Legal Hotline Connection
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Running a Hotline is More than Answering the Phone: Handling a Hotline Call

By Michael Walters, Legal Hotline Managing Attorney, Pro Seniors, Inc. and CERA Project Specialist

The preconference at the Equal Justice Conference in Chicago included a full day of programming devoted to legal hotlines. Running a Hotline is More than Answering the Phone: A Collaborative Workshop was well attended by hotline managers and advocates throughout the United States. The sessions were highly interactive among the participants and included a lively exchange of ideas on ways to staff and operate a legal hotline.

Laurel Heer Dale, Director of ElderAccessLine® at Legal Aid of Nebraska, and I covered the topic of How Many Ways Can you Handle a Hotline Call? We discussed models, such as the traditional appointment and callback system we use at Pro Seniors, as well hotlines which answer calls with live attorneys (or non-attorney advocates) and hotlines which are using voicemail as part (or all) of their intake system. The newer models are designed to minimize situations where the client cannot be reached for a call-back. Also, answering the call by a "live" advocate eliminates the duplicative process of screening/intake vs. providing advice to the client in a separate call.

Approximately sixteen hotlines shared their intake models prior to the conference and an Excel spreadsheet compiled by Laurel is included in the materials linked above. The representative sample reveals that hotlines are evenly divided between the traditional method of scheduled callbacks vs. variations such as voicemail or "live" advice. Not surprisingly, online intake systems are becoming more popular as a supplement to intaking clients by telephone.

We discussed newer technologies such as automated callback systems, which actually put the client on the telephone line before having the client sent to an advocate. Hotline models which screen and route the client based on the substantive legal issue allow the hotline to train advocates in only a few substantive areas of the law, and are designed to reduce the long-

standing problem of how to effectively train an advocate for a hotline in which the client could be calling about virtually any legal issue. Newer case management systems allow the telephone system and the case management system to be fully integrated, allowing for a more efficient analysis of call volume and use of staff time.

Technology often advances more rapidly than understanding of how new technology can be used. The sharing of information among hotline managers on ways that new technology and business models can be applied in the hotline context is a vital tool for hotlines in learning how to work more efficiently and in a more cost-effective manner. Communication among hotline advocates allows hotlines to use the best new ideas and technology in ways that best fit the clientele and volume of individual hotlines.

Running a Hotline is More than Answering the Phone: You're Done with the Call, Now What?

By Christopher Jackson, Communications Coordinator, Elder Law of Michigan, and Project Administrator, CERA

During the second session of the Preconference, I had the wonderful opportunity to work with Cat McConnell, West Virginia Senior Legal Hotline, to discuss with attendees what should be done after completing a hotline call. There are many data points that can be useful to gather following hotline calls, including: outcome data, client satisfaction, and indicators of impact. Below are some of the points covered in our presentation and discussion with attendees.

Outcome Measures

In 2015, Legal Hotlines in Michigan, Florida, and Ohio began testing an outcome measures component in their case management system to collect the outcome of cases handled by the hotlines; more about the outcome measures project can be found here. Much discussion occurred with participants on this topic, especially about when outcomes can be best recorded, whether all seniors can effectively

determine what the outcome of a case was, and can all case types have effective measurement of their outcome. Many participates stated that they were interested in testing outcome measures on their hotlines in the future to both determine the effectiveness of their services as well as provide valuable data to their funders.

Satisfaction Surveys

Satisfaction surveys were also discussed at length during this session. Many hotlines provide satisfaction surveys to their clients immediately or sometime during the month following their contact with the hotline. The detail requested by each hotline as part of the survey varies in complexity, some hotlines ask just a few questions, while others are more in depth in asking for feedback; examples of these surveys can be found on our website. Importantly, the tools used to gather this information also varied dramatically amongst the hotlines including through direct attorney/staff conversation, mailings, internet survey tools, and via email; one hotline even utilizes text messaging to gather client feedback. Gathering this feedback is important because many hotlines use the feedback in important ways: streamlining operational processes, providing training opportunities for advocates and staff, and providing feedback and data to funders.

Overall, as we live and work in an increasingly data-driven world, it has never been more important for hotlines to gather data on the services they provide. This data is increasingly used by funders and staff to determine the need for hotline services, as well as the areas, both subject matter and geographic, they serve. Ultimately, hotlines will need to engage this data-driven culture to demonstrate just how many important services they provide to their communities.

Running a Hotline is More than Answering the Phone: Hotline Staffing Models

By Mary Haberland, Managing Attorney, Florida Senior Legal Helpline, and CERA Project Specialist

Margery Klausner and I facilitated an afternoon session of Running a Hotline is More than Answering the Phone: A Collaborative Workshop on hotline staffing models, "The Whole is Greater Than the Sum of its Parts." Margery is the director of the Counsel & Advocacy Law Line (CALL), a division of Lakeshore Legal Aid in Michigan. We began by informally polling the

approximately 30 participants about the staffing models they use for their hotlines. The majority of those attending used some type of "front-back" model, meaning they employ different staff to answer calls and complete client applications before forwarding the caller on for legal advice. Only three of the attending hotline managers reported staffing solely with attorneys. Fifty percent of us use law students to provide legal advice, and approximately 30% incorporate volunteers in their models. We then separated the group by tables to discuss the merits of using a separate screening unit vs. having legal advocates completing the application through advice; live calls vs. callback appointments; full-time vs. part-time employees; attorneys vs. paralegals; incorporating volunteers, emeritus attorneys, and law students; and using remote staffing. The goal wasn't finding "the best" staffing model; most of us staff according to resources, funding, as well as technology. The value of the session was in considering the questions, and learning how we could improve our own models by incorporating ideas shared by participants in response to each new topic we considered.

Much of our discussion centered on remote staffing and how this impacts our hiring, training, and communication practices. We all agreed that except for the situation when an experienced team attorney elects to work from home, new "remote hires" need to spend some time in the office learning hotline procedures and taking calls under close supervision before they can move off-site. Is it better to hire new attorneys, those with prior but relatively brief Legal Services experience, or private attorneys who are very knowledgeable about substantive areas? Many thought that hiring hotline attorneys with Legal Services experience was desirable in terms of their expectations about the rate of pay, our clients, and their long-term commitment to the organization. Additionally, these attorneys come with knowledge about poverty law subjects seldom encountered in private practice, such as subsidized housing and complex senior benefits issues. Others thought technology experience was valuable, and were willing to train newly-licensed attorneys about substantive law if they came with more advanced technological skills. We discussed compensation during this segment and discovered that the hourly wages we pay our part-time attorneys vary widely. There was general consensus that the trade-off for relatively low pay can be a flexible schedule, payment of professional dues, providing training opportunities, and on some hotlines, allowing attorneys to maintain an outside practice of law.

We also compared our staff supervision models. All of us agreed managers should review every legal file for new hires initially, but we varied widely in our practices once our attorneys had completed a probationary period. Some programs always review every hotline file regardless of the attorney's level of experience, and staff one or more dedicated case reviewers for their hotlines. Others release attorneys from mandatory review while continuing to provide feedback upon request for unfamiliar or complex legal issues. Similarly, we varied on whether we have written supervision policies. A few do, while others communicate policies in e-mails or conference calls. Conference calls can also be used for team meetings, although several programs require that all staff – whether working in the office or off-site – meet periodically for case reviews and other purposes. While off-site staff can lose the benefit of having "real time" discussions with their supervisors and peers, some of us use Skype for Business, Yammer, and Google Chat to provide instant messaging for "instant answers."

Before our time ran out we talked about employee evaluations, and whether traditional evaluations were still useful. Several programs reported that they are required to do periodic evaluations by funders, while at the other extreme a few participants said that because they no longer have the ability to give merit raises, they no longer do evaluations. When evaluations are provided our methods ranged from face-to-face conferences, to written performance summaries prepared by the employee's manager, to a ratification (or not) of an employee's self-evaluation. We had to conclude our session before completing all of our topics, but it was a wonderful experience to see the room as full and the participants as animated for the last afternoon session as when we arrived for the preconference that morning.

Running a Hotline is More than Answering the Phone: Does it Cost Too Much to Use Free Help?

By Keith Morris, President, Elder Law of Michigan, and Director, CERA

For the final session of the Preconference, I had the pleasure of working with Leslie Wallin, Supervising Attorney, CARPLS Legal Aid, to lead the discussion on how legal hotlines use law students and volunteers to help meet the demand for services. As you would expect, there were many different approaches and philosophies on this topic.

Leslie and I started the discussion by describing how each of our programs used volunteers and law students. Both CARPLS and the Legal Hotline for Michigan Seniors placed a value on the training of law students for future legal aid attorneys. We also both recognized the need to

change the system to accommodate the good volunteers, and not try to fit them into our regular dynamics. Here are some of the questions we discussed with the participants:

1. Who volunteers at our hotlines?
2. Why do people volunteer at your organization?
3. Why use volunteers?
4. What does it cost to use volunteers?
5. What are your recruitment and selection practices?
6. What types of training do you do?
7. What type of commitment do you ask from your volunteers?
8. How do you determine if it is worth the costs to use the free help?

There were quite a few suggestions on how to make the decision of whether to use volunteers and law students. With the new ABA rule requiring law students to complete service hours before graduating, it is a perfect time to consider a partnership with a law school and utilize the law students. However, it is definitely not as easy as all that. You have to do a cost-benefit analysis, both in terms of real costs and intangible costs. Take a look at the materials from the preconference for some of the suggestions on deciding whether to use volunteers and law students, how to handle them once they are there, and how to determine if you are using your resources wisely.

A special thanks to everyone that contributed additional resources to share and also to everyone that freely shared their insights and experiences with others. It was a very uplifting day to be with colleagues that truly understand the challenges of hotlines.