

SENIOR LEGAL HOTLINES

ANNUAL REPORT 2006

OCTOBER 1, 2005 - SEPTEMBER 30, 2006



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

and



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Contents

Contents	<i>ii</i>
Summary	1
Number of Hotlines 1985-2006	4
Statewide Legal Hotlines Households, Calls, Cases Bar Chart	5
12 month Productivity	6
Chart: Comparison of Number of Cases Closed 2004 and 2005	9
Chart: Cases by Service Given	9
Productivity Endnotes	10
Financial Comparisons (2001 – 2006)	12
Costs and Income	13
Funding Sources Table	18
Significant Events	19



Summary

In 2006, statewide legal hotlines for seniors were operating in some form in twenty-six states, Puerto Rico and the District of Columbia. These include present and former AoA Title IV grantees as well as the four existing hotlines (IA, ID, MD, and ND) in states which were recipients of 2006 AoA Title IV “Model Approaches to Statewide Legal Assistance Systems” cooperative agreements. The Elder Law Helpline at Legal Services of Alabama, the AL legal provider partner for the Model Approaches project began taking calls in February 2007. For this report, twenty-one of the statewide senior legal hotlines provided productivity data to the AARP Foundation Technical Assistance Project. The Project gratefully acknowledges the important and generous contribution of the hotlines who submitted their data for this Report:

The objectives of this effort are:

- To create benchmarks for planning and self-evaluation and
- To disseminate data on the productivity and cost efficiency of the delivery models.

The data published in this report is intended to help planners determine how much money to allocate to running the hotline and how many cases they can expect to handle with the resources allotted. Existing legal helplines are able to use the data to compare productivity and cost to other hotlines doing similar work.

DATA SUMMARY 21 Hotlines Reporting HOTLINE PRODUCTIVITY

Total Cases Closed 2006: 59,910

Total Calls Handled 2006: 96,640

Average Number of Cases per FTE 2006: 1,238

The number of reported cases closed decreased slightly from 2005, from 64,176 cases in 2005 to 59,910 in 2006. However, the number of calls handled remained constant, with 96,005 calls reported in 2005 and 96,602 in 2006. This variation can be attributed to the overall trend of providing a greater number of brief services for clients. As a result of time spent on additional services for a greater percentage of hotline clients, fewer cases were closed with existing funds and staff; however, the number of calls did not decrease since additional attorney/client phone consultations per case may be needed in providing the brief service.

Level of Service

The percentage of cases where the legal hotline provided a higher level of service than telephone advice has continued to increase from **11%** in 2004 to **17%** 2005 to **23%** in 2006..

Of the total **59,910** cases closed by the hotline:

- **40,583 (68%** of total) were closed with telephone information or advice;
- **13,664 (23%** of total) were closed with a brief service (letter, phone call to a third party, legal research, review of documents, help filling out forms);
- **12,129 (20%)** were referred for extended assistance either to in-house full service units or to other free legal services programs.

Generally, hotlines reported cases closed either with the **ADVICE** close code or with the **BRIEF SERVICE** close code which includes those cases which were closed with brief service or higher level of service such as negotiation or other service. Cases that were referred for free legal representation still receive advice at the hotline level and are usually closed with that code at most of the hotlines. However, a few of the hotlines close cases sent for free extended legal services with the **REFERRAL** close code.

The increase in brief services has also impacted the average number of cases a full-time hotline advocate handles per year;

Average number of cases per FTE in 2006 was **1,319** compared with 1,519 in 2005.

Outreach:

Fourteen senior legal hotlines reported that they reached a total of **44,556** seniors through outreach efforts, similar to last year's estimate of 43,605. Most of the hotlines reported reaching seniors through topical presentations or counseling at fairs and other outreach events. However, a couple of hotlines included seniors reached through mass mailings, distribution of materials with Meals on Wheels, and publications distributed to legislators.

Cost Efficiency

It is evident that as hotlines make the decision to devote more resources to providing services beyond telephone advice, the average cost of handling a case will increase. However, the productivity and cost efficiency of the helpline model remains outstanding.

The increase in brief services provided naturally increased slightly the cost per case/call.

Nineteen of the hotlines provided the costs of operating the service:

- Average annual cost of operation for a statewide senior legal hotline was **\$249,100** with a range of **\$11,405 (KS) - \$774,864 (TX)**. As would be expected, helplines in states with large populations and those doing a large number of brief services had higher costs. The low cost of the Kansas Elder Law Hotline is attributable to its system of referring most calls to pro bono attorneys.
- Average cost per case was \$79.00 in 2006 compared with \$72.43 in 2005;
- Range of cost per case was \$13.20 - \$332.00
- Range of cost per call as \$11.36 - \$230.

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 or extended services and other activities which lower the number of cases a hotline is able to handle.

Funding Sources

Major funding sources for the operation of the statewide hotlines include:

- AoA Title IV (17%);
- IOLTA..... (12%);
- Other..... (12%);
- Foundations..... (11%);
- State Department on Aging..... (9%);

- In Kind Support from various sources . (9%);
- AoA Title IIIB..... (8%);
- Legal Services Corporation..... (4%)

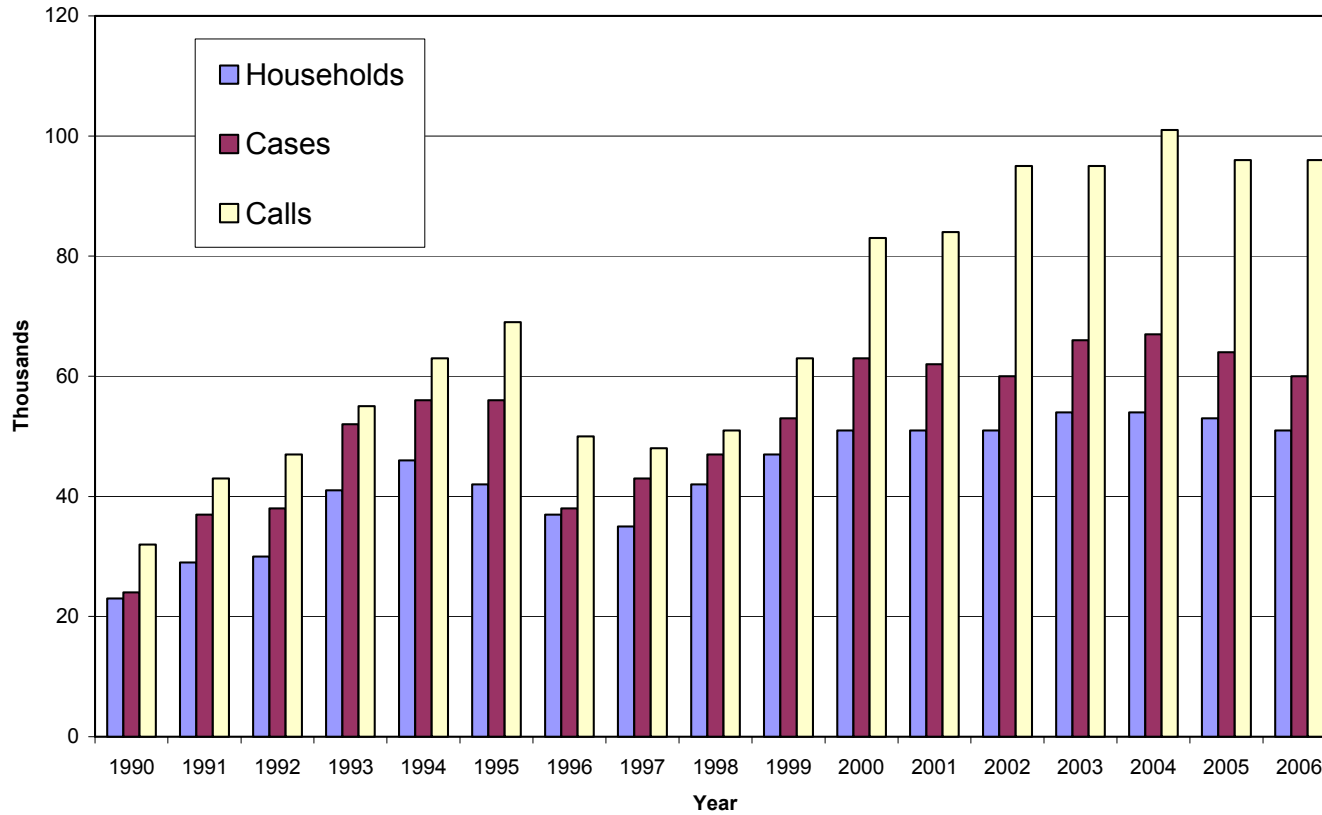
AARP Foundation continues to provide technical assistance to legal hotlines with a grant from the Administration on Aging. The Project publishes the *Legal Hotline Quarterly* and produces and collects hotline related documents for posting at the Legal Hotline Support Library. The searchable Legal Hotline Directory and all legal hotline documents can be found at www.legalhotlines.org.

The Project Director is a member of the workshop planning team for the ABA/NLADA Equal Justice Conference and produced the first Legal Hotline Pre Conference day, as well as the annual track of hotline-legal services innovations workshops, for the conference held in March 2007.

The Project also manages two interactive Technical Support email groups at legalhotlines@lists.povertylaw.org and seniorhotlines@lists.povertylaw.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

Growth by Year
1990-2006



Productivity (21 Hotlines)

12 Month Productivity, part 1								
				see notes below				
FY 2006	Totals		AZ	CA	CT	DC	GA	HI
HOUSEHOLDS, CASES, CALLS								
Total Households Served	51,367	total	2,714	8,275	1,160	2,762	2,832	1,775
Total Cases Closed	59,910	total	3,156	10,056	1,402	2,403	3,682	2,064
Total Cases Closed with Advice or Info	40,583	68% of cases	2,071 (66%)	9,076 (90%)	600 (43%)	683 (28%)	2,521 (68%)	962 (47%)
Total Cases Closed with Brief Services or higher	13,698	23%	1,025 (33%)	980 (10%)	781 (56%)	1,250 (52%)	1,029 (28%)	1,102 (53%)
Total Cases Closed by Full Service Unit	4,779	8%	<i>Most of the hotlines do not do intake for an in house statewide full service unit;</i>					
Total of Cases Referred to free legal services	7,350	12%			21 (1%)	216 (9%)		
# cases receiving follow- up materials	18,074	30%		5,004 (50%)	135 (10%)	61 (3%)		
Total Calls Handled	96,640	total	5,081	21,419	1,263	3,114	13,730	4,000
OUTREACH	Approximate Number of Seniors Reached through workshops, outreach activities and presentations							
# Seniors Reached	44,556	est.			4,623		137	2,200
ADVOCATES								
# FTE Paid Advocates	45.02 (tot)	2.14 (avg)	0.7	7	2.5	1.3	1	1
Total Cases Closed by Volunteers (7 hotlines)	4,157 (tot)	594 (avg)		2,629			106	
Total # Cases per Paid FTE	55,753 (tot)	1,238 (avg)	4,509	1,061	561	1,848	3,576	2,064
Total Cost of Hotlines	\$4,732,850 (all)	\$249,100 (avg)	\$95,000	\$556,980	\$426,617		\$233,096	\$46,670
Average Cost per Case	\$79.00	avg	\$30.10	\$55.39	\$304.29		\$63.31	\$22.61
Average Cost per Call	\$48.97	avg	\$18.58	\$26.00	\$337.78		\$16.98	\$11.67

Productivity (21 Hotlines)

<i>12 Month Productivity, part 2</i>								
FY 2006	IA	ID	KS	KY	MD	ME	MI	ND
HOUSEHOLDS, CASES, CALLS								
Total Households Served	2,166	874	949	2,031	3,368	1,839	4,832	1,914
Total Cases Closed	2,380	876	864	2,362	3,916	2,209	6,349	1,867
Total Cases Closed with Advice or Info	2,007 (84%)	719 (82%)	829 (96%)	1,569 (66%)	960 (25%)	1,483 (67%)	4,748 (75%)	783 (42%)
Total Cases Closed with Brief Services or higher	373 (16%)	127 (14%)	34 (4%)	793 (36%)	337 (9%)	511 (23%)	1,601 (25%)	1,084 (58%)
Total Cases Closed by Full Service Unit	122 (5%)	161 (18%)	295 (34%)		387 (10%)			
Total of Cases Referred to free legal services	128 (5%)				2,842 (73%)	215 (10%)	312 (5%)	176 (9%)
# cases receiving follow-up materials	568 (24%)		772 (89%)		192 (5%)		6,060 (95%)	1,867 (100%)
Total Calls Handled	2,406	874	1,004	3,495	3,918	4,418	7,936	2,124
OUTREACH	Approximate # of Seniors Reached through workshops, outreach activities and presentations							
# Seniors Reached	732	150	606	2,852	24,138		5,000	1,175
ADVOCATES								
# FTE Paid Advocates	1.9	0.5	0.27	2.25	1.5	2.75	3.5	1
Total Cases Closed by Volunteers	220		646		0	0	53	0
Total # Cases per Paid FTE	1,137	1,752	807	1,050	2,611	803	1,799	1,867
TOTAL COST								
Total Cost of Hotline	\$190,410	\$42,000	\$11,405		\$291,906	\$157,715	\$360,900	\$57,800
Average Cost per Case	\$80.00	\$47.95	\$13.20		\$74.54	\$71.40	\$56.84	\$30.96
Average Cost per Call	\$79.14	\$48.05	\$11.36		\$74.50	\$35.70	\$45.48	\$27.21

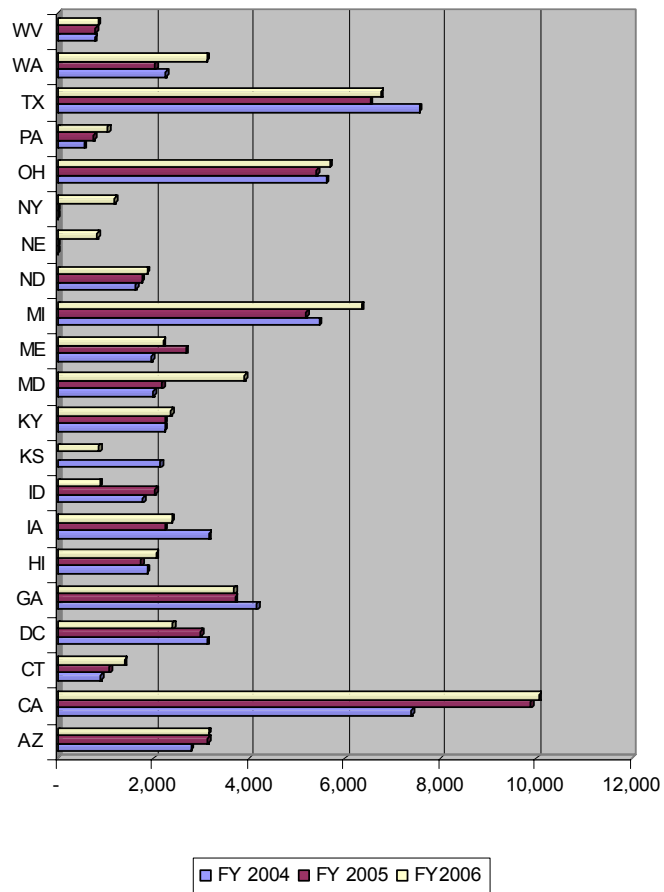
Productivity (21 Hotlines)

12 Month Productivity, part 3							
FY 2006	NE	NY	OH	PA	TX	WA	WV
HOUSEHOLDS, CASES, CALLS							
Total Households Served	780	1,557	4,868	900	4,304	3,288	893
Total Cases Closed	836	1,192	5,681	1,055	6,758	3,115	843
Total Cases Closed with Advice or Info	598 (72%)	879 (74%)	4,398 (77%)	1,000 (95%)	4,686 (69%)	1,830 (59%)	252 (30%)
Total Cases Closed with Brief Services or higher	181 (22%)	290 (24%)	1,283 (23%)	89 (10%)	559 (8%)	989 (32%)	305 (36%)
Total Cases Closed by Full Service Unit	49 (6%)		399 (7%)				
Total of Cases Referred to Free Legal Services	49 (6%)		467 (8%)	140 (13%)	932 (14%)	920 (30%)	68 (8%)
# cases receiving follow-up materials	209 (25%)		880 (16%)	37 (4%)	2,157 (32%)		132 (16%)
Total Calls Handled	1,334	1,919	5,513	920	10,880	5,015	1,357
OUTREACH	Approximate # of Seniors Reached through workshops, outreach activities and presentations						
# Seniors Reached	30		1,346	1,000			567
ADVOCATES							
# FTE Paid Advocates	2	2.9	1	1.25	7	2.8	1.2
Total Cases Closed by Volunteers			460				43
Total # Cases per Paid FTE	418	411	3,729	844	965	1,113	667
TOTAL COST							
Total Cost of Hotline	\$147,574	\$396,521	\$270,893	\$212,000	\$774,893	\$287,000	\$173,470
Average Cost per Case	\$176.52	\$332.65	\$47.68	\$200.95	\$119.66	\$92.13	\$205.78
Average Cost per Call	\$110.63	\$206.62	\$49.14	\$230.43	\$92.66	\$61.01	\$136.27

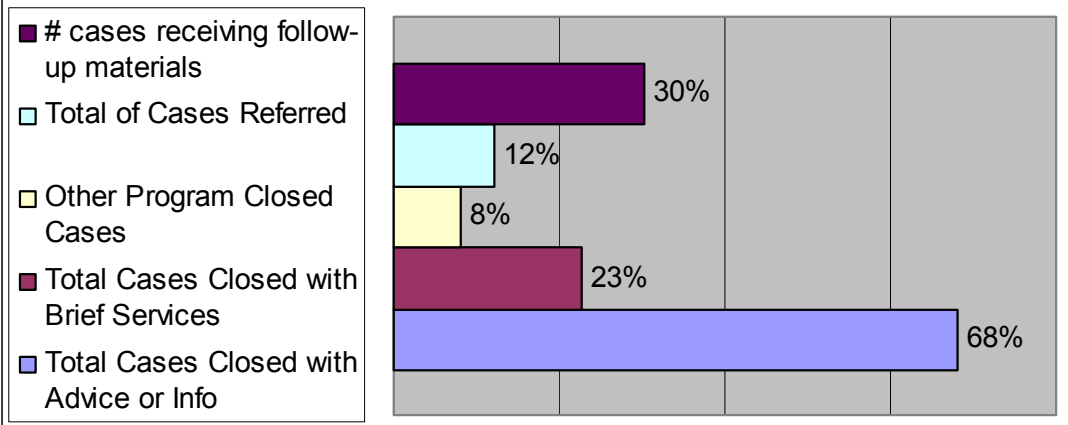
Productivity

Cases compared 2004, 2005, 2006 / Cases by service given

**Number of Cases Compared by Year
FY 2004, FY 2005, FY 2006 (on top)**



**Total Cases FY 2006
N=59,910**





Productivity Endnotes

Households and Calls

Some states are unable to easily count the number of households and/or calls they receive, so an estimate was made based on ratios related to the number of Cases Closed. The number of households served was calculated at 0.86 of Cases Closed; the number of Calls handled was calculated at 1.61 percent of Cases Closed. These ratios were derived from averages calculated from those hotlines which were able to provide data on all three categories: households, calls, and cases. Estimates for households were provided for AZ, HI, KY, MD. Estimates for calls were provided for AZ, NY, TX, WA, WV

Close Codes

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. In most of the hotlines, the total number of cases closed with **ADVICE** and **BRIEF SERVICE** totals approximately 100% of all the case closed by the hotline. In four states: DC, MD, TX and WV, the advice and brief service cases total to somewhat less than 100% because they used other codes to close cases including **REFERRAL** and **WITHDRAWAL**.

State Specific Notes

CA:

[1] Another breakdown worth noting is the differential in hours spent per case: 0.70 for "counsel and advice" cases, 2.71 for those with higher levels of service. The overall average was 0.90 hours.

[2] Virtually all clients receive a standard package: Survey, donation appeal, Senior Legal Checkup, flier on discounts and tax breaks. The number here represents those who received something extra, directly connected with their issue; and it is likely understated, as some volunteer advocates forget to register the data and it isn't always caught.

[3] Total calls handled is based on a count made for one month several years ago that established an average number of calls per case

[4] We don't tally these, so we can only guess. In-person presentations reached perhaps 1,000 or so; counting seniors who receive our written material through various channels or visit our web site for information, the number would be well into the tens of thousands, perhaps higher.

[5] Includes staff (6,384 hours) and volunteers (2,688 hours): This figure represents all time coded "case service." It includes not only time spent taking hotline calls, but also time spent on additional direct services for clients and time spent writing up hotline cases. It does not include time spent by staff attorneys consulting on cases being handled by paralegals, volunteers advocates or other attorneys, or time spent by attorneys reviewing other advocates' cases. Nor does it include time spent by advocates (mostly volunteers) conducting mediation for hotline clients.



Productivity Endnotes

[6] Number is an average for the year. It includes and counts as 1.0 each paid staff who do some hotline work but have other major responsibilities, such as the program manager and mediation project coordinator. Leave time is not included in the calculation.

[7] We don't track who closes each case. The number reported is the number opened by volunteers. Some of those were passed on to staff, but the reverse also happens. For instance, 55 cases show a volunteer listed as "co-counsel" in a case opened by a staff member. And the reverse was true in 238 cases.

ME:

In addition, the helpline handled 2,811 cases in its capacity as a member of Maine's State HICA Program

PA:

The reported total cost of the Pennsylvania SeniorLAW Helpline is the entire project budget, which includes not only the cost of operating the hotline/helpline, but also other project costs such as creating an electronic newsletter and enhanced website, conducting extensive statewide outreach, and developing a pro bono panel.

TX:

555 cases closed were closed as "referred after legal assessment not to free legal services".

WA:

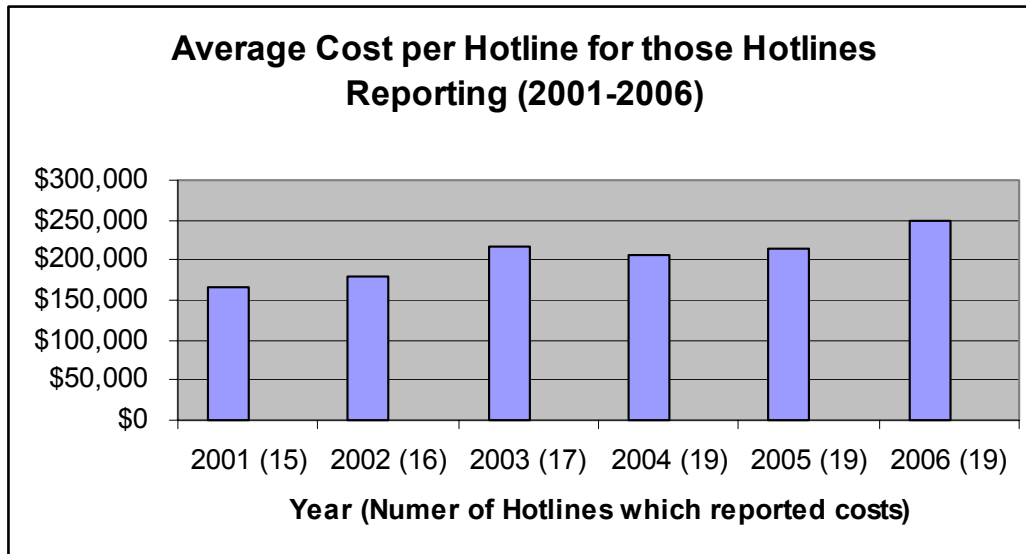
CLEAR*Sr is part of a program with 10 field offices that close cases opened by CLEAR*Sr. They also close cases opened at CLEAR and opened in their local offices. During this report period, the program closed over 20,000 cases. We are unable, however, to determine how many of those cases were opened at CLEAR*Sr.



Financial Comparisons 2001-2006

FINANCIAL COMPARISONS 2001, 2002, 2003, 2004, 2005 AND 2006

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	\$3,938,458	19	\$207,287
05	\$4,053,877	19	\$213,362
06	\$4,732,850	19	\$249,097





Costs and Income FY2006

ARIZONA 2006

Arizona Elder Law Legal Hotline

Southern Arizona Legal Aid
Former Title IV Grantee

TOTAL COST\$ 95,000

FUNDING SOURCES

Arizona Supreme Court.....\$ 95,000

CONNECTICUT 2006

Consumer Law Project for Elders

Connecticut Legal Services, Inc.
Current Title IV Grantee

TOTAL COST\$426,617

FUNDING SOURCES:

AoA Title IIIB Funds.....\$110,000
IOLTA.....\$253,144
The State of CT - Social Services
Block Grant.....\$ 48,069
United Way\$ 9,247
In-kind Support from State Department
on Aging (Mimi Peck-Llewellyn
– Consultant).....\$ 6,157

CALIFORNIA-2006

Senior Legal Hotline

Legal Services of Northern California
Former Title IV Grantee

TOTAL COST\$ 556,980

FUNDING SOURCES

Administration on Aging Title IV ..\$135,000
AoA Title IIIB funds\$ 54,034
One-time only for equipment
AAA\$ 6,498
AAA Title III-E funds\$ 45,391
Other Foundations\$219,454
Donations.....\$ 27,978
CSBG funds.....\$ 19,040
County Dispute Resolution
Program\$ 11,267
Training Revenues, material sales ..\$ 4,977
In-kind support from LSNC
(parent agency).....\$33,341

DISTRICT OF COLUMBIA

Legal Hotline for the Elderly

Legal Counsel for the Elderly
Former Title IV Grantee

GEORGIA 2006

Georgia Senior Legal Hotline

Atlanta Legal Aid Society
Former Title IV Grantee

TOTAL COST\$233,096

FUNDING SOURCES

State Department on Aging.....\$199,669
Atlanta Legal Aid Society.....\$ 20,565
In-kind Support from State
Department on Aging.....\$12,862



Costs and Income FY2006

HAWAII 2006

Senior Legal Hotline

Legal Aid Society of Hawaii
Former Title IV Grantee

TOTAL COST\$ 46,670

FUNDING SOURCES

Legal Services Corporation\$ 46,670

IOWA 2006

Legal Hotline for Older Iowans

Iowa Legal Aid
Current legal provider partner for Title IV Model Approaches and former Title IV grantee

TOTAL COST\$190,410

FUNDING SOURCES

AoA Title IIIB Funds.....\$ 58,936
Area Agency on Aging\$ 17,752
IO(L)TA\$ 26,270
Other Foundations.....\$ 17,275
Donations\$ 55
Legal Services Corporation.....\$ 44,260
Work Study/IOLTA\$ 21,057
In-kind support from volunteer
Attorneys.....\$ 4,805

IDAHO 2006

Idaho Senior Legal Hotline

Idaho Legal Aid Services
Current legal provider partner for Title IV Model Approaches and former Title IV grantee

TOTAL COST\$42,000

FUNDING SOURCES

Legal Services Corporation\$42,000

KANSAS 2006

Elder Law Hotline

Kansas Legal Services
Former Title IV Grantee

TOTAL COST\$ 11,405

FUNDING SOURCES

AoA Title IIIB Funds\$ 11,405



Costs and Income FY2006

KENTUCKY

Legal HelpLine for Older Kentuckians

Access to Justice Foundation
Former Title IV Grantee

MICHIGAN 2006

Legal Hotline for Michigan Seniors

Elder Law Of Michigan, Inc.
Current Title IV Grantee

MARYLAND 2006

Maryland Senior Legal Hotline

Legal Aid Bureau, Inc.
Current legal provider partner for Title IV Model Approaches and former Title IV grantee

TOTAL COST\$291,906

FUNDING SOURCES

Other Foundations\$215,000
Maryland Legal Assistance Network –
 Matching funds\$ 24,100
Legal Aid Bureau\$52,806

TOTAL COST\$360,900

FUNDING SOURCES

Administration on Aging Title IV ..\$150,000
State Department on Aging.....\$ 20,000
Area Agency on Aging\$ 3,900
IOLTA.....\$ 68,000
State Bar.....\$ 4,000
United Way\$ 3,000
Other Foundations.....\$ 50,000
Client Fees or Referral Fees\$ 2,000
Donations\$ 53,000
Pension Counseling.....\$ 5,000
Local Bar and Contracts.....\$ 2,000

MAINE 2006

Legal Services for the Elderly Helpline

Legal Services for the Elderly
Former Title IV Grantee

TOTAL COST\$157,715

FUNDING SOURCES

Health Insurance Counseling.....\$ 37,410
All other support is from Unrestricted
Sources\$120,305

NEBRASKA 2006

ElderAccessLine

Legal Aid of Nebraska
Current Title IV Grantee

TOTAL COST\$ 147,574

FUNDING SOURCES

Administration on Aging Title IV..\$ 109,574
Legal Services Corporation.....\$ 38,000



Costs and Income FY2006

NEW YORK 2006

New York Seniors Legal Assistance Project

Legal Services for the Elderly and City Bar Justice Center

Current Title IV Grantee

TOTAL COST\$ 396,521

FUNDING SOURCES

Administration on Aging Title IV . \$ 150,000
 In-Kind – variety of sources\$ 97,247
 Volunteer attorney hours\$149,274

OHIO 2006

Pro Seniors' Legal Hotline

Pro Seniors

Current Title IIIB provider

TOTAL COST\$270,893

FUNDING SOURCES

AoA Title IIIB Funds.....\$ 34,424
 IO(L)TA.....\$146,530
 United Way\$ 19,939
 Pension Counseling.....\$ 70,000

NORTH DAKOTA 2006

Senior Legal Hotline

Legal Services of North Dakota

*Current legal provider partner for Title ICV
 Model Approaches and Title IIIB provider*

TOTAL COST\$ 57,800

FUNDING SOURCES

AoA Title IIIB Funds\$ 57,800

PENNSYLVANIA 2006

Pennsylvania SeniorLAW Helpline

Current Title IV Grantee

TOTAL COST\$212,000

FUNDING SOURCES

Administration on Aging Title IV...\$150,000
 IOLTA.....\$ 60,000
 Pension Counseling.....\$ 2,000

The reported total cost of the Pennsylvania SeniorLAW Helpline is the entire project budget, which includes not only the cost of operating the hotline/helpline, but also other project costs such as creating an electronic newsletter and enhanced website, conducting extensive statewide outreach, and developing a pro bono panel.



Costs and Income FY2006

TEXAS 2006

Legal Hotline for Texans

Texas Legal Services Center

TOTAL COST\$774,893

FUNDING SOURCES

State Department on Aging\$173,000
 Client Fees or Referral Fees\$ 360
 Donations.....\$ 402
 Pension Counseling\$ 60,316
 BCLS (Basic Civil Legal
 Services)\$295,899
 CVCLS (Crime Victim Civil
 Legal Services)\$146,709
 Attorney General's Crime Victims
 Assistance\$ 77,207
 In-Kind - OAA Senior Aide\$ 12,000
 State Bar (malpractice insurance
 & library).....\$ 9,000

WASHINGTON 2006

CLEAR*Sr. – Coordinated Legal Education, Advice and Referral for Seniors

Northwest Justice Project

Former Title IV Grantee

TOTAL COST\$287,000

FUNDING SOURCES

Administration on Aging Title IV...\$100,000
 Area Agency on Aging\$100,000
 In-kind Support from State of
 Washington (OCLA).....\$ 87,000

WEST VIRGINIA 2006

Senior Legal Hotline

West Virginia Senior Legal Aid, Inc.

*Former Title IV Grantee and Current Title IIIB
 provider*

TOTAL COST\$173,470

FUNDING SOURCES

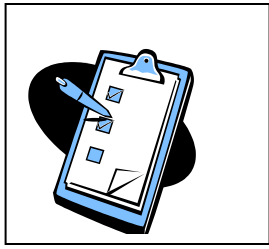
Administration on Aging Title IIIB \$ 74,732
 State Department on Aging.....\$ 28,261
 IO(L)TA\$ 28,252
 State Bar.....\$ 5,625
 Donations\$ 955
 Other: (LTC ombuds, honoraria, law
 student fundraiser, summer
 fellowship program).....\$ 35,645

FUNDING SOURCES



\$4,732,850 TOTAL REPORTED FOR 19 HOTLINES

<u>Funding Sources '06</u>	<u>Totals</u>	<u>Percentage of Total</u>
Administration on Aging Title IV IO(L)TA	\$794,574	16.79%
Other	\$582,196	12.30%
Other Foundations	\$576,517	12.18%
State Department on Aging	\$501,729	10.60%
In-kind Support	\$420,930	8.89%
AoA Title IIIB Funds	\$411,686	8.70%
Legal Services Corporation	\$401,331	8.48%
Pension Counseling	\$170,930	3.61%
Area Agency on Aging	\$137,316	2.90%
Unrestricted Sources	\$128,150	2.71%
Arizona Supreme Court	\$120,305	2.54%
Donations	\$95,000	2.01%
Legal Aid Bureau	\$82,390	1.74%
CT block grant	\$52,806	1.12%
AAA Title III-E funds	\$48,069	1.02%
Health Insurance Counseling	\$45,391	0.96%
United Way	\$37,410	0.79%
MD Legal Assistance Network	\$32,186	0.68%
Atlanta Legal Aid	\$24,100	0.51%
CSBG funds	\$20,565	0.43%
County Dispute Resolution Program	\$19,040	0.40%
State Bar	\$11,267	0.24%
Training Revenues, material sales	\$9,625	0.20%
Client Fees or Referral Fees	\$4,977	0.11%
Local Bar and Contracts	\$2,360	0.05%
	<u>\$2,000</u>	<u>0.04%</u>
	\$4,732,850	100.00%

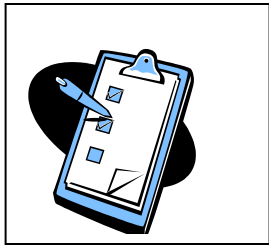


SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2005 – September 30, 2006

CALIFORNIA 2006

Summary of significant events

- The year's figures look a lot like those from the previous year. One attorney, who had spent half time on hotline work and half with the mediation program, departed. After a brief hiatus he was replaced by a full time paralegal and a part-time attorney for mediation. The transition caused some reduction in case work from what might have been, given increased efficiency and more volunteers, as did the fact that the program manager was forced to reduce his time spent on case work from 21 percent the previous year to 17 percent, while increasing time spent fund raising from 8 percent to 14 percent.
- A development not reflected in the case numbers is that SLH continues to become more of a statewide program. Southern California cases rose from virtually none in FY 2003 to 8 percent of the total in 2004, 16 percent in 2005 and 24 percent in 2006. This is still far short of the south's proportion of the population, however – about two-thirds of the state's seniors.
- It has become harder and harder to get service from the hotline as word continues to filter out even without major outreach efforts. At the end of a typical day, several dozen callers remain unserved.
- Things looked particularly dire as the fiscal year was nearing its end, with loss of ability to compete for a new AOA grant and \$150,000 in foundation grants ending. A large-scale effort to obtain state funding for the first time fell short in 2006.
- With AARP Foundation support we attempted to find seniors who would benefit from applying for the Medicare Part D extra help program, but the results were disappointing. We are bracing for an influx of calls in November and December due to an ad campaign in Southern California, all apparently in Spanish.
- Our phone mediation program continued into a second year, with some new grant funding. Techniques employed were already changing significantly even before the departure of the attorney who began the project. More changes are afoot since, but all in all, we are very encouraged by the results being achieved.
- The hotline's first two VISTA members began work. One is helping with various fund-raising and outreach efforts, the other concentrating almost exclusively on building multilingual capacity.



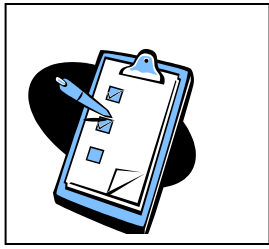
SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2005 – September 30, 2006

CONNECTICUT 2006

- Extended Services. Our percentage of extended services cases is currently at 56%.
- CLPE Mobile Law Unit (MLU). The CLPE held 12 MLU events in underserved communities identified through GIS Mapping technology during this reporting period. 390 seniors attended these events and 22 cases were opened during on-site office hours.
- Increased services to homebound seniors. This period we opened 46 cases as a result of referrals of homebound seniors by case-managers of Connecticut's Access Agencies. To date, we have served 71 homebound seniors through this new initiative.
- Medicare Part D. The CLPE continued screening all callers into the hotline for eligibility for the Medicare Part D Low Income Subsidy (Extra-Help) until May 15, 2006, when the first open enrollment period ended. We have now changed our focus to cases where seniors are being billed/dunned by a Medicare Part D plan that in which they were not enrolled.
- Volunteer Services. The CLPE had a volunteer attorney join its staff in July 2006. Carole Masters began working for the CLPE 3 days a week for 5 hours per day. Attorney Masters is handling hotline calls and cases and is assisting with creation of fact sheets and marketing of the CLPE.
- Enhancement of CLPE and Statewide Legal Services (SLS) Partnership. The CLPE and SLS began working together to enhance the consumer law section of Legal Services staff intranet.

The Project Manager and Attorney Bonnie Roswig of SLS

- meet at least quarterly to discuss consumer law issues affecting both programs
 - established a Statewide Consumer Law Task Force and held meetings in April and June 2006
 - addressed an inequity involving debtors in Small Claims Court with Court Operations personnel
- Participation in AARP Connecticut's "Livable Communities" project. The CLPE was invited to participate in AARP's Livable Communities Demonstration project. The goal of the Livable Communities project is to ensure that people 50 and older have affordable housing options and on-site social and legal services to meet their needs as they age.



SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2005 – September 30, 2006

GEORGIA 2006

- **Staff and Database Changes**

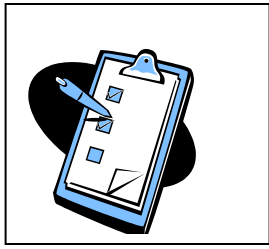
In July 2006, one part-time attorney left the Hotline. Therefore due to this loss and an increase in call volume, the Hotline hired two part-time attorneys. Both attorneys have worked with seniors in previous positions as staff attorneys for the Atlanta Legal Aid Society, Inc. The Hotline had two law students for the summer who assisted with researching legal issues and taking client calls under the supervision of an attorney. In February 2006, a part-time receptionist was hired through the Title V program. The receptionist answers the phones and assists with mailing information to clients and making referrals to other agencies. The contract for the part-time receptionist will end February 2007. At that time, the calls to the Hotline will no longer be answered live. The attorneys will take turns listening to the messages left on the voicemail system and entering the calls into the system database.

- Beginning January 1, 2007, the Hotline will no longer use Kemps to input and track calls and cases. The Atlanta Legal Aid Society, Inc. recently changed their full service offices to an internet based system similar to Kemps. As a division of the Atlanta Legal Aid Society, Inc, the Hotline will also be converting to the new system. This will be a significant change in the way the Hotline does business.

- **Special Projects**

Qualified Income Trusts – Since the adult medically needy category of Medicaid for nursing home residents was eliminated in Georgia in 2004, the Hotline has served as a screening center for nursing home residents and their families to understand the change and the new Qualified Income Trust that they must put in place so that the resident can get Medicaid. In 2004, the Hotline partnered with a private law firm to assist with execution of the Qualified Income Trusts for nursing home residents. The Hotline refers clients to the private law firm and the lawyers will either meet with the resident’s family in their office or go to the nursing home to meet with the resident and his/her family to execute the trust. This year the project had continued success with the referral of approximately 100 of these trusts to the private law firm.

- Kinship Care Project – On October 15, 2005, the Hotline received a new Kinship Care grant to give legal advice and brief service to grandparents and relative caregivers of *any* age. Since the grant’s inception, the Hotline has screened *all* callers for kinship care issues and provided appropriate services. Between October 15, 2005 and May 31, 2006, the Hotline screened approximately 9,129 calls. In those first eight months of the contract, few “non-senior” relative caregivers called the Hotline to request legal advice or service because they were not aware that the Hotline had expanded its services to people under 60. In response, the Hotline created a flyer advertising its expanded services, now available to kinship care callers regardless of their age. Since the flyer’s distribution through statewide Area Agencies on Aging and the Georgia



SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2005 – September 30, 2006

- Kinship Care Coalition, the Hotline has seen an increase in kinship care callers. We expect further increases from the collaborations we have developed to advertise our services.

HAWAII 2006

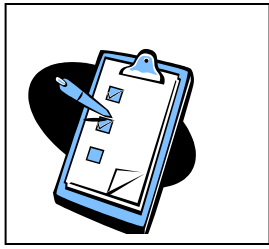
- We continue to run the Senior Legal Hotline primarily with LSC funding, but for clients in Maui and Hawaii counties, we also have Title III grants to assist seniors regardless of LSC eligibility. We also received a HUD grant to provide reverse mortgage counseling, which, in the face of skyrocketing real estate prices and low interest rates, resulted in an avalanche of reverse mortgage cases (219 cases closed during the year). The new Medicare Part D program also helped boost the number of seniors served in fiscal 2006, during which we assisted 331 clients to choose the best Part D plan for them. Overall, we increased our closed cases for seniors by 18 percent.

IDAHO 2006

- Idaho Legal AID Services, Inc., (ILAS) started and maintained the Senior Legal Hotline for three years with a grant from the U.S. Department of Health and Human Services. That grant ended in September 2005. Because the hotline had proved an effective means of meeting the needs of senior citizens, ILAS made a commitment to maintaining the line by diverting funds within the program. Because we could not use the funds to serve over-income clients, the hotline services was reduced to those senior callers who were LSC eligible.
- ILAS conducted a campaign to publicize the reduced scope of its service. The line was otherwise run as it had been previously. Hours of operation remained from 9:00 a.m. to 3:00 p.m. In addition to giving advice, the line served as an intake screen for referral to area ILAS offices for extended representation where appropriate. Over-income callers were referred to local offices for representation under non-means tested funding. Jim Cook, the attorney who had staffed the line for three years, continued to do so on a half-time basis.
- In 2006, ILAS wrote a grant to successfully revive the hotline for all seniors effective October 1, 2006.

MICHIGAN 2006

- The Legal Hotline for Michigan Seniors has been quite busy during this fiscal year. In April, we replaced our phone system and expanded our capacity by switching our phone lines from



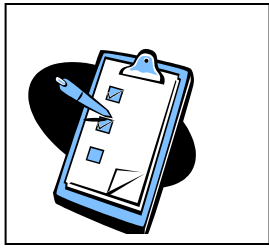
SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2005 – September 30, 2006

analog to a PRI. We embarked on an outreach campaign to reach the service providers that care for seniors. This has proven quite effective in increasing our name recognition among the aging network and resulted in many more referrals to the Hotline. Both of these have caused our call volume to double in the last 6 months of this period.

- Also during this time, we placed a focus on our website and materials. We implemented www.legalhotlineonline.org and have seen our web hits go from 4,000 a month to over 50,000 a month. Our referrals through the web have grown 200% during this year.
- As part of our grant, we focused on Health Care Powers of Attorney. We helped over 500 seniors complete the Michigan Durable Power of Attorney for Health Care Form.
- We were able to add two part-time attorneys to our hotline with funds from additional grants. These two attorneys were volunteer attorneys prior to being hired and are a real asset to our hotline.

NEBRASKA 2006

- Fiscal 2006 was our first year in operation. Margaret Schaefer was hired full time in November of 2005 to be the attorney on the ElderAccessLine. Margaret is a member of the Nebraska and Idaho Bars, and is a certified mediator. She has served as President of the Board of the Rape and Domestic Abuse Program and has volunteered with many other nonprofit organizations. Margaret is responsible for day to day operations of the ElderAccessLine, including advising callers and providing brief services.
- Jean White transferred from a position as a paralegal on the AccessLine to work full time on the ElderAccessLine. She was with the AccessLine for nearly 5 years. Jean is responsible for assessing for conflicts of interest, taking applications from clients, and making referrals with the advice of the attorney.
- The ElderAccessLine began service on December 12, 2005. Three phone lines are dedicated to the project. During this fiscal year, the lines were open 3 hours a day from 9-12 am on Monday, Wednesday, and Friday, and from 12-3 pm on Tuesday and Thursday.
- Since the ElderAccessLine is a new project we did extensive outreach and publicity. A press release was mailed to news outlets state-wide prior to the line opening. We received a wonderful response. Newspapers throughout the state printed articles, and the Public Radio Station that covers most of Nebraska did a nice piece. In Omaha a network of local commercial radio stations ran a segment on the ElderAccessLine on December 12, (the day the project opened) that ran every half hour all morning. A follow up press release was sent a few



SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2005 – September 30, 2006

weeks later, resulting in more newspaper articles. Margaret and Annette Farnan, Director of Access and Support, were on a mid day television news and events show on KETV Omaha in late December.

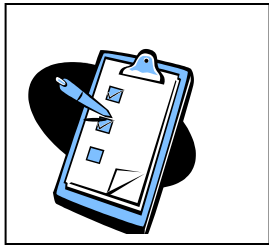
- In February Annette was interviewed by WOWT Omaha for their mid Saturday News and Events show. In addition, WOWT Omaha did a news story for their evening news program which included a nice interview with a client. The story was the lead for the 4:00 pm newscast, and ran again at 6:00 pm and 10:00 pm.
- Posters and Brochures were developed for the ElderAccessLine. These were sent to Nebraska's Area Agencies on Aging, Nebraska Department of Health and Human Services, local offices, Senior Centers, Clerks for all the County Courts, 7-Can Help, Dahman Neighborhood, Food Banks, Assisted Living Facilities, The administrative offices of Church Denominations, and the University Extension Offices. Approximately 1000 posters and 1000 brochures have been distributed throughout the State of Nebraska during this fiscal year.

NORTH DAKOTA

- Our participation with the AARP Medicare Part D Extra Help project did not produce the numbers we estimated but it did result in our creating partnerships with medical service providers that did not exist before. We also were able to help applicants with many other legal issues in spite of their lack of need for Extra Help. We found many individuals who were eligible for Medicare Savings Programs but had not applied to social services.
- In the latter part of 2006, Legal Services of ND began communicating with the State Bar Assn of ND regarding a joint intake effort. As of the middle of February our Central Intake and Senior Legal Hotline now also take applications for the SBAND's volunteer lawyer and reduce fee programs. The combined intake process now eliminates the need for applicants to call separate numbers and provide duplicative information. It allows SBAND to spend all of their efforts on placing applicants in the appropriate program. The joint intake also prevents people from being sent back and forth between programs.

OHIO 2006

- In September 2006, Pro Seniors' Ohio Senior Legal Hotline hired a new Hotline Managing Attorney, Mike Walters. Mike had been a part-time hotline attorney since 2000 as well as having an active Social Security and Criminal Law private practice prior to joining Pro Seniors full time.



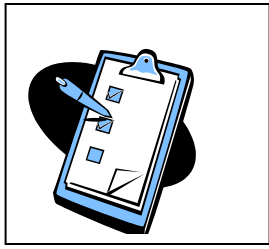
SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2005 – September 30, 2006

- Pro Seniors ran a Medicare Part D project funded by the AARP Foundation and National City Bank. We hired a part-time project manager, who was also an attorney, and a part-time project assistant who helped seniors choose a PDP and apply for SSA's LIS program.
- We also did 28 community presentations on Part D including: 4 local TV evening news spots, 3 local radio talk shows, 2 Cincinnati Enquirer newspaper articles and 1 Cleveland Plain Dealer article, 1 Ohio State Bar Association CLE presentation, 6 presentations to Social Workers, RNs and other professionals serving seniors, and 11 to community and senior groups including the Urban League and Rotary Club.
- We hired 2 new part-time hotline attorney staff to replace Mike Walters and Nancy Griffiths who left to spend more time in her private law practice.
- Our Pension Rights Project expanded to include Kentucky as well as Ohio.

PENNSYLVANIA 2006

Pennsylvania SeniorLAW Helpline experienced a number of significant changes this fiscal year, thanks to our US Administration on Aging grant, as follows:

- **Staffing:** We hired a full-time supervising attorney (Sue Wasserkrug) in January 2006, and a full-time Legal Advocate (Jessica Long) in May 2006. (The number of hours worked by hotline advocates reflects the fact that Jessica was hired in May.) As a result of our new staffing structure, we designed and implemented a variety of protocols, e.g., an intake and scheduling protocol.
- **Outreach:** We successfully focused our outreach on particularly underserved and vulnerable seniors, including those who are language and cultural minorities, low income, and/or isolated due to rural location or poor health (i.e., homebound). To most effectively spread the word about the Helpline to these communities, we collaborated with local, regional and statewide membership organizations, coalitions and service providers. Outreach activities included presentations, workshops, and staffing tables at community fairs. To communicate with limited-English speakers, we used Language Line, which allows for instant interpretation in 150 different languages. We also translated our outreach materials (fliers) into six languages (Spanish, Chinese, Russian, Korean, Vietnamese and Cambodian) and we created promotional items (refrigerator magnets) in English, Spanish and Chinese.
- **Legal Resource Directory:** We surveyed numerous service providers throughout the state (e.g., AAAs, bar associations, legal services offices) and put together a comprehensive directory of



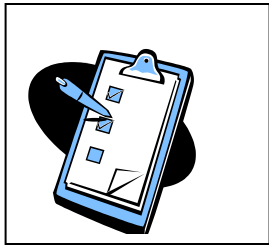
SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2005 – September 30, 2006

legal resources available in Pennsylvania. The directory is organized by county, with a statewide section at the end.

- Client Survey: We developed and implemented a survey to assess client satisfaction and outcomes. We are in the process of analyzing results, which appear to be very positive.
- E-newsletter: We drafted content covering legal issues and news of interest to seniors in Pennsylvania for an electronic newsletter and are preparing to send it this fall. We collected hundreds of email addresses from seniors (Helpline callers) as well as service providers.
- Pro bono panel: In partnership with a large law firm that has offices in several locations in Pennsylvania, we created a pro bono panel to increase the number of seniors we are able to serve. A group of lawyers was recently trained and has started to take calls (after 9/30/06) on a regular basis.
- Pension program: We are now partnering with the Michigan Pension Rights Project to provide enhanced service, including investigation and advocacy, for callers with problems related to pensions and retirement benefits.
- Trends: We saw an increase in the number of language, ethnic and cultural minority seniors served: up to almost 16% in the past six months (7/1/06-9/30/06), as opposed to 9% in the previous six months and much less before that. We have served seniors in all 67 counties of Pennsylvania. We continue to see a wide range of legal issues, although consumer issues and estates matters constitute the two largest categories of our calls.

WASHINGTON 2006

- In May, CLEAR*Sr said farewell to Ellie Lende, and welcomed Beau Haynes as our new project coordinator.
- CLEAR*Sr staff continued work on an AoA-funded project to determine whether following up with clients who received pro se action steps would increase the likelihood of a favorable outcome. CLEAR*Sr also continued work under seven Title IIIB contracts covering 26 counties in the state of Washington.
- Our work during October 1, 2005 – Sept. 30, 2006 included following up with clients, conducting outreach visits to senior service providers, holding our second Community Advisory Committee meeting and hosting two Seniors Task Force meetings..



SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2005 – September 30, 2006

WEST VIRGINIA 2006

- **Fiscal:** We sadly spent the last of our rainy day fund by the end of this fiscal year, which left us without enough money to support a staff attorney position anymore. So as of 10/1/06 Cathy McConnell (exec director) is also handling all the clients. We have been working together with the statewide LSC provider (LAWV) and the law school clinic and the law school public service programs to try to fund a joint developer position to hire a person to work on funding for all of us. It's going slowly, but the state bar has committed some money to the effort.
- **Personnel:** We hired a new part-time intake person through Title V, and had some old and some new work/study students helping with intake and other things. Cathy got an award from WVU Law School's Women's Law Caucus for Public Interest Attorney of the year!
- **Service distribution:** Our outreach efforts are really paying off, we again served clients in every county of the state (some of our counties only have 1000 senior residents), and increased our client numbers in all of our target counties, most of which are extremely rural coalfield areas.
- **Elderlaw info dissemination coupled with outreach:** Cathy created an Elderlaw 101 for Social Workers workshop, presented it to a small group for continuing education credit, and got rave reviews. The WVU Social Work department has asked her to replicate in several other mutually agreed-upon areas of the state. This will create great outreach opportunities in our target areas and all the costs will be entirely underwritten by WVU. She also gave numerous workshops at various events on topics including victimization of vulnerable adults, due process and disabilities, long-term care Medicaid planning, Medicaid myths and estate recovery, intestate succession, and protecting yourself from financial exploitation.