

**What to Do When You Don't Have Enough - Part I: Setting Limits and Saying No (The Policy Piece)**

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- I. Never Enough (or, the reality of scarce resources)
  - A. The demands on and limitations of hotlines (or, making the most of what you've got):  
The hotline concept is premised on answering, triaging, and efficiently processing all calls such that each need presented receives the most appropriate level of service. However, hotlines rarely (if ever) have sufficient resources to uniformly realize those goals. The question is thus, "How do we do what we are charged with doing, and do it well, with chronically insufficient resources?" .....**Cheryl Nolan**
  - B. A Constant Tension.... Access Vs. Services.....**Kari Deming**
    - (1) Achieving BOTH Volume and Quality
    - (2) Advice vs. Extended Services
- II. Strategic priority setting.....**Kari Deming and Martin Ostensen**
  - A. Defining the mission
    - (1) Something for everyone?
    - (2) Quick questions or holistic assessment?
    - (3) Referrals, information, advice, brief services or more?
  - B. Balancing maximum call volume and meaningful service
    - (1) Eliminating service categories
      - a. Lack of priority
      - b. Poor hotline fit
    - (2) Establishing service guidelines
    - (3) Assessing capacity
- III. The Art and Science of Saying No.....**Martin Ostensen and Eve Ricaurte**
  - A. Acceptance
  - B. Saying No Before Hello (community education, outreach, introductory greetings)
  - C. Saying No in Two Minutes or Less (eligibility and triage)

- D. Saying No By Call's End (call and client management)
  - (1) Fingertip knowledge (priorities, referral sources)
  - (2) Service level limits
  
- E. Saying No – Period
  - (1) Frequent fliers (with or without capacity)
  - (2) Hanging up
  - (3) Banning future help

**What to Do When You Don't Have Enough - Part II: Maximizing Scarce Resources (The Technology Piece)**

**Norm Wheeler, Kari Deming, Cheryl Nolan**

- I. Never Enough (or, the reality of scarce resources)
  
- II. Using Technology to Maximize Access
  - A. State Wide Websites.....**Norm Wheeler**
  - B. Substantively Specialized Websites (Michigan's Foreclosure Counseling and Case Intake, etc).....**Kari Deming**
  - C. Assisted Pro Se Projects (Maryland's Custody and Visitation Interview Website, etc)
  
- III. Using Technology to Maximize Efficiency Across Diverse Delivery Systems
  - A. Web-based Client Applications.....**Martin Ostensen and Eve Ricaurte**
  - B. Dial-a-Law.....**Kari Deming**
  - C. Internet Representation Projects.....**Kari Deming**
  - D. Resource Management
    - (1) Wikis.....**Kari Deming**
    - (2) Live Chat.....**Eve Ricaurte**