

# Legal Hotline Quarterly

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## **Maryland Legal Assistance Network Director Wins Equal Justice Award**

Ayn Crawley, Director of the Maryland Legal Assistance Network (MLAN) received the NLADA 2001 Innovations in Equal Justice Award at the ABA/NLADA Annual Equal Justice Conference, March 2001, in San Diego. MLAN was developed by legal services providers in Maryland to improve the delivery of legal services to indigent people in the state. The award recognizes Ayn's efforts to "integrate, expand, and coordinate the statewide delivery of legal services through technological innovations" [including legal hotlines.] *The Daily Record*, April 14th, 2000.



## **Maryland Legal Assistance Network Status Report**

*LHQ* first reported on MLAN in the Fall 1998 issue. Maryland Legal Services Corporation (MLSC), headed by Robert Rhudy, received a grant of \$1 million from the Open Society Institute to increase access to justice for all Marylanders. MLSC is the IOLTA funder for the state. It provides funds, to a greater or lesser degree, for 28 non-profit legal services organizations. Legal Aid Bureau of Maryland

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received about 40% of these funds.. The MLAN grant period began in September 1998 and runs through September 2001. The grant was used to establish the Maryland Legal Assistance Network (MLAN). Ayn Crawley, this year's Innovations in Equal Justice Award Winner for her work over the last 20 years in legal services, came to MLAN as a Consultant in January of 1999 and became MLAN Director in May 1999.

MLAN's overall goal, as Ayn describes it, is to "develop the processes and tools for collaboration among the numerous Maryland legal services providers and to develop working models of those tools". From the start, the goal for the use of the OSI grant funds has been to provide the "start-up funds" for certain key initiatives and to develop those activities with partner provider organizations with commitments to integrate the activity (to a greater or lesser extent) into the partner's own ongoing funding and planning. Rather than the creation of a stand alone project, the MLAN project has been an effort to operationalize the following approaches to the work products under the grant:

- To encourage and enhance collaboration among the state's 28 legal services providers;
- To leverage and build upon existing resource (both human and financial);
- To develop the structure for a multi-organizational knowledge management process to quantify and consolidate the expertise in the state; and
- To develop additional resources through joint funding proposals with existing providers in areas of need related to the MLAN project mission.

The essence of the MLAN project has been to encourage collaboration among the legal services providers in the state as a necessary foundation for the implementation of the four grant areas of focus.

- (1) Developing a **centralized intake system** that would link the efforts of the 28 legal service providers;
- (2) Expansion and re-orientation of content of the People's Law Library website, a **public access legal information website**;

- (3) Creation of a **Pro Se/Unbundled Legal Services Project** to (a) support, evaluate and expand the activities in the state that assist *pro se* litigants and (b) explore ways to facilitate the expansion of unbundled legal services;
- (4) Creation of an **Internet-based legal support and communications system** for legal services and private attorneys.

MLAN has made substantial progress in implementing these components and will complete (with the exception of the centralized intake pilot and roll out) the work funded under the initial grant by September of this year. As was intended, the grant has focused on the development of the infrastructure, tools, and a process to support the 28 legal services organizations in the state. The grant funds will have set the foundation for cross-program state support in these critical areas of the delivery system and will provide the springboard for continued activities under other funding. Additional funding for some activities in the upcoming year (July 2001 – June 2002) has been received from the Maryland courts.

An update on the development of the four components is described below:

### (1) Statewide telephone hotline

Shortly after Ayn assumed directorship of MLAN, it became apparent that the initial plan to create a statewide telephone hotline accessible to anyone, regardless of income, was not feasible. A primary concern among existing legal services providers was that state resources would be diverted to middle class, rather than lower income, callers at a time when many low income persons were underserved. The MLAN Oversight Committee, chaired by the Chief Judge of the state, agreed almost immediately that the hotline should serve low and moderate-income callers, pursuant to the MLSC guidelines. In Maryland, IOLTA funds may be used to serve clients whose income does not exceed 50% of the State's median income, which is a considerably more generous standard than the poverty level guidelines in use in many states.

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The initial MLAN plan and budget described a stand-alone “ ‘hotline’ intake, information, brief service and referral system to be provided in central Maryland in year one and throughout Maryland in year two.”

The initial plan envisioned a new hotline with costs shared by another organization that would operate during the first two years of the grant with a third year spent in the evaluation process. Based upon further analysis of the needs in the state and a series of meetings with the legal services providers, it became apparent that a transformed model would best serve the long-term needs of the state. A variety of factors lead to this evolution. Chief among the factors were the budgetary concerns in creating another intake entity in a state with 28 providers as well as a concern about a funder in possible competition with its grantees for scarce direct service funds.

MLAN took a step back to develop a six-month statewide open planning process to address these concerns and others and to design a new approach to a coordinated hotline that would build upon the existing resources of the state. One key fact that emerged was that five of the state’s programs handled 77% of the cases in the state. It seemed clear that a good compromise on the statewide hotline would be to link those five programs into a statewide hotline operation using existing staff as a “distributed” hotline rather than creating a new hotline entity. Criteria for inclusion in this project required that the program already have a statewide telephone advice component, handle a high volume of calls, and provide advice in areas of major need. All of these five programs already provided statewide services and had a telephone advice component in place.

Maryland Legal Aid Bureau, Inc. (LAB), a primary participant in the hotline project, is the largest program in the state with 13 branch offices. The Baltimore office has had a functioning local area intake and advice hotline since early 1999. This program also launched a statewide senior legal hotline in Spring 2000 with funds from Title IV of the Older Americans Act. As part of the MLAN design process, a gap in service to seniors was identified. MLAN and LAB entered into a joint venture to sub-

mit a successful proposal to the Administration on Aging for the senior hotline to be established at the Legal Aid Bureau.

The Women’s Law Center is the second participant in the hotline project. It runs the statewide Family Law Hotline that is staffed by *pro bono* attorneys on Tuesdays and Thursdays. Family law is the largest area of client need in the state and expansion of existing hotline resources was the second major gap identified in the MLAN design process. Beginning in January, 2001, WLC entered into an agreement with LAB whereby LAB would provide attorneys to staff the Family Law Line on Monday, Wednesday, and Friday, thereby greatly expanding the number of clients served by the Family Law Hotline and increasing the accessibility of services throughout the work week. The project is co-managed by a team from the two organizations and MLAN and the funding for the expansion was provided by the Maryland Legal Services Corporation. (For a detailed description on how the Family Law Hotline now works please see the article on the Maryland Legal Aid Bureau page 7).

Thus far, progress on the hotline component of the MLAN Project includes the expansion of services in the areas noted above and the development of a multi-organization design for this “distributed model” in which each organization provides its own oversight and staffing for a shared limited initial client contact system. There are three other organizations involved in the coordinated hotline component of the system. These include House of Ruth, which provides domestic violence assistance, Baltimore Neighborhoods, Inc. (BNI) which is a statewide landlord/tenant telephone advice service only, and Maryland Volunteer Lawyers, which would serve as a conflict-referral and overflow resource.

Each program would provide staffing for the hotline. For each call, the hotline would provide telephone advice, create an intake file for their own programs where appropriate, or refer callers to one of the other 28 programs if possible. The plan calls for the participating programs to share an eligibility database and substantive law database. All 28 programs would be able to view the program eligibility criteria and substantive law but only the five participating programs would share the client contact information

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database where the basic non-identifiable client information was stored. Each program would keep separate their own case management system for clients for whom they had completed intake for other units in their own programs.

The expansion of the joint statewide system is dependent upon phone and Internet connectivity technology. After a nearly a year of issuing an RFP and engaging in a vetting process for purchase of a telephone system, contacting software development, and establishment of a wide area network, the group decided that the project would be better served by outsourcing the call-routing, ACD and shared intake management software (as opposed to case management software, where each program will keep the software they are using). After MLAN investigated the possibility of purchasing these systems, the decision was jointly made with the hotline participants to pursue outsourcing of these systems. The Project is close to signing a contract for the provision of the phone services and software for a nine-month pilot to implement the systems. With permission from OSI, funds from the grant have been set aside to pay for a multi-year outsourcing contract at the conclusion of the pilot if that appears to be the best route.

Ninety days after signing the outsourcing contract, the hotline participants will begin to take calls on a new 800 number that they will share. They will also share intake protocols. However, each program will retain their own number as well and calls made to those intake numbers will be pass through the system automatically to be counted before being routed to the organization whose number was called. When a person calls the 800 number they will self-select from a menu of five options: landlord/tenant (these calls will go to BNI); domestic violence (these calls will go to House of Ruth); over-60, (these calls will go to the Maryland Senior Legal Hotline at LAB); Family Law (these calls will go to the Family Law Hotline) and other matters (the Legal Aid Bureau's general hotline) The caller will make the 1<sup>st</sup> selection and the staff handling the call can route the person to the proper program as needed.

## (2) People's Law Library

This element of the OSI-funded part of the MLAN Project is substantially complete and will be demonstrated at the June 2001 statewide legal services conference. The People's Law Library (PLL) was designed to provide practical legal information for the low and moderate income public. Development of content under the MLAN grant for the Peoples Law Library was targeted on those areas of critical importance to the public where demand for free legal services was so high that it could never be fully met by the providers in the state. The goal of the MLAN –sponsored expansion is to help to support the outreach work of the legal services providers and the legal hotlines. MLAN provides the structure and the tools for the upgrading and expansion of the People's Law Library but the content belongs to the individuals, programs and task forces that provide the material. In some instances, the MLAN project has created materials to support statewide initiatives such as the development of a self-diagnostic tool model. The "distributed ownership" concept of the Library requires each program to accept ownership of a substantive portion of the library and keep the library supplied with materials and updates.

MLAN has (in conjunction with multiple providers) completely updated, expanded and enhanced the website in the following areas:

- *Landlord tenant law* – sponsored by the Baltimore Neighborhoods, Inc. program (which also operates the statewide LL/T hotline)
- *Domestic violence* including the first on-line comprehensive statewide listing of services and shelters (substantial material provided by the legal clinic of House of Ruth - a domestic violence shelter and other DV providers in the state)
- *Divorce and related issues* including the development of model holistic, client – centered legal content with a self-diagnostic tool in the divorce area, which we believe will serve as the template for the creation of similar tools in other content areas.
- *Public benefits* (expansion based upon a

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- work product of the Homeless Persons Representation Project with research and expansion by the MLAN project)
- *Elder law* (created in conjunction with the Senior Legal Hotline through the efforts of the project manager for the LAB Hotline)
- All areas of the website were reviewed for general updating of content and technology.

As a part of the effort to bring all of the key players in the justice system, MLAN has worked closely with the courts on several parts of the project, including the PLL website. The Administrative Office of Courts (AoC) has developed forms and instructions based on the kind of case the client has. These are easy for the public to use because they are searchable with common words, rather than legal terms. The AoC has also agreed to develop a user-friendly interface to promote client access to these materials. These are due to be published in the next month and the AoC and PLL websites will be cross-linked. Supportive material from the court on the PLL website includes the findings of a survey of the court clerks and the Family Court Coordinators on Common Mistakes by *Pro Se* Litigants.

Diagnostic tools to evaluate the feasibility of a particular client proceeding *pro se* in domestic matters will be an innovative feature of the People's Law Library. It is not ready for public use yet but a dummy version of the tools can be viewed at <http://www.peoples-law.com/peoples/flc/flc2.htm> under the "Representing Yourself in Divorce" link.

Visit the PLL at [www.peoples-law.com](http://www.peoples-law.com).

### 3. *Pro Se*/Unbundled Services component

This element of the OSI-funded part of the MLAN Project is substantially complete. When MLAN first convened a meeting on *pro se* delivery in 1999, one of the most striking comments was that many of the assisted *pro se* projects listed "knowing what others were doing" as a major need in developing the system. A primary focus of this aspect of the MLAN project was to compile information and to provide forums to coordinate the efforts of the

existing programs. The vast majority of the *pro se* programs in the state are funded through the AoC or through the local courts. Most of the programs handle family law. Some require income screening while others do not. Almost all jurisdictions have some form of *pro se* assistance housed in or near the courthouse. Some are run by non-profit providers while others are private attorneys under contract with the court. Generally they are staffed by attorneys and provide help by giving the client the proper forms, helping them fill them out, explaining the procedure and giving the client other information or answers to their questions.

So far MLAN has created extensive profiles of each of the *pro se* programs in the state. Databases for both public search and internal provider use are underway and due to be completed by August 2001. MLAN convened a well-attended statewide meeting to create a shared work plan on development of the assisted *pro se* programs in the state in January of 2001. Nearly 15 next steps and needs were identified and work has begun on most of the items.

One of the next steps will be to determine best practices for *pro se* programs. MLAN has engaged the University of Baltimore Law School's Center for Family, Children and the Courts to review the programs and make recommendations. Another next step, well underway is for the *pro se* programs to use PLL to complement and supplement their work through the diagnostic tools on suitability for *pro se*, forms, and a list of attorneys who have agreed to perform unbundled services. MLAN will also set up a *pro se* listserv to share pleadings, tips, and general information. Since this element of the Project started with providers working in such a solitary fashion, building a sense of community among the Maryland *pro se* programs is an overarching goal of this component.

In order for *pro se* clients to be better served, MLAN identified the need for lawyers to provide assistance for particular legal tasks as clients' cases proceeded. MLAN worked with 11 national and state organizations (including the Legal Services Corporation and NLADA) to convene the first national conference on "unbundled legal services" a/

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ka discrete task representation. The conference was held in Baltimore in October 2000 and was attended by over 225 people from 34 states, the District of Columbia Canada and Russia. Recommendations from the conference have been disseminated nationally and are available on the conference website (which is being maintained).

Visit [www.unbundledlaw.org](http://www.unbundledlaw.org).

Ayn notices a gradual shift in attitude from the Bench and Bar toward more acceptance of the practice. The goal of this element of MLAN is to

(1) gain acceptance of the use of “unbundled” legal services as part of, but not a replacement for, a full delivery system (including full case presentation, hotlines, assisted *pro se*, etc.) (2) identify those aspects of the legal system where unbundled legal services are being practiced in Maryland and (3) develop a panel of attorneys willing to support *pro se* services by representing clients for discrete legal tasks.

#### 4. MDJustice Website

This element of the OSI-funded part of the MLAN Project is substantially complete. This component of MLAN is a website which supports advocates rather than the public. It went up last year but has since been completely redesigned and will be relaunched at the end of June, 2001. The website contains a series of provider directories, a community calendar, and Resource Centers on various legal topics. Each Resource Center also contains virtual law libraries where any attorney can upload their materials, such as forms or pleadings, with attribution. The forum is a “distributed site” that is, one whose component parts are managed by disparate organizations or task forces. For example, the Consumer Law Task Force located at the Legal Aid Bureau sponsors the Consumer Law Resource Center. In some instance (such as *Pro Se* and Management) MLAN has taken the lead in developing the Center. Under the OSI grant, MLAN will have completed the development and sponsorship of five resource centers, eight directories and a technology support center by the end of June. Resource Centers

will be open in the areas of :

- Consumer,
- Housing,
- *Pro se*,
- Multi-lingual Access, and
- Management support.

#### *Future Plans*

OSI funding ends in September 2001. Money for the telephone/intake software technology has already been put aside from OSI funds. The Courts have funded MLAN through July 2002. MLAN hopes to permanently continue in its role of building bridges for collaboration. Maryland has few other formal mechanisms for providing this type of leadership and support, which is so necessary for continuing to improve delivery for clients and assistance for advocates.

If it sounds like MLAN has been trying to create a new world all at once, Ayn Crawley agrees, but believes this has both a negative and positive side. Of course, the pace of work required to try to develop all the MLAN components simultaneously is intense. On the positive side, since everything is going forward together, the participants have the opportunity to develop each component in a way that supports and complements the others.

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Maryland Legal Aid Bureau:  
A Hotline Assortment



The Maryland Legal Aid Bureau (LAB) opened in 1911 to serve the legal needs of low-income Marylanders. It is Maryland's only statewide legal services program that handles a wide range of case types and services. Over the course of the last two years, it has customized the legal hotline model to serve the advice and intake functions for various populations and projects.

### *History and Organization*

LAB has 13 offices. The downtown Baltimore central office houses the main administration for the other offices. Ten of the offices have various substantive law ("specialty") units including Domestic Law, Administrative Law (Public Benefits), Housing and Consumer Law. A Nursing Home Program, Assisted Living Project and Farm Worker Project are housed at one of the 12 satellite offices. Another of the satellite offices is focused on community development and does not routinely handle client cases.

Wilhelm Joseph is the Executive Director of LAB, Rhonda Lipkin is the Deputy Director, and Hannah Lieberman is the Director of Advocacy. Luther Blackiston is the Project Manager for the Hotline unit. LAB started utilizing the hotline model as intake for the Baltimore City office in January 1999. In March 1999, William (Pete) Stokes came on board as a part-time hotline attorney and later became Supervising Attorney for all the hotlines in service at LAB. The hotline staff attorneys handle all the calls (with the exception of some calls for the Family Law Hotline and Sixty Plus Legal Program), no matter which hotline receives the call.

### *The LAB Hotlines*

#### **1. Baltimore City Central Office Intake Hotline**



At LAB all the offices continue to do their own intake in whatever fashion they have developed. The Central Office conducts intake for Baltimore City residents, and the Towson LAB office handles intake for Baltimore County. The Baltimore City Intake Hotline began in January 1999, and is funded mainly with federal and state Legal Services Corporation (LSC) LAB operating funds. All calls coming in to this office are answered by the switchboard operator, who transfers any caller who does not ask to speak to a specific person or office to the hotline attorneys. The hotline attorney determines basic client income eligibility, and if the client is over-income, gives the client general information and perhaps a referral number. A "case" is not opened as such, and the entry is recorded and closed in the database. Income eligible callers living out of the Baltimore City service area are given the number of their local LAB office to call.

If the caller is a Baltimore City resident, the attorney performs a conflicts check, provides legal advice, and inputs the client demographics and casenotes into the computer. The case may be closed at that point, if brief advice or a referral fully addresses the client's issue(s). However, if the hotline attorney determines that the client needs further assistance that fits the LAB priorities, a detailed intake sheet is completed, printed, and sent to the appropriate LAB specialty unit. That unit will then contact the client. If the matter needs urgent attention, the hotline attorney may consult with a specialty unit attorney for a quick fix, and/or advise the client to come into LAB walk-in intake which is held Monday, Wednesday, and Friday from 8:30 a.m. to 3 p.m. At that time the receptionist will locate the client's

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file in the database and immediately contact the appropriate LAB specialty unit, thereby avoiding nearly all preliminary LAB intake procedures.

The other hotlines that LAB operates have statewide application.

## 2. Maryland Senior Legal Hotline



The hotline for Maryland's 780,000 seniors 60 and over began in March 2000 with start-up funds from Title IV of the Administration on Aging. The hotline was developed as a joint venture between the Legal Aid Bureau and the statewide support effort, the Maryland Legal Assistance Network (MLAN) project. As a result of the MLAN efforts to coordinate the intake among the various hotlines operated by several legal services providers in the state, a gap in hotline services targeted at seniors was identified and led to the successful application for funding of the LAB's Senior Hotline. The proposal to AoA was a collaborative effort between co-authors Ayn Crawley of the MLAN project and Luther Blackiston, the LAB Law and Technology Coordinator. Area Agency on Aging IIIB funds also contribute to hotline operation.

Calls from seniors statewide are routed to the hotline attorneys who check for conflicts, open a case file, and provide legal advice and referrals if needed. The hotline attorneys also send clients brochures and form letters but do not provide brief services such as making phone calls to agencies or third parties, mainly because of volume. Except for Baltimore County seniors, the Maryland Senior Legal Hotline does not perform centralized intake for the other IIIB offices in the state. The offices may collaborate with the hotline to the extent they find convenient.

Pete sits on the State Elder Law Task Force and has used that group as a vehicle to coordinate services between the hotline and the IIIB offices. Some offices will route all calls first to the statewide

senior hotline for advice, while others elect to handle all client calls themselves. However, any senior that calls the Maryland Senior Legal Hotline number directly will receive telephone legal services and, if needed, a referral to a legal services office, other appropriate agency or office, or lawyer referral service.

The continued development of the Senior Hotline, including the development of a Maryland Senior Hotline outcomes assessment survey and testing the Senior Hotline procedures as a model for expanding the centralized intake approach among other the LAB offices, is a joint effort involving Pete, Luther, and Ayn.

To support the work of the Senior Hotline, an elder law section to the public access website the People's Law Library has been created. The Peoples Law Library ([www.peoples-law.com](http://www.peoples-law.com)) is the shared outreach tool for the state's legal services provider community. The goal is to assist seniors and their families with increased access to legal information.

## 3. Family Law Hotline



As a result of LAB's partnership with the Women's Law Center (WLC), the statewide Family Law Hotline that WLC had been operating was expanded on January 8<sup>th</sup>, 2001. Funding for the expansion came from the Maryland LSC through the Maryland Legal Assistance Network. Prior to the partnership, the Family Law Hotline operated only on Tuesday and Thursday, 9:30-4:30 as a *pro bono* project, and calls coming into the Family Law Hotline 800 number were transferred to private attorneys in their homes and offices. With the participation of LAB, the Family Law Hotline now operates five days per week.

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LAB's role in the expanded Family Law hotline is manifested in two ways. On Monday, Wednesday, and Friday, calls coming into the Family Law Hotline 800 number are forwarded to a dedicated phone line in the Baltimore City LAB Domestic Law Unit (DLU), located on another floor. These calls are fielded either by a DLU attorney or by a hotline attorney with extensive experience in family law. Secondly, the other LAB hotline attorneys now advise callers with family law questions who were previously referred to the WLC Family Law Hotline. That is, prior to the partnership agreement, certain under 60 callers would have been told to call the Family Law Hotline number, which only accepted calls on Tuesdays and Thursdays. Now the LAB hotline attorneys will provide full Family Law Hotline advice to any caller needing it.

The LAB offices do not as yet share a database with each other or with WLC. In the meantime, LAB collects client data from its other offices and consolidates the data bimonthly into a centralized database. The LAB DLU or hotline attorney first checks this database for conflicts, and then calls the client's local service area LAB office, as necessary, to make sure that there is no conflict.

WLC provides an updated Family Law Manual which includes substantive legal summaries, sample questions and answers, and extensive statewide referral information so that the attorneys staffing the Family Law Hotline, whether *pro bono* or LAB attorneys, are well-equipped to answer these questions. As part of the MLAN initiative, the manual will be converted to an on-line resource to be available to all providers statewide.

To support the work of the Family Law Hotline, the family law section to the public access website the People's Law Library ([www.peoples-law.com](http://www.peoples-law.com)) used for provider community outreach) has been substantially overhauled and innovative new self-diagnostic tools has been created. This section of the website is due to be published in late June, 2001.

#### 4. Sixty Plus Legal Program



The Maryland Senior Legal Hotline is a natural partner to work with the Maryland State Bar Association's Elder Law section to screen, advise and refer over-60 callers with needs matching the Sixty Plus Legal Program. Up until last year, the Maryland Volunteer Lawyers Service (MVLS) had been running this long-time lawyer referral program for most of Maryland. The program matches clients needing simple wills, powers of attorney, advance health care directives and living wills, small estate administration, or simple deed changes to a panel of attorneys who agreed to provide the services at drastically reduced rates. Documents are prepared for \$25 each or \$35 for a pair for a married couple. Small estate representation costs only \$25 per hour not to exceed \$500. In order to qualify, the senior client must have an annual income of not more than \$19,000 (or not more than \$25,000 for a couple), and assets not exceeding \$20,000 (or \$40,000 for a couple). The home, car (or two cars for a couple), and personal property are not counted. The referral service is promoted via brochures to senior centers and through the Maryland State Bar Association.

Beginning in November 2000, the Maryland Senior Legal Hotline took over responsibility from the MVLS for making referrals to the lawyer referral for the elderly program for 21 counties. The lawyer referral programs for Baltimore City, Baltimore County, and Montgomery County continue to handle referrals to the Sixty-Plus Legal Program on their own. The Sixty Plus calls that come into the LAB switchboard operator are directed to Vicki Johnson, the Administrative Assistant in charge of the Maryland Senior Legal Hotline. Vicki determines the financial eligibility and matches the callers with one of 100+ attorneys statewide who are on the Sixty Plus panel. If the senior expresses a need that does not precisely fit the ones handled by Sixty Plus, or the call is complicated in any way, or if the client is financially ineligible, she will forward the call to a hotline staff attorney who will advise the client and possibly seek other referral avenues.

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## **Location and Staffing**

The Maryland Legal Aid Bureau offices occupy a five-story modern office building in downtown Baltimore. There is a large lobby waiting room on the first floor where walk-in intakes begin. The hotline unit is located on the 2<sup>nd</sup> floor in a large open room that contains workstations (desk, computer, and phone) for seven attorneys; Vicki Johnson, the Administrative Assistant; and Pete Stokes, the Supervising Attorney. A workstation shared by the MLAN staff and consultants, who work on-site periodically, is also in the same area. There are currently no partitions separating the workstations, but cubicles with modular furniture and transparent walls are being considered for purchase and installation in the near future. There is also a separate office for Luther Blackiston, the Hotline Project Manager.

Presently, there are eight hotline attorneys – five full-time and three part time – adding up to almost seven full-time equivalents. These attorneys handle all calls requiring telephone legal assistance, whether they are diagnosed as Baltimore City Intake, Maryland Senior Legal Hotline, Family Law Hotline, or Sixty Plus Legal Program calls. The attorneys handle an average of 65 calls per day, with calls on heavy volume days sometimes exceeding 100.

Pete is responsible for supervising the hotline attorneys, including planning trainings and quality control. He works on outreach and integration with other agencies in Maryland. He is not scheduled for hotline phone shifts, but will take hotline calls in an emergency, or as needed.

Luther Blackiston has been the major force in developing the program's Intranet. He has created, collected, and coordinated the inclusion of substantive and procedural materials for use by the hotline attorneys on the in-house computer database. The Intranet also has links to outside legal resources such as the Maryland People's Law Library, the MD Justice website, and Lexis, which the hotline attorneys can access as needed. Luther also works with the

MLAN project to leverage the resources of the LAB and MLAN for the benefit of other advocates in the state serving seniors and low income persons in need of legal assistance.

Ayn Crawley, the MLAN director, coordinates on a regular basis with the LAB project, particularly in the development of the People's Law Library and MDJustice websites; the development of legal research tools and resource for the advocates including access to Lexis (subsidized by the MLAN project for all the legal services providers in Maryland); and training and development for the Senior and Family Law Hotlines.

The hotline attorneys pick up phone calls as they come in and return phone calls left on voice mail. They perform the eligibility screening and conflicts check and proceed to advice, refer, or prepare an intake sheet for the appropriate LAB full-service unit. Other than mailing brochures, or an occasional form letter or other form, no brief services are performed by the hotline unit. At the present time, the hotline does not have any law students or volunteer attorneys.

The Administrative Assistant picks up calls coming into the Sixty Plus line and is responsible for making referrals statewide. She routes callers to hotline attorneys, if the issue is complicated or uncertain.

LAB also has two paralegals who have traditionally worked in the walk-in intake and performed other tasks for the full-service units. They have been trained to assist the hotline on Tuesdays and Thursdays, when they return calls left in the hotline voice mail box to callers who appear to be ineligible for LAB services – referring them to other agencies, thereby reducing the load on the hotline attorneys who will not have to call those people back. They also identify callers who need further assistance that fits the LAB priorities, and a detailed intake sheet is completed, printed, and sent to the appropriate LAB specialty unit for follow-up. After reaching the caller, if the paralegal determines that a hotline attorney should speak with the caller right away, a mass electronic "stickit" is sent and posted on the monitors of all hotline attorneys for someone to accept a transfer of the call.

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### **System Work Flow**

The Women's Law Center (WLC) Statewide Family Law Hotline (FLH) has its own 800 number which receives all FLH calls from 9:30 to 4:30 Monday through Friday. On Tuesdays and Thursdays, the calls are transferred directly to pro bono attorneys that have been trained and have agreed to take the calls at home or in their private offices. On the other three days, LAB attorneys are responsible for staffing the Family Law Hotline, and FLH calls are forwarded directly (by the same WLC switch) to a special line in a 5<sup>th</sup> floor office in the Domestic Law Unit – bypassing the LAB switchboard operator. On Mondays and Wednesdays, a hotline attorney with family law experience goes up to the 5th floor office to take FLH calls. On Fridays, the calls are handled by two attorneys from the Domestic Law Unit. If a WLC or LAB FLH attorney is already on the phone, incoming callers will receive a busy signal, and will have to call back.

LAB FLH attorneys conduct conflicts checks for callers outside of Baltimore City, by checking a consolidated LAB database which is updated bi-monthly. If no conflict is noted, the attorney will call the LAB office serving the caller's area to ensure that an adverse party has not entered the system after the database was updated. Callers needing help beyond brief advice are referred to their local LAB office, if eligible; a *pro se* program in their area, if capable of self-representation; or to *pro bono* or other lawyer referral programs.

All the other calls coming into LAB are answered by the switchboard operator and directed either to the person they are calling, to the hotline attorneys, or to the Administrative Assistant in charge of handling Sixty Plus callers. If the caller does not clearly articulate a Sixty Plus matter, the operator will route Sixty Plus calls to hotline attorneys. The switchboard operator routes all other Baltimore or senior callers directly to the hotline attorneys who pick up the calls live. There is no automated call distribution, but there are seven lines which rollover onto the unoccupied lines, so that many calls are handled live. If all the attorneys are already speaking with clients, the call rolls into voice mail. Attorneys will return those calls usually on the same day. The

Sixty Plus Legal Program operates 9-5 on Monday through Friday. The Maryland Senior Legal Hotline and the Baltimore Intake Hotline operate Monday-Friday from 9:30-4:30 with the exception of Thursday morning. The hotline doesn't open until 1 P.M. on Thursday because the hotline unit holds its weekly staff meeting and training on Thursday mornings.

### **Referrals**

Callers needing brief services or representation can be referred to their local Legal Aid Bureau offices. LAB's specialty units and case acceptance criteria are fairly uniform statewide. If appropriate, over-60 callers are also referred to local IIIB providers or to the Sixty Plus Legal Program, if eligible. Maryland has 28 Maryland Legal Services Corporation providers to consider when matching a client needing brief services, document preparation, or representation.

Maryland has a court based *pro se* program. If the caller appears to be capable of self-representation, the hotline directs callers to the specific location where they can get help with their *pro se* case. The *pro se* projects offer assistance with a wide range of family law cases. The family law section of the People's Law Library has been developed in collaboration with the assisted *pro se* projects, 20 of which are operated by the LAB. The newly established Family Division Court has also been involved in the development of these on-line resources designed to complement and supplement the work of the assisted *pro se* programs. A matrix of statewide *pro se* programs with hours of operation, addresses, and eligibility criteria is available for the hotline attorney's reference on the Intranet.

The University of Baltimore Law School Civil Litigation Unit also accepts specific types of referrals from the hotline. Law students handle rent escrow, security deposit, and other cases that can be resolved in about the length of a semester's time. The program is staffed by a professor and supervised by an attorney. During the semester, the supervising attorney sends the hotline weekly emails that give follow-ups on hotline referrals and describes certain

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cases that they would like to receive. These emails are posted on the Intranet, to help hotline attorneys make the most appropriate referrals.

### ***Training and Quality Control***

A formal hotline annual attorney training plan should be in place this summer. The plan calls for all hotline attorneys to attend two full day trainings per week for two consecutive weeks (28 hours total). The training will be designed for new and experienced Senior Legal Hotline attorneys and other attorneys expected to handle calls as part of the MLAN centralized intake model. LAB has had good success with rotating professional training days among the five full-time hotline attorneys. This model recognizes the Best Practices recommendation that only part-time attorneys staff the phones, so the full-time hotline staff attorneys spend four days per week handling hotline calls. The fifth day (different for each attorney) is spent working with a specialty unit attorney, co-counseling on a case, catching up on professional reading and study, visiting agencies, or doing extra research to help build or improve Intranet resources. The hotline attorneys report on their experiences at the weekly hotline meeting. Part-time attorneys also spend a few hours per week away from the phones for personal professional training.

Hotline attorneys also attend outside trainings as they come up. New attorneys spend a week at LAB walk-in intake becoming familiar with the types of cases they will be dealing with on the hotline and learning which cases are suitable for full-service intake through the hotline. Since the hotline attorneys all work closely in an open area, it is easy for them to consult with Pete or Luther or with each other. They can also send and receive electronic "stickit" notes to anyone on the staff while speaking to a client, to get help with handling a call.

Pete reviews the case notes and has developed relationships with the specialty unit supervising attorneys who provide feedback on the casenotes that are sent to the unit as part of client intake. The hotline attorneys also attend the specialty unit staff meetings to keep up-to-date on changes in the law and unit procedures.

Paper desk reference materials are sparse in the LAB hotline area – most of the materials have been placed on the program's Intranet. These include a list of referral agencies, the program's policy and procedural guidelines, Frequently Asked Questions, and links to substantive law and other sites.

### ***Equipment***

LAB has a Siemens 240 Basic Phone System. Seven lines are usable by hotline attorneys. Rollover capability substitutes somewhat for lack of automatic call distribution, but as more programs and offices participate in the centralized hotline, ACD will become imperative.

All LAB offices use Kemp's Clients for Windows case management software. However, the offices are not yet networked so that interoffice database access is not yet possible. Hopefully the area network will come online this summer. In the meantime, LAB collects client data from the other offices and bimonthly consolidates the data into a database. Although the satellite office data in the computer is two months old, it substantially reduces the possibility of conflicts with satellite office clients.

### ***Future Plans***

Four other agencies are expected to participate in the coordination of the Maryland hotlines supported by the MLAN project, including the LAB hotline as a major partner. These include the Maryland Volunteer Lawyers Service, House of Ruth, Baltimore Neighborhoods, Inc., and the Women's Law Center. All clients calling these agencies will be handled by a hotline worker, who may or may not be an attorney. The plan calls for the each agency to field hotline calls and to collect the data needed to route the calls to the appropriate agency. There will, in effect, be hotline attorneys at each agency who will join LAB staff in taking calls and inputting basic data. This will require the installation of ACD to avoid having to shunt the increasing number of callers into voice mail. Emergency calls will be routed to designated attorneys.

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In late June or July, an additional shared 800-telephone number will be installed. Agencies will continue to keep their presence in the community via established local and 800 number intake lines that will be coordinated with the new number. Maryland is seeking to capitalize upon its strong history of hotline work in multiple organizations by a centralized intake plan that builds upon the expertise and supervisory structure within the existing organizations. The organizations were chosen to work together on this project as they handle 77% of the cases in the state as well as the vast majority of the two largest areas of client demand – housing (LAB and BNI) and domestic (Women’s Law Center and House of Ruth – domestic violence). This project is a joint effort under the MLAN grant. See the related MLAN article for more information on the process and next steps.



*Revised ABA Standards for the Operation of a Telephone Hotline Providing Legal Advice and Information*

**In May, 2001 the ABA Standing Committee on the Delivery of Legal Services completed its drafting of Standards for the Operation of a Telephone Hotline. On May 23rd, the Committee submitted a recommendation calling for the adoption of the standards to be considered by the ABA House of Delegates at the ABA Annual Meeting in August.**

**To download the new Standards please go to [www.equaljustice.org/hotline1](http://www.equaljustice.org/hotline1)**

## Legal Hotline Technical Support Resources

[www.equaljustice.org/hotline1](http://www.equaljustice.org/hotline1)

**At this site you can access:**

- the latest developments in the legal hotline world such as the status reports on the Hotline Outcomes Assessment study
- ABA draft rules affecting hotlines
- A searchable directory of legal hotlines
- Current and recent issues of the Legal Hotline Quarterly
- Current and recent issues of the Legal Hotline Bulletin
- Detailed profiles on the operations of numerous hotlines

[www.povertylaw.org/hotline/hotline](http://www.povertylaw.org/hotline/hotline)

**At this site you can access or order in hard copy:**

- State-specific Frequently Asked Questions and Self-Help Pamphlets
- Client satisfaction and outcomes surveys
- Successful AoA hotline grant proposals
- Back issues of the Legal Hotline Quarterly
- Hotline procedural manuals and much more.

To be added to the legal hotlines email group please email Shoshanna Ehrlich:  
[rose99@mediaone.net](mailto:rose99@mediaone.net)

## Working Together: How Hotlines Can Support Aging and Legal Services Networks

*Ellie Crosby, Managing Attorney,  
Georgia Senior Legal Hotline*



### Background.

In some states, Senior Legal Hotlines funded under Title IV of the Older Americans Act are not considered part of the state's Legal Assistance network. This could be because hotlines are typically funded by Title IV of the Older Americans Act rather than with Title IIIB dollars. In some states, Senior Legal Hotlines exist outside of the Legal Services network, as well. Funding sources aside, there is much to be gained for clients and providers alike from working together. In many states hotlines are considered part of the array of services available to assist low income and vulnerable seniors. This article will outline and highlight ways that hotlines can be an integral part of the existing aging and legal assistance and legal services networks in their states.

### What Hotlines Do:

Most seniors' hotlines are set up to provide legal advice, brief service, self-help information and referrals to older persons. Some place a heavier emphasis on providing information and referrals only and view themselves as screening mechanisms for other legal services of legal assistance programs. Other hotlines provide brief services, including document review, drafting letters, reviewing documents, etc. Still others provide more in-depth services such as ghost writing pleadings and drafting wills. Many hotlines target services to a particular population such as vulnerable adults, victims of abuse or low-income seniors. The target populations for hotlines often mirror or overlap targeted populations for legal assistance or legal services so they are natural partners in efforts to serve these populations. Hotlines cannot and should not be the sole or primary provider of legal assistance to seniors in a state. They

are set up to handle cases where all that is needed is a bit of advice, brief service, information or referral information.

### Ideas for Collaboration:

Because Hotlines typically serve large numbers of clients, hotline staff can spot trends or problems in substantive or geographic areas. For example, in Georgia we were able to identify a problem with improper Medicaid notices, determine that the problem was statewide, alert advocates and agency personnel, and provide appropriate guidance to callers who had received incorrect notices. Hotlines are also in the position to provide data regarding legal problem areas that can be used in advocacy efforts. We started keeping track of outcomes data for United Way and were surprised at the economic impact the hotline has had on the lives of our clients. Hotlines staff can also look for good cases if advocates need to find clients with particular problems or fact patterns. The hotline can be an effective partner with non-legal programs such as shelters, adult protective services, care managers, senior centers and hospital and nursing home social services staff and long-term care ombudsmen.

### If you have a hotline in your state:

If you have a hotline in your state and you are not involved or connected with it, you could contact the manager to find out more about what services they provide and whom they serve. If your program efforts overlap, discuss ways that you can work together. We have been able to stretch our scarce resources by conducting joint training, sharing materials, sharing referral lists and other resources. If the hotline typically refers clients to your program it is important that you develop a good relationship with hotline staff so that you can be sure that referrals are appropriate and that clients do not fall through the cracks if you are unable to assist them.

### If you do not have a hotline in your state:

If you do not have a hotline in your state, you ought to consider getting together with others in your state to apply for hotline funding through AoA or from other sources. Get in on the ground floor of planning to assure that the hotline will complement

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and not duplicate your efforts. When we started the Georgia hotline, the hotline goals included increasing the availability of legal assistance to vulnerable and low-income seniors and to increase the capacity of legal assistance providers to handle more complex cases. We view the legal assistance providers and legal services offices as our service partners and we value those relationships. State and local bar associations, legal services providers, the legal assistance network and most importantly the Legal Services developer are all important allies in our efforts to better serve clients.

### **If you are working with a hotline:**

If you are working with a hotline, you should be well acquainted not only with the staff in local legal assistance offices but also with staff at the state level, most notably the Legal Services Developer (LSD) for your state. The LSD can be of great help in publicizing your hotline, locating additional *pro bono* or reduced fee resources, providing training, and obtaining funding, among other things. In Georgia, the LSD spearheaded an effort to get funding for hotline services included in the state budget for aging services. She has also assisted by bringing systemic problems to the attention of state agency personnel and by developing a legislative response where other advocacy efforts have failed. As the person who is responsible for coordinating legal assistance services to seniors within your state, the LSD needs to know about your problems and your successes.

### **Conclusion**

Maybe most of these points are obvious or could go without saying. In Georgia we communicate freely and often with other parts of the aging and legal services networks and we still don't always get it right. However, I have been surprised (and a little alarmed) to learn that in other states, hotline staff might not even know the LSD and legal assistance providers and LSDs don't interact often with hotline staff. Not only does increased communication improve our client services by assuring that referrals are smooth and appropriate, it also can increase our capacity to serve clients by stretching and increasing the resources available.

## ***Legal Information vs. Legal Advice***

*as defined by the ABA at [www.findlegalhelp.org](http://www.findlegalhelp.org)*

The difference between “legal information” and “legal advice” has been hotly debated in the legal hotline world. The ABA Standing Committee on the Delivery of Legal Services defined the essence of the difference between the terms for lawyers in its Introduction to the Draft Standards for the Operation of a Telephone Hotline Providing Legal Advice and Information. The Committee stated that the Standards are directed to hotline systems “that have the *capacity* (emphasis original) to provide fact-specific legal advice that assists callers in reaching decisions about legal matters and/or taking steps to resolve those matters. In such a situation, the hotline is providing legal services and its personnel are practicing law.”

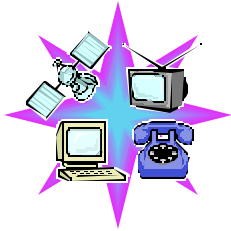
The ABA explains the difference between “legal advice” and “legal information” to lay consumers of legal services at its new web page devoted to helping people find legal resources on the internet:

“Anyone can offer, or sell, ‘legal information’. But only lawyers can provide legal ‘advice’. The line between the two is often blurry. Legal information is supposed to be general and not based on a specific set of facts. Legal advice is when a trained lawyer uses his/her knowledge of the law to tell you how the law applies to the specific factual circumstances you describe. When you get legal advice, your also enter into an attorney-client relationship. This brings with it certain protections. Your lawyer can't tell others what you said without your permission. Your lawyer can't represent other people whose interests conflict with your own and are adverse to yours. None of these protections apply when you merely go to someone for legal information.”

The website “Consumers Guide to Legal Help on the Internet” [www.findlegalhelp.com](http://www.findlegalhelp.com) has links to bar-sponsored, public service, and commercial providers of legal help on the internet.



## Phone System Acquisition Options



A high volume hotline with a considerable number of telephone advocates will need an automated call distribution system. A sophisticated system designed for large offices (more than 65 users) capable of directing clients to specific call handlers and generating reports on a wide variety of factors, such as the Lucent Definity\* system used by CLEAR, can cost between \$80,000-\$100,000. Hotlines have three options in this regard:

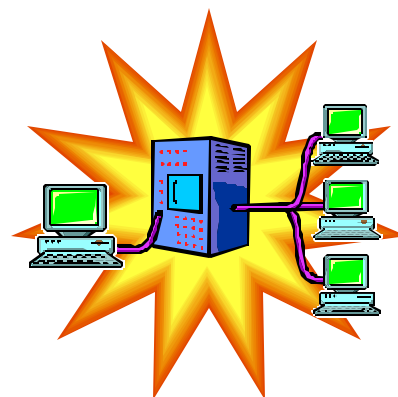
1) *Purchasing*: The advantage of purchasing is that after the initial expense, the program will only need to pay for maintenance contracts and phone services. With careful planning, it may serve the program well for many years. The disadvantages are that a large initial outlay is required and the system may need to be upgraded requiring additional expense.

2) *Leasing*: For programs wishing to avoid the initial outlay, Expanets, the provider for the Lucent system mentioned above, offers phone systems for lease. Leases come in 24, 36, 48 and 60 month increments. Expanets quotes a monthly amount of \$1758 to lease an \$80,000 Lucent telephone system. After the 60 months, the program can buy out the lease, upgrade to a newer system, or continue the lease for a lower monthly amount. If the program's goal is to purchase the system, a lease to purchase option is available for a cost of \$1,886 monthly for 60 months (total cost \$113,160.)

*\*The Project does not recommend any particular product or service but provides this data in keeping with its mission to inform legal hotlines about available products, services, and resources.*

Other providers also offer leasing options. The main advantage of leasing is the avoidance of the initial capital outlay. This may be very attractive to programs that do not have start up grants and cannot afford the large purchase expense. Another advantage is that at the end of the lease term the program has a choice of whether to upgrade or keep the system. The main disadvantage is that the total cost for system will exceed the purchase price.

3) *Outsourcing* : A telephone service provider such as Tele-Lawyer, Inc., 800-835-3529 enables a hotline to begin operating without the need to purchase or install complex phone systems. The sophisticated phone system is housed at the provider's offices and hotline advocates, whether in the hotline office or at their own homes or offices, can log onto the phone system via their computers, and have calls routed to them as they are available. Generally fees are structured with a one-time set up fee, a monthly service/maintenance fee and a per-minute fee. The range of fees depends on the services selected. See, *Telephone Consultant Services LHQ Summer 2000*.



## ***Hotlines, Email Intake and Consultation***

Client access to the hotline advocate by email is a natural development in today's wired world. Many programs receiving the occasional email communication from a new client will supply the hotline telephone number in the reply and ask the client to call in. Some programs, however, are in the forefront of developing organized procedures for soliciting and accepting email communications as part of planned client access to the hotline/full-service program.

**The Legal HelpLine for Older Kentuckians**, a Project of the Kentucky Access to Justice Foundation, invites email contact with the hotline at its website [www.seniorlegallhelpline.org](http://www.seniorlegallhelpline.org). The client is asked to provide his name, address, and phone number in the email which is addressed to a Legal HelpLine attorney. The matter is then handled in one of two ways. The hotline attorney will either call the client back and then treat the case as any other call coming into the hotline. Or, where the subject matter is amenable to an email exchange, the entire service is handled over the internet. The hotline attorney must have the client's name, address, age, and legal issue before determining if he can provide email information or advice. So far, the Kentucky Senior HelpLine has provided email information on asset transfer rules for Nursing Home Medicaid and basic probate procedures.

The Legal HelpLine for Older Kentuckians has been accepting email contacts for about a year, averaging 4-5 per month, most of which are handled by a return phone call from the hotline attorney. The program has not advertised the availability of the email contact widely as yet. It has viewed email contact as a way to boost its call volume rather than a manner of service delivery. However, the hotline attorney sees email as a particularly effective way to provide legal services to homeless or extremely low-income people with no phones. Many of the email contacts that come into the HelpLine are from people in senior centers or libraries where free internet access is provided. Some of these clients have their own Hotmail or other free email accounts. Even clients who come into the library with no internet ac-

count can receive assistance to set up an email account on the spot so that they can receive confidential responses to their email inquiries to the hotline.



**The Senior Legal Hotline at Legal Services of Northern California** saw a perfect opportunity to create a website and email intake. California *Cy Pres* Fund technology grants were offered to develop projects "Using Technology for Better Access to the Legal System." The Senior Legal Hotline was awarded a grant sufficiently generous to hire a web site developer, additional staff time to maintain the website, and two part-time attorneys to handle the additional volume the email intake was expected to generate.

The website, [www.seniorlegallhelpline.org](http://www.seniorlegallhelpline.org), contains information about the hotline, fliers about substantive law topics the user can download, and information about other legal services in the community. The user can select whether to view the website and materials in English or Spanish. David Mandel, the Managing Attorney, and his staff consciously decided not to post more detailed materials or forms, such as health care directives, on the site because they felt clients should get advice from a legal hotline or other attorney before filling out these forms or following procedures described in the detailed brochures. The hotline mails these out after the attorney has spoken with the client and determined the appropriate brochure or form the client should receive.

The website prominently invites the user to "Email us for legal advice". Clicking on that link will bring the user to a form to fill out with his name, phone, and other demographic information. If the person is emailing on behalf of a senior, the senior's name and demographic information must be provided. The user puts into the form some convenient times to be called back. He also has unlimited space to describe the question or problem about which he is seeking legal advice.

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## Websites of Interest

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The Legal Hotline Administrative Support Clerk reads all the email messages and sends a reply indicating the time the hotline attorney will call the client. This hotline answers calls live but also makes appointments for overflow callers to receive call-backs. Email messages are handled the same way. The attorney to whom the message has been assigned will have the email printed out and attached to his appointment calendar. This method has two important benefits. First, the demographic information is already noted in the email print-out so the hotline attorney doesn't have to spend any time eliciting that during the call. Secondly, the hotline attorney has time to read the client's question and comes to the call prepared with any preliminary research and reference materials at-the-ready.

The web site developers are currently working on getting the email demographic information into the Kemp's Clients case management software with one click. The data from the email must now be manually input into Clients. However, email initial contacts are extremely desirable for the hotline since they streamline the time spent on the phone substantially. The hotline started promoting the website in March 2001 and a local newspaper carried a story about it at the beginning of April. As a result of the story, the hotline has received about 15 email intakes per week. As more and more seniors acquire internet access the number is sure to rise. The website also provides another port of entry to hotline services for senior centers and social workers seeking to access legal assistance for an older or low-income person.

Clearly, the days of virtual clients and virtual attorneys are still in the pre-planning stages at most legal services programs. However, organizations are starting to seek out grants to expand their ability to accept clients and provide services via the web. Legal Counsel for the Elderly in Washington D.C. is about to launch a Virtual Law Office Project where volunteers at senior centers and libraries will help clients access legal information over the internet as well as access the LCE Hotline from the site. We will report on the progress of that project in upcoming editions of *the Quarterly*.

### **www.ilor.com**

Internet Lore Search Engine: This is a new and improved version of the "google" search. It started operating this Spring. It provides enormous help in navigating the results of your search by letting you open different types of task bars and windows which allow you to view sites without constantly having to hit the 'back' button.

### **www.findlegalhelp.org**

The ABA has developed a website which catalogues a variety of legal help available online. It includes links to legal services organizations, bar sponsored legal assistance as well as commercial providers of legal advice and lawyer referral services. Links to legal information take you to state sites featuring information sponsored by bar associations and others such as: ABA Division of Public Education, Florida Bar Consumer Services, Maryland People's Law Library.

### **www.callcentermagazine.com**

This website is a warehouse of information for call centers. It has a buying guide for call center technology and a variety of e-newsletters you can subscribe to.

### **www.ilrg.com/forms**

The Internet Legal Resource Site contains a large variety of forms searchable by categories such as Buying and Selling, Credit and Collection, Employment, Leases and Tenancies, Loans and Borrowing, Personal and Family and others. The website contains a "consult an attorney" disclaimer but the forms may be very useful in conjunction with a hotline attorney's advice.

## *From the Frontline*

### *The Frontline Takes a Backseat*

By Carol Matthews, LCE Hotline Attorney

I recently had the pleasure of spending a few days in sometimes sunny San Diego at the NLADA conference. There were a number of workshops focusing on hotline issues but one topic was missing. In the year since the NLADA conference in Houston hotlines appear to have gained broad acceptance. Last year there was still a lot of skepticism about the merits of hotlines provoking defensive responses from hotline supporters. But not this year. No longer was there any discussion of whether or not hotlines could provide useful assistance or had a role in the delivery of quality legal services. Instead the talk was all about how to have more hotlines, better hotlines, hotlines in conjunction with other services. The attention was on new technologies, new ways of organizing programs, and new sources of funding.

The ABA is nearing completion of standards for legal hotlines and they will probably be approved in the near future. This is certainly a recognition that hotlines are here to stay. The proposed standards embody a clear expectation that legal advice via the hotline will be of the highest quality and advance the “core values” of the legal profession.

It also became clear that the “frontline” is not where all the action is. I probably was not the only hotline attorney there but it sometimes felt that way. Most of the attendees were legal services, hotline, *pro bono*, other project managers, directors, supervisors, or developers. Not too many humble hotline advocates, or so it seemed. Actually, it was rather awesome to see how much work it takes to produce a hotline. First there is the problem of finding the money, locating funding, writing grants, cajoling benefactors, etc. Then there is the problem of setting up a program, choosing software, hiring brilliant lawyers for little money, luring volunteers to fill in the gaps, and on and on. The tasks seem endless and enormous.

All this work so that I, and my hotline colleagues, can spend our days gabbing on the phone like a bunch of teenagers. Well, that’s not the official description of a hotline but it is *fun* to talk to people on the phone, hear their stories, and solve their problems. When the managers describe new programs that will improve hotline quality, efficiency, etc., they often talk in terms of calls per hour or cases per FTE instead of the pleasure of meeting and helping so many individuals. But I, and any other hotline attorney sitting in the back row, am thinking about Mrs. Jones’ foreclosure, or her sister’s abusive spouse, or her son’s SSI, or her neighbor’s dog, or her friend’s eviction. Their stories may be neatly classified, fitted with codes, and turned into statistics. But before that happens one of us has listened to them, advised, coached, educated, and helped them. And their stories are never the same.

## National Conference on Law and Aging

*Strengthening Protections  
and Building Bridges to  
Enhance Elder Rights*

October 10th-13th, 2001  
Arlington, VA

**For information contact Donna Barker  
dbarker@aarp.org or Ada Albright  
Aalbright@aarp.org**