

## 2006 Equal Justice Conference

### WSR 057 Part I and II

#### Roadmap to Implementation: A Working Group for Telephone Based Systems Providing Intake, Advice/Brief Services

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#### **Brief Description:**

This two session workshop will explore issues regarding the planning, start up, operation, maturation and ongoing evolution of a telephone based delivery system. The session will address intake, advice, brief services and referral systems in both large and small legal services programs. The presentation will give practical tools and hands on, individualized assistance to programs interested in developing this aspect of their delivery systems.

#### **Topical Outline:**

##### **1. Big Picture and Getting Started**

- Vision of Hotline
- Statistical Goals (increased full representation, increased numbers served, increase in specific population served, decrease in hold time, increased hours of operation, increase in geographical area served)
- Models of Hotlines
- Scope of Hotline (intake, C/A, brief service)
- Hotline Services
- Barriers to Hotline and Concerns
- Budget Overview and Considerations
- Staff Resistance and Buy-In Approaches
- Goals of the Hotline for Staff
- Goals of the Hotline for Clients
- Goals for larger legal aid network
- Baseline Data Collection

## **2. Staffing**

- Supervision models
- Staffing models
- Hiring considerations
- Remote versus centralized
- Bilingual considerations
- Attorney versus paralegal
- Law students and pro bono volunteers
- Existing versus new staffing
- Mixed staffing

## **3. Room and Equipment**

- Central office needs

## **4. Technology**

- Telephone Technology
- Case Management System

## **5. Ethics, Policies and Conflicts**

- Existing conflict policies by office
- Existing eligibility practices by office
- Redefined eligibility and conflicts practices for Hotline
- Documentation of defined approach
- ABA Standards as a Guideline
- Unbundled Services protocols and ethics
- Ethics on Counsel and Advice and Limited Representation

## **6. Materials and Supervision Structures**

- Necessary Materials
  - Case Handling Protocols (Case Acceptance Criteria; Case Triage)
  - Questionnaires
  - Scripts
  - Referral Networks
  - Self help
  - Online resources
- Policies for Staff Involvement and Review
- Policies for Updates
- Integration of materials into technology venue (CMS, HotDocs, Website, Word, Paper)

## **7. Training**

- Training date and content
- On-Going Training
- Staff involvement

## **8. Hiring and Retention**

- Job Descriptions
- Pitfalls and Lessons Learned
- Skills needed
- Performance standards
- Retention

## **9. Integration with Programs and Existing Services**

### **a. Full Service Staff or Programs**

- Communication mechanism between Hotline and Full Service Staff
- Role of Hotline with Full Service Staff or Other Programs
- Sample mechanisms of integration and data sharing

### **b. Integration with Statewide Website**

- Mechanisms of Integration with Statewide Website

### **c. Integration with Partner Agencies**

## **10. Evaluation and Statistics**

### **a. Baseline statistics & On-going methods of reporting:**

- i.** Cases by office
- ii.** Cases by LEP or age
- iii.** Percentage of C/A versus full service
- iv.** Hold times
- v.** Problem code statistics