

**Directions for completing this form:** Place the title of your workshop in the space indicated, followed by the name and contact information for each of the presenters. Provide a brief description of your workshop by placing the cursor on the line below "Brief Description" and commence typing. To complete the "Topical Outline", place cursor next to each Roman numeral and begin typing. Then place the cursor next to the "a." to begin listing sub-topics. To list more than one sub-topic, push "Enter" and "b." should appear on the next line, and so on. Place the cursor on the line under "Notes" to begin providing your notes. To list bibliographic information, place the cursor next to "1." and start typing. Push "Enter" to move on to "2." and etc.

ABA / NLADA 2009 Equal Justice Conference

**Integrating a Legal Hotline Into the Legal Services Delivery System  
WSR 029**

**David Godfrey- Senior Attorney  
ABA Commission on Law and Aging  
740 15<sup>th</sup> Street NW  
Washington, DC 20005  
[godfreyd@staff.abanet.org](mailto:godfreyd@staff.abanet.org)**

**Mary Haberland, Project Director  
Florida Senior Legal Helpline  
Bay Area Legal Services, Inc.  
829 W. Dr. Martin Luther King Jr. Blvd., #200  
Tampa, FL 33603  
[mhaberland@bals.org](mailto:mhaberland@bals.org)**

**John Simpson, Manager, Community Services  
Legal Services Society  
Vancouver, BC  
[John.Simpson@lss.bc.ca](mailto:John.Simpson@lss.bc.ca)**

**Brief Description:** A legal hotline is one piece of the legal services delivery puzzle. In order to provide optimal service, a hotline screener must be able to recognize the legal issue and refer the caller to the most appropriate service, whether that is advice or limited service from a hotline advocate, intake for legal aid representation, access to online or print information, or referral to another organization. The need to optimize intake, level of service, and referrals present interesting challenges in terms of procedures and technology. The training will cover the role of the gatekeeper in screening, classifying, assigning or referring the case, training gatekeepers on issue spotting including urgent or systemic issues and techniques for matching the client with the best level of legal services available.

## Topical Outline:

- I. Integrated Legal Service Delivery Model
  - A. No wrong door – the role of intake and referral specialists
    - 1) Single point of entry concept
    - 2) Multiple providers
    - 3) The caller is always right
    - 4) Increasing the completion rate on referrals
    - 5) Formal and informal networks
  - B. Emergence of Aging and Disability Resource Center model
    - 1) What is an ADRC?
    - 2) How does legal assistance fit into the ADRC model?
    - 3) Cause vs. symptoms
  - C. Who are the players in legal service delivery?
    - 1) Thinking outside the box
    - 2) Non-traditional providers
    - 3) Legal information v. legal assistance
    - 4) Networking
  - D. Legal Hotlines as Gatekeepers – the role of the intake and referral specialist
    - 1) Who is a gatekeeper?
    - 2) Who has a gatekeeper?
    - 3) What do they do?
    - 4) How do they help those who need more?
      - a. differing models
      - b. common thread is connection to extended service capacity
    - 5) Recruiting, training, retaining talent
- II. Best use of limited resources in times of restraint
  - A. LawLINE - the telephone triage project
  - B. Creating single point of entry – integrating services
  - C. Streaming callers efficiently with automated greetings
  - D. Stage 1 - screening through intake legal assistants
  - E. Stage 2 - diversion to legal information outreach workers
  - F. Stage 3 – escalation to paralegals/lawyers
  - G. Maintaining service with reduced resources
  - H. Staffing levels - lawyers and paralegals
  - I. Priorities for coverage in the current economy
  - J. Legal information vs. advice and representation
- III. Coordination and collaboration among providers
  - A. The Florida Model Approaches experience
    - 1) Project objectives
      - a. Enhance and improve referrals between partners
      - b. Establishing uniform standards and reporting
  - B. Overview of helpline programs at Bay Area Legal Services
    - 1) Differences based upon populations served, funding
    - 2) Separate matrices developed with different program partners

- C. Florida Senior Legal Helpline
  - 1) Geographic region and current partners
  - 2) Establishing referral criteria
  - 3) Examples of partner instructions
- D. Strengthening partnerships
  - 1) Training and promotion
  - 2) Sharing resource materials
  - 3) Identifying common legal issues
  - 4) Tracking outcomes
- E. Statewide Planning
  - 1) Separate meetings with directors of AAAs, IIIBs
  - 2) Developing appropriate cross-trainings
  - 3) Identifying and focusing services on vulnerable Seniors
  - 4) Raising the level of IIIB funding to a statewide minimum
  - 5) Measuring the success of referrals made
- F. Comparative program data for 2007, 2008

**Notes:**

**Bibliography & Website Links:**

1. “Legal Issue Spotting for Information and Referral Specialists”  
David Godfrey, Senior Attorney. (PowerPoint presentation)
2. Sample Referral Matrix – Florida Senior Legal Helpline  
Mary Haberland, Project Director
3. [www.legalhotlines.org](http://www.legalhotlines.org)