have an established protocol for getting third-party permission, there are instances where the willing caregiver has a legal issue as a result of undertaking this burden. We are working to secure additional funding to support these needy clients.

NEW HAMPSHIRE - 2004

- The good news was that at the end of September 2003, we received a \$90,000 per year grant from the Administration of Aging to start up a Consumer Law Project for Seniors (CLPS). As a result, CLPS staff handles all consumer-related calls. Within its grant obligations to do outreach, CLPS educates seniors and service providers about the Advice Line.
- In September 2004 we received a \$40,000 grant for the Access to Benefits Coalition to help increase enrollment of low-income Medicare beneficiaries for the Medicare transitional assistance benefit. Part of our obligation under the grant is to screen all clients for potential eligibility for transitional assistance. We are sharing the funding with our state’s SHIP.
- Unfortunately, due to lack of funding for the Advice Line, this year we had to significantly decrease the level of services we provide for other types of calls. We no longer offer telephone advice for wills or other estate planning issues and instead send clients written information and offer to screen them for pro bono eligibility, if appropriate. We also funnel all housing and benefits intakes to non-Advice Line staff. However, our agency remains committed to continuing the Advice Line, even on a limited basis. With additional funding, we would increase staffing and types of calls handled.



Senior Legal Hotlines Annual Report Significant Events

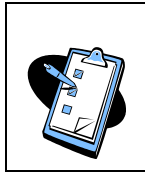
NEW MEXICO - 2004

In 2004 LREP has seen many changes.

- Richard Spinello, Managing Staff Attorney, left the program to become the Director of the Public and Legal Services Department of the State Bar of New Mexico. Amanda Hartmann, staff attorney, stepped into the Managing Staff Attorney position.
- LREP received a grant from the Legal Services Commission to update the 1989 Senior Legal Handbook. LREP hopes that the Handbook will be one of the most comprehensive legal handbooks for seniors in the country.
- In January 2004, LREP hired attorney Wendy Basgall part time hotline attorney and to begin drafting the updated Senior Handbook.
- The Legal Services Commission has funded LREP's Contract attorney outreach program for another year. The contract attorneys have had a very large, positive impact on the more rural areas of the state. One county had a 136% increase in the number of seniors reached.
- Overall numbers were higher for LREP this year, following a general trend.
- LREP has seen an increase in Bankruptcy issues for seniors, especially in light of more creditors pursuing legal action against seniors who are judgment proof.
- LREP and the Public and Legal Services Department of the State Bar of New Mexico have combined forces to implement a single intake telephone system that has been designed to capture more senior phone calls to the State Bar and ensure that they are routed to LREP. Since this system has only been in place for a few months, it is too early to tell if it is having the desired effect.

OHIO - 2004

- The Ohio Senior Hotline now has 6 paid part-time attorney staff, 2 volunteer part-time attorney staff and 2 part-time paid Ohio Pension Rights Project staff and a Managing Attorney.
- The Ohio Senior Hotline continues its Ohio Pension Rights Project as a sub-grantee of the Legal Hotline for Michigan Seniors' Michigan Pension Rights Project. The project has an advertising budget which allows the project to place newspaper ads throughout Ohio which also benefits the Ohio Senior Hotline.
- In addition to the Ohio Senior Hotline's web presence at www.proseniors.org, which also houses our web pamphlets on various elder-law topics, in FY 2004 the Ohio Senior Hotline created an Intranet site which has two major components: a **Hotline Referral Rolodex**, which has a page for each letter of the alphabet and lists names, phone numbers and links to internet sites of agencies and places to refer clients and a **Digital Legal Library** which gathers, under subject matter headings, research memos, changes in the law, links to forms and internet sites and other information useful to hotline attorneys.



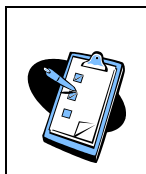
Senior Legal Hotlines Annual Report Significant Events

PENNSYLVANIA - 2004

- With AARP funding, SeniorLAW Center has established and advertised the Pennsylvania Senior Law Telephone Helpline (hereafter “the Helpline”), and provided Helpline services to well over two-thirds of the 67 counties in Pennsylvania. During this first year of the Pennsylvania Senior Law Helpline, the following activities ensued, based on the categories requested:
- **Changes:** From January through February 2004, the Helpline was operational for 3 hours a day, 3 days a week. In March, the Helpline increased its service to the public to 5 days a week, from 10:00 a.m. – 1:00 p.m.
- **Trends:** Within the 10 months of operation for this new program, we would hesitate to identify anything as a “trend” yet. However, it is interesting to note that the large number of anticipated calls regarding the new Federal Drug Card program for seniors did not materialize. It may well be that individuals, no doubt correctly in many cases, did not identify as “legal” in nature, the questions they had regarding the program.
- One trend we do hope to see is more and more seniors on email. This is a demographic question we ask at the end of the telephone call: “do you have access to a computer” and “do you have email.” In several cases we have been able to send a useful web site to the caller, on the topic about which s/he had questions. This is always in addition to the legal advice we give over the telephone.
- **Projects accomplished:** Since this is our first year of operation, our main project has been setting up the Helpline, advertising our services, refining our information gathering, and developing and refining resources. Resources developed by the Helpline include various legal, aging, pro bono, and social services manuals and directories from across Pennsylvania, legal subject files with information obtained from various sources, and a computerized subject directory connecting to relevant web sites and web sources.
- **Extended Service:** Under 10% of the calls we handle involve anything more than giving legal advice on the telephone; making referrals when appropriate; researching a subject before giving advice, when necessary; and occasionally sending useful websites to callers who have email access. We do not, as a practice, review documents, and we do not negotiate for our callers.

SOUTH CAROLINA – 2004

- The Serve our Seniors (SOS) hotline answered 1,148 calls from seniors this reporting period compared to 439 calls answered in grant year 1. This represents a 262% increase in senior telephone calls;
- The SOS Attorney provided 74 seniors with counsel and advice during this reporting period compared to 47 cases closed in grant year 1. This represents a 57% increase in SOS cases’
- The SOS Hotline referred 556 intakes to the local legal services’ Centers for possible extended representation compared to the previous year’s 349 intakes. This reflects a 59% increase in senior referrals to the local legal services’ Centers;

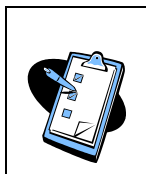


Senior Legal Hotlines Annual Report Significant Events

- Over 6,000 SOS brochures, detailing the operation of the hotline, were distributed to partnering agencies and senior nutrition sites;
- 50 SOS Hotline clinics were conducted in 48 different partnering sites throughout the State of South Carolina. The clinics provided information about the SOS Hotline and the type of cases which would be referred to legal services;
- 1,233 seniors throughout South Carolina attended one of the SOS Hotline clinics. This represents an increase over the first year of the SOS grant of approximately 65% more seniors served at clinics;
- Due to current budget restraints and staff leaving, the SOS currently has 2 part-time intake workers compared to the 4 part-time intake workers allowed by the current SOS grant;
- The SOS Hotline was spotted on WLTX television on May 13, 2004;
- The SOS Hotline extended the hours of operation to 9:00 a.m. to 4:30 p.m. Monday thru Thursday;
- The “South Carolina Elder Resource Guide” was published with the help of the Administration on Aging, the South Carolina Appleseed Legal Justice Center, and the South Carolina Centers for Equal Justice. Approximately 500 of “The South Carolina Elder Resource Guide” were distributed to partnering agencies, the Elder Law Bar Committee of the South Carolina Bar, and SCCEJ to assist seniors in finding other helpful resources;
- The SOS staff joined forces with the Elder Law Bar Committee of the South Carolina Bar in assisting senior citizens. This collaborative affords the hotline staff the opportunity for much needed training in the area of elder law. The SOS staff involvement also has provided the Elder Law Bar Committee members with an understanding of legal services and poverty law issues affecting the senior citizens of the State of South Carolina;
- The SOS staff is tackling the problem of not getting responses to their SOS evaluation surveys by addressing client satisfaction at future SOS outreach/education clinics.

WASHINGTON - 2004

- Our work during this preliminary period, the first year of work under the Northwest Justice Project’s current grant, involved carefully reviewing client records, contacting and surveying clients from the previous 12 months, formulating a functional capacity tool to detect access barriers, and following up with present advice and brief service clients. CLEAR*Sr staff also conducted client outcome surveys, created tracking systems to gauge our success in determining outcomes and results, and met regularly to refine the systems we are putting into place. We also conducted outreach efforts with senior service providers by sending out our semi-annual newsletter and sending out invitations to partner agencies to join our Community Advisory Committee. Finally, CLEAR*Sr attorneys worked on increasing brief services, especially within our targeted areas.
- Due to a reconfiguration of the legal services delivery system in Washington State, the Northwest Justice Project became responsible for providing legal services to seniors under contracts with seven regional Area Agencies of Aging. NJP will fulfill those contracts with a combination of CLEAR*Sr and field office services. As a result of the increased funding for services for seniors, NJP added an additional full-time attorney to CLEAR*Sr.



Senior Legal Hotlines Annual Report Significant Events

- Staff Changes: Northwest Justice Project is pleased to introduce two new CLEAR*Sr advocates – Joanna Otero and Catherine West! Joanna Otero recently returned to CLEAR after a four year absence. Joanna is bi-lingual (Spanish and English) and brings back to the program her original commitment and enthusiasm for client service. She also brings her more recent experience in estate planning from her private practice.
- NJP welcomes Catherine West, the newest addition to the CLEAR*Sr program. Catherine graduated from the University of Wisconsin Law School in May, 2004, and brings to the program a strong background and dedication to elder and poverty law issues.
- Jim Kerney, a dedicated CLEAR*Sr attorney for more than six years, left CLEAR*Sr in July, 2004. We were sad to see Jim go but wish him the best of luck in his new home in La Crosse, Wisconsin. Jim's wife Katherine is said to have found her dream job there and Jim will be starting his own private practice in the near future.

WEST VIRGINIA - 2004

- Personnel: Our staff attorney Alison Cox left us to move with her husband to North Carolina, and we hired a new staff attorney Jeannie Underwood in July 2004. We also lost a great law student Steve Sisneros who we'd had working part-time for 3 years. Steve graduated and moved to Arizona. We hired two work-study students, one law student Terrilyn Cheatham, and one undergrad Great Sullivan. Our intake worker and one of our Board members each had very serious health problems this year, which required them to be in treatment for several months. Both are thankfully returning to good health now.
- Fiscal: We spent over \$22,000 of our rainy day fund in FY04, and all things remaining the same, and we have enough left, all else remaining stable, to continue at the same levels for 3 more years. We are trying to find renewable sources of funding for at least \$50,000 more per year.
- Outreach: We are continuing to make slow progress toward distributing our services more appropriately throughout the state, especially getting more clients from the very rural coal fields. We served clients in 54 of the 55 counties this year. To respond to our tighter financial situation, this year we requested that anyone requesting a training or presentation from us pay our travel expenses for the training. It worked well; we brought in about \$3500 in travel reimbursement and honoraria.
- Technology: We moved most of our internal administrative forms and databases to our intranet this year, and a great deal of substantive information for advocates, too. This is progress toward the goal we've had for several years of being able to operate smoothly when some or all of us are outside the office (i.e. at home, out of town). For about 4 years we have been able to still operate the hotline during snowstorms when none of us can get to the office, and this year's improvements to that system were substantial.

WYOMING - 2004

- We are developing an elder law section on our LSC website.
- We have developed a new reporting form for Wyoming's Aging Division.
- We accomplished more statewide outreach this year.