

**What Happens After the Call?  
Incorporating Follow-Up Plans for Hotline Clients**  
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**Brief Description:**

Panelists report results from several hotline client outcome studies and present procedures for incorporating client outcome tracking into the hotline workflow. The workshop covers factors to be considered in identifying clients who might need additional assistance in performing tasks to solve a legal problem versus clients who might be good candidates for self advocacy.

**Topical Outline:**

**I. Legal Hotline Client Outcomes Study 2006 Results; Shoshanna Ehrlich, AARP Foundation**

Seven diverse legal hotlines administered a survey to hotline clients who had been told to take a follow up action in a consumer or public benefits matter.

**A. Consumer Clients**

1. 72% of callers with consumer cases reporting taking action; of those that did not take action, 34% still planned on doing so.
2. 55% of consumer clients reported a change for the better; 41% were still awaiting the results of their action.
3. Significant Demographic Differences among consumer clients:
  - a. Older clients (40+) were more likely to take action than younger clients;
  - b. Men and Non-LSC eligible clients were more likely to report a change for the better;
  - c. Gender, LSC eligibility or whether the client lived alone did not affect the propensity to take action.

**B. Public Benefits Clients**

1. 78% reported taking the action suggested; 53% of the rest still planned on doing so.
2. 65% reported a change for the better; 40% were still awaiting results.
3. Demographic Differences:
  - a. Oldest group of clients were less likely to take action;
  - b. Gender, LSC eligibility, nor living alone did not affect propensity to take action or results achieved.

**II. Marshalling use of limited hotline resources, Joan Kleinberg, CLEAR**  
Where hotline resources are inadequate to meet the need, hotline managers must determine how to provide the most effective and meaningful services

- A. Some clients are able to use advice and “action steps” to resolve their problem and some are less likely to do so.**
- B. Assessing client’s functional capacity is one way to predict whether advice will result in client’s ability to resolve problem or whether brief service is necessary.**
- C. Functional Capacity Assessment Tool provides some questions and guidelines to help determine appropriate level of service.**
  - 1. How person processes information and articulates problem
  - 2. Person’s level of literacy
  - 3. Person’s history with problem-solving
- D. Make assessment at time of initial interview or upon follow-up if action steps not taken.**
- E. Use this as a starting point to determine how your program assesses whether person likely to be able to turn advice alone into action.**

**III. Making a Difference: Using Client Satisfaction Surveys to identify barriers to effective delivery of services and to improve outcomes for clients: Cynthia Elliott, ABLE**

**A. Overview of Legal Aid Line of Western Ohio**

- 1. Joint project of two legal programs:
  - a. Advocates for Basic Legal Equality, non-LSC restricted.
  - b. Legal Aid of Western Ohio, LSC restricted.
- 2. Expansive 32 county geographic area
  - a. Eight office locations
  - b. Two independent pro bono programs
  - c. Internal rural pro bono unit
- 3. Three-fold mission
  - a. Intake
  - b. Advice
  - c. Referral
- 4. Origin of intake applications
  - a. Telephone
  - b. Web application
  - c. Walk-ins
  - d. Referrals
- 5. Intake process
  - a. Non-attorney intake staff screen for eligibility and gather facts

- b. Case assigned to an attorney
  - i. Emergency and priority cases
    - a. Referral to Legal Aid Line attorney
    - b. Immediate call back or response within 24 hrs
    - c. Telephone advice and follow up advice letter
    - d. Referral within legal services program
    - e. Represents 60% of eligible applicants
  - ii. Non-emergency and non-priority cases
    - a. Case note analysis only
    - b. Advice letter only
    - c. Pro se packet
    - d. Referral to outside legal services program
    - e. Represents 40% of eligible applicants

## **B. Measuring client satisfaction**

1. Ongoing client satisfaction survey
  - a. Broad measure of program effectiveness
  - b. Survey sent to every 10th caller
  - c. First hand and meaningful feedback of client need
    - i. Dissatisfied caller's response is most instructive
    - ii. Open ended question as catch-all
  - d. Response overwhelmingly positive
  - e. Analysis of survey questions reveals factors that create barriers to effective delivery of services
    - i. Types of cases
    - ii. Complexity of issue
    - iii. Type of service provided
      - a. Advice letter only
      - b. Telephone advice
      - c. Need for interpreter
      - d. Multiple problems
2. Client grievance process
  - a. Identifies individual problems
  - b. Identifies systemic issues
  - c. Indiscriminate
  - d. Unrepresentative
3. Targeted follow up surveys
  - a. More focused
  - b. Goal to measure effectiveness of advice
  - c. Designed to identify problem areas
  - d. Goal to promote continuous improvement

## **C. Proposed solutions to improve outcomes based upon client feedback**

1. Form a unit to assist with brief services
2. Explore pro se assistance options
  - a. Recruit law students
  - b. Private bar involvement
  - c. Community collaboration

3. More proactive assessment at initial call
  - a. Look for indications of client incapacity
  - b. Consider complexity of issue
  - c. Flag potential problems
4. Reevaluate intake process
5. Reconsider case acceptance criteria

#### **D. Conclusion**

**III. Incorporating the following ABA Standards in the development of a policy to assess the effectiveness of legal advice given to clients after their initial call: Using Outcome Survey cards to evaluate whether offering counsel and advice on a large scale will be beneficial to the client community it serves.**

**Thomas Trent, South Carolina Legal Services**

#### **A. A Look at the ABA Standards**

Discussion of how ABA Standard 2.6, 3.4, 3.4-1 led to the birth of the SCLS Quarterly Advice Follow-up Procedure

#### **B. Overview of the SCLS Quarterly Advice Follow-up Procedure**

Quarterly Advice Follow-up Letter and the Outcome Survey Card

#### **C. Evaluating the Follow-up**

Is there a need to:

1. change the way counsel and advice is given;
2. offer a higher level of limited representation;
3. offer full representation to some or all clients in a given substantive area; and/or,
4. take a look at whether it is a prudent use of resources to continue giving counsel and advice in the same manner.

**Notes:**

**Bibliography & Website Links:** Legal Hotline Clients Outcome Study 2006,

[www.legalhotlines.org](http://www.legalhotlines.org)