ABA/ NLADA 2007 Equal Justice Conference

WSR_45 Starting a Telephone-based Delivery System:
Choosing a Model, Funding, and Integrating into the Legal Services System

Presenters:
Ellie Crosby Lanier, Project Attorney, AARP Foundation, eclanier@aarp.org
Claudia C. Johnson, Managing Attorney, Bay Area Legal Aid, CJohnson@baylegal.org
Erin K. McBride, Managing Attorney, Wisconsin Judicare, Inc., emcbride@judicare.org
Cheryl Nolan, Directing Attorney, Legal Aid Foundation of Los Angeles, CNolan@lafla.org
Cynthia Elliott, Managing Attorney, Advocates for Basic Legal Equality, celliott@ablelaw.org
Benjamin Garcia, Managing Attorney, Puerto Rico Legal Services, bgarcia@servicioslegales.org

Brief Description:
High quality legal services are fostered through coordinated, telephone-based delivery systems, such as centralized intake and hotlines. Before programs can capitalize on such systems, they must understand the key components of implementation. This session will help programs address the issues surrounding start-up, implementation and advanced growth for small and large organizations. The session will focus on vision/goal setting, fundraising and budgets, developmental approaches, managing change. Other topics include ongoing project management, staffing, training, and expansion.

Topical Outline:

I. **Planning for Success**: Debunking Myths, Developing a Shared Vision and Service Integration
   a. Debunking Myths and Overcoming Resistance
      i. Hotline is not a "new service," just a new way to deliver services already being provided
      ii. Hotline quality relates to quality of management, supervision and staff
      iii. Perceived Pluses and Minuses of Hotlines
   b. Importance of Baseline Measurement
      i. Snapshot of pluses and minuses of current system
      ii. Determining areas of unmet need
   c. Developing a Shared Vision
      i. Scope of Services provided
      ii. Identifying your "constituents"
         1. Service to clients
         2. Service to partners within program
         3. Service to private bar/pro bono community
         4. Service to partners who serve your target population
   d. A Work in Progress/Making Adjustments
      i. How to tell if you are making a positive difference

ii. Feedback from clients
iii. Feedback from internal partners
iv. Feedback from external partners
v. Feedback from other sources

e. The Experiences of Puerto Rico Legal Services

II. **Tracking and Identifying Emerging Trends** –"There's Gold in a Database!"

a. Overview of Bay Area Legal Services and Legal Aid of Western Ohio

b. Use data to target resources and create cross collaboration
   i. Find Patterns
   ii. Domestic Violence story
   iii. Build more credibility for funders
   iv. Practice systemic advocacy

c. Use technology to expand capacity
   i. Aggregate data to spot emerging trends
   ii. Strategic position of centralized intake

d. Don't forget the nuggets
   i. Clients' stories
      1. Utility shutoffs
      2. Evictions
      3. Rent to own scams

e. Mining for Gold
   i. Breaking down the numbers
   ii. Identify repeat offenders
   iii. Homelessness data chart
      1. Debunk myths
      2. Confirm suspicions

f. Other systemic uses for data
   i. Plan for class actions
   ii. Preventative advocacy
   iii. Educational campaigns

g. Conclusions and questions and answers

III. Managing Change

a. Best Practices and Implementation
   i. Technology:
      1. Developing a Helpline Website
      2. Distributing a monthly electronic newsletter to staff and stakeholders, reporting changes, trends, statistics, and themes to encourage innovation and efficiency.
   ii. Procedure: Creating a "Helpline Procedural Guide"
      1. A guide detailing customary practices creates consistency among Helpline staff, explains to staff and clients how you operate, and defines your goals and your clients' goals.
      2. A comprehensive manual of operational procedures is available on the Judicare website, at http://www.judicare.org/helpline.html.

iii. Utilizing Screening Scripts, Checklists, and Flowcharts
    1. Each caller to the Helpline is screened first for eligibility and next for legal issue. A paralegal utilizes substantive screening scripts for this process. These scripts and all relevant checklists and substantive law flow-charts are available on the office server and on the Judicare website to provide convenient access.
    2. Sample scripts are available to conference participants.

iv. Client Satisfaction and Effectiveness of Advice
    1. Client Feedback Survey
        a. Were clients pleased with the service and treatment on the hotline?
        b. Do clients feel they learned the next steps to resolve their legal issue?
        c. Would clients refer friends to the hotline or use it in the future?
        d. What suggestions do clients have to improve the service?
    2. Measuring Effectiveness of Advice Through Court Records Searches
        a. Are clients able to understand and follow the advice you give?
        b. Do clients yield a positive result in court as a result of your advice?
        c. Are clients committed to the advice / motivated to take the next steps you recommend?
    3. Staff Feedback Survey
        a. Is staff aware of and supportive of the hotline?
        b. Do key players have recommendations for improving the process?

b. Sustainability and Expansion:
    i. Advertising and Marketing the Hotline
    ii. Implementing an Emergency Plan
    iii. Forming collaborations and key partnerships in the service area

IV. **Top Ten Tips**-Quick, Easy, Cost-Free Things an Agency Can do to Start a Hotline
    a. Discussion of Next Steps
    b. Resources and Handouts

Website Links:

1. Legal Services National Technology Assistance Project (NTAP)—for Hotlines and Intake: http://www.lsntap.org/lilbookshelf?tid=50&name=Hotlines%20and%20Intake
2. Legal Aid Foundation of Los Angeles: http://www.lafla.org
3. Wisconsin Judicare, Inc.: http://www.judicare.org/helpline.html
4. AARP Foundation: http://www.legalhotlines.org/
5. Bay Area Legal Aid: http://www.baylegal.org/
6. Advocates for Basic Legal Equality: http://www.lawolaw.org/
7. Servicios Legales de Puerto Rico, Inc: http://www.slpr.org/