

# SENIOR LEGAL HOTLINES

## ANNUAL REPORT

OCTOBER 1, 2002 - SEPTEMBER 30, 2003



*Compiled by the  
Legal Hotline Technical Assistance Project*



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# Legal Hotlines

A total of 19 senior legal hotlines reported their statistics to the AARP Foundation this year. The number of statewide legal hotlines dedicated to the service of seniors numbered 24 in 2003. 22 states, the District of Columbia and the Commonwealth of Puerto Rico all had statewide senior legal hotlines. The Senior Legal Hotline in California had been serving only Northern California because of the size of that state's population, but received an AoA Title IV grant for 2004 to provide statewide services. The Indiana Senior Legal Hotline stopped serving clients in Fall 03 after its AoA Title IV grant ended and new funding could not be located. As a result of the 2003 AoA Request for Proposals for Senior Legal Service Innovations, three established hotlines received new three year Title IV grants: CLEAR\*Sr at NW Justice Project in Washington State, New Hampshire Legal Assistance Senior Citizens Law Projects and Legal Services of Northern California which will now take the senior hotline statewide. One new program, Southeast Louisiana Legal Services, received a three year Title IV grant to establish a statewide Predatory Lending Project. Callers will be able to contact the Project via a toll-free number and appropriate cases will receive representation from the Project, in addition to telephone advice.

This year the 24 senior hotlines handled 95,097 calls and closed almost 66,000 cases. Almost 54,000 households were served. While all the senior hotlines advise on just about any civil legal matter, the CT hotline only handled consumer law issues. Since the CT, ID and SC hotlines were not in full operation for all of 2003, we did not include their totals in the averages of hotline productivity and cost-efficiency.

The Pennsylvania Advice Line which had been operated by Tele-Lawyer, Inc. under a contract with AARP was closed. AARP Foundation made a start up grant to the Philadelphia Senior Law Center which began operating the statewide Senior Law Helpline at the end of 2003. All Pennsylvania residents over 60 years of age may call for free telephone advice. The Senior Law Center will undertake to find additional funding for the HelpLine as the AARP grant is only for 2004.

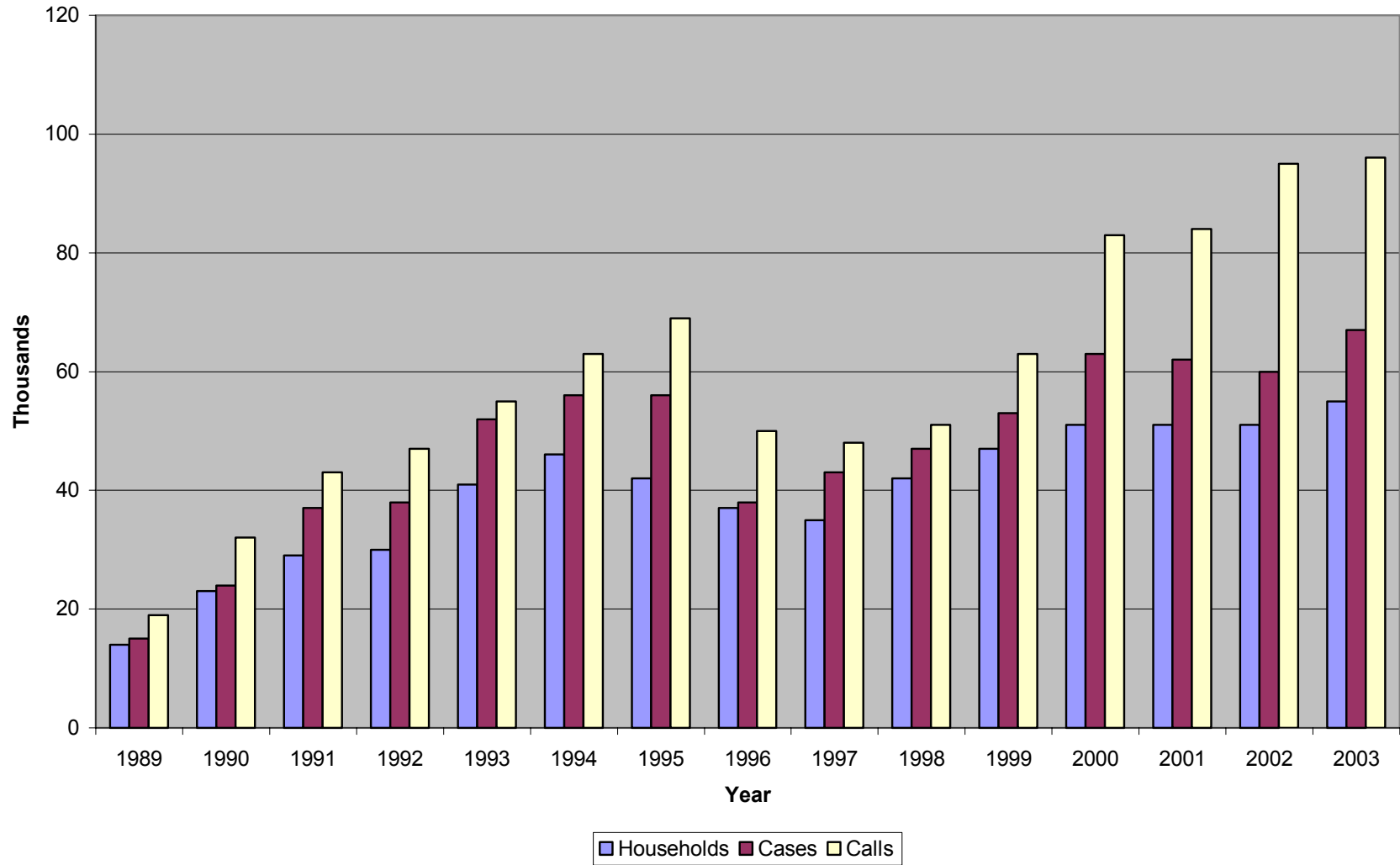
The AARP Foundation continued to provide technical assistance to legal hotlines with a grant from the Administration on Aging. The Technical Assistance Project provided on-call technical assistance to the senior legal hotlines, legal aid hotlines and many programs planning hotlines. The Project also publishes the Legal Hotline Quarterly and collects hotline related documents for cataloging at the National Center on Poverty Law Legal Hotline Technical Support Library. This year the Project redesigned the Legal Hotline online database and collected updated information for entry to the Legal Hotline Directory. The searchable directory and all legal hotline documents can be found at [www.legalhotlines.org](http://www.legalhotlines.org).

The Project manages two interactive Technical Support email groups at [legalhotlines@lstech.org](mailto:legalhotlines@lstech.org) and [seniorhotlines@lstech.org](mailto:seniorhotlines@lstech.org). Technical assistance queries posted there are answered by Project Staff as well as by other experienced legal hotline managers. The Project can be reached at 954-472-0997 or [sehrlich@aarp.org](mailto:sehrlich@aarp.org).



# Growth in Thousands

## Households, Cases, Calls





## 12 Month Productivity, part 2

	<b>KS</b>	<b>KY</b>	<b>MD</b>	<b>*ME*</b>	<b>MI</b>	<b>MS</b>	<b>NH</b>	<b>NM</b>	<b>OH</b>	<b>*PA*</b>	<b>PR</b>
<b>Households Year Total</b>	927	1,752	2,005	1,684	4,099	680	1,129	3,549	4,681	3,230	2,000
<b>A: Cases Year Total</b>	997	2,176	2,506	1,980	4,773	850	1,411	6,117	5,264	3,230	2,500
<b>B: Calls Year Total</b>	1,350	3,612	3,283	5,544	5,124	1,114	1,849	9,750	5,790	3,359	3,275
<b>C: Avg FTE Paid Staff</b>	0.25	2.00	6.40	3.75	2.60	0.25	2.40	4.50	2.25	0.25	3.50
<b>D: Avg FTE Volunteers</b>	0.50	1.00	0.00	0.00	0.00	0.00	0.00	0.30	0.16	0.00	0.00
<b>E: Total FTE</b>	0.75	3.00	6.40	3.75	2.60	0.25	2.40	4.80	2.41	0.25	3.50
<b>Cases per FTE Staff</b>	3,988	1,088	392	528	1,836	3,400	588	1,359	2,340	12,920	714
<b>% time Paid Staff</b>	33.33%	66.67%	100.00%	100.00%	100.00%	100.00%	100.00%	92.00%	93.36%	100.00%	100.00%
<b>% time Volunteers</b>	66.67%	33.33%	0.00%	0.00%	0.00%	0.00%	0.00%	8.00%	6.64%	0.00%	0.00%
<i>Cases/hr (paid staff)</i>	1.99	0.54	0.20	0.26	0.92	1.70	0.29	0.68	1.17	6.46	0.36
<i>Calls/hr (paid staff)</i>	2.70	0.90	0.26	0.74	0.99	2.23	0.39	1.08	1.29	6.72	0.47
<b>F: Hotline Cost</b>	\$39,282	\$135,000	\$331,984	\$202,080	\$252,501		\$235,438	\$265,804	\$229,572	\$44,671	
<b>Cost/ Case</b>	\$39.40	\$62.04	\$132.48	\$102.06	\$52.90		\$166.86	\$43.45	\$43.61	\$13.83	
<b>Cost/ Call</b>	\$29.10	\$37.38	\$101.12	\$36.45	\$49.28		\$128.37	\$27.26	\$39.65	\$13.30	
Year Reported	2003	2003	2003	2003	2003	*2003	2003	2003	2003	*2003	*2003

*Figures in Italics are estimates based on ratio of Households/Cases (0.80); Calls/Cases (1.31) (from 11 hotlines which reported all three figures in 2002)*

*\*AZ, MS, PR, TX: Total cases taken from Legal Hotline Directory Update. PA: hotline stopped taking calls in early September 2003.*

*ME: Totals do not include 2,556 SHIP calls.*

*NH: Since the NH hotline no longer receives AoA funding, some of the information provided is based on the total amount of funding they receive for senior work, which primarily consists of Advice Line hours.*

## 12 Month Productivity, part 3

	SC-new	TX	WA	WV	WY	All Hotlines TOTALS (24)	Minus 3 New Hotlines (See footnotes) Average (21)	Minus New Hotlines and 5 Hotlines which did not provide Hotline Cost Totals (16)	Average (16)
<b>Households Year Total</b>	425	6,320	2,479	601	222	<b>53,975</b>	<b>2,249</b>	39,384	2,462
<b>A: Cases Year Total</b>	439	7,900	2,533	751	254	<b>65,911</b>	<b>2,746</b>	47,750	2,984
<b>B: Calls Year Total</b>	575	10,349	2,621	984	254	<b>95,097</b>	<b>3,962</b>	71,436	4,465
<b>C: Avg FTE Paid Staff</b>	1.00	4.00	1.50	1.25	0.50		<b>2.44</b>		
<b>D: Avg FTE Volunteers</b>	0.00	0.00	0.00	0.00	0.00		<b>0.13</b>		
<b>E: Total FTE</b>	1.00	4.00	1.50	1.25	0.50		<b>2.57</b>		
<b>Cases per FTE Staff</b>	439	1,975	1,689	601	508		<b>1,168</b>		
<b>% time Paid Staff</b>	100.00%	100.00%	100.00%	100.00%	100.00%		<b>94.76%</b>		
<b>% time Volunteers</b>	0.00%	0.00%	0.00%	0.00%	0.00%		<b>5.24%</b>		
<i>Cases/hr (paid staff)</i>	0.22	0.99	0.84	0.30	0.25		<b>0.53</b>		
<i>Calls/hr (paid staff)</i>	0.27	1.29	0.87	0.48	0.25		<b>0.79</b>		
<b>F: Hotline Cost</b>	\$254,064		\$200,000	\$199,000	\$42,000			<b>16 states \$3,051,154</b>	<b>Average (16) \$190,697</b>
<b>Cost/ Case</b>	\$578.73		\$78.96	\$264.98	\$165.35				<b>\$63.90</b>
<b>Cost/ Call</b>	\$441.85		\$76.31	\$264.98	\$165.35				<b>\$42.71</b>
Year Reported	2003	*2003	2003	2003	2003				

\*Figures in Italics are estimates based on ratio of Households/Cases (0.80); Calls/Cases (1.31)(from 11 hotlines which reported all three figures in 2002 )

\*AZ, MS, PR, TX: Total cases taken from Legal Hotline Directory Update. PA: hotline stopped taking calls in early September 2003.

\*Avg Total Cost/Case and Avg Total Cost/Call is based on the total cases (47,750) and total calls (71,436) of the 16 hotlines which reported their Hotline Cost (excluding CT, ID, and SC which are new, so their costs include startup costs.).

\*New Hotlines: Averages for CT, ID and SC are not included in the summary averages because these three hotlines were not in full operation for all of 2003.

## COMPARISON OF 2002 AND 2003, part 1

		AZ	CA	CT	DC	GA	HI	IA	ID	KS	KY	MD	ME	MI
<b>Households served</b>	02	2,592	6,305	new	1,633	3,111	806	2,473	new	2,028	1,739	1,756	1,712	3,818
	03	2,000	5,913	313	2,183	3,051	835	3,227	837	927	1,752	2,005	1,684	4,099
<b>Cases handled</b>	02	3,240	7,654	new	2,728	3,889	1,499	2,720	new	2,157	2,172	2,195	1,865	4,485
	03	2,500	7,158	407	2,728	3,705	1,542	3,353	837	997	2,176	2,506	1,980	4,773
<b>Calls handled</b>	02	5,979	15,743	new	2,785	10,906	2,729	2,720	new	2,205	3,388	2,875	5,222	4,054
	03	3,275	14,665	402	3,574	7,039	2,859	3,353	837	1,350	3,612	3,283	5,544	5,124
<b>Average cases/hr (paid staff only)</b>	02	0.93	0.62	new	0.71	0.52	0.50	0.63	new	0.95	0.54	0.15	0.23	1.12
	03	0.83	0.58	0.07	0.91	0.49	0.51	0.76	0.28	1.99	0.54	0.20	0.26	0.92
<b>Average calls/hr (paid staff only)</b>	02	1.71	1.27	new	0.93	1.45	0.91	0.63	new	0.97	0.85	0.20	0.65	1.01
	03	1.09	1.18	0.07	1.19	0.94	0.95	0.76	0.28	2.70	0.90	0.26	0.74	0.99

## COMPARISON OF 2002 AND 2003, part 2

		MS	NH	NM	OH	PA	PR	SC	TX	WA	WV	WY	TOTALS
<b>Households served</b>	02		1,519	4,287	4,708	3,878		new	5,966	2,379	580	226	<b>51,516</b>
	03	680	1,411	3,549	4,681	3,230	2,000	425	6,320	2,479	601	222	<b>53,975</b>
<b>Cases handled</b>	02		1,899	7,819	5,423	3,878		new	7,962	2,460	725	282	<b>64,450</b>
	03	850	1,411	6,117	5,264	3,230	2,500	439	7,900	2,533	751	254	<b>65,911</b>
<b>Calls handled</b>	02		2,488	9,080	5,857	4,032		new	8,823	2,750	950	282	<b>92,868</b>
	03	1,114	1,834	9,750	5,790	3,359	3,275	575	10,349	2,621	751	254	<b>95,097</b>
<b>Average cases/hr (Paid staff only)</b>	02		0.47	1.20	1.51	6.46		new	1.70	0.65	0.36	0.28	<b>0.66</b>
	03	1.70	0.29	0.68	1.17	6.46	0.36	0.22	0.99	0.84	0.30	0.25	<b>0.53</b>
<b>Average calls/hr (Paid staff only)</b>	02		0.62	1.40	1.63	6.72		new	1.89	0.72	0.48	0.28	<b>0.95</b>
	03	2.23	0.38	1.08	1.29	6.72	0.47	0.27	1.29	0.87	0.30	0.25	<b>0.79</b>

Figures in *Italics* are estimates based on ratio: **Households = 0.8\*Cases; Calls = 1.31\*Cases,**  
*CT, ID and SC averages are not included in the summary averages because these three hotlines were not in full operation for all of 2003.*

## FINANCIAL COMPARISON OF 2002 AND 2003

		CA*	CT	GA	HI	IA	ID	KS	KY	MD	ME
<b>Total cost</b>	02	\$368,325	new	\$271,350	\$46,670	\$188,822	new	\$52,897	\$110,000	\$289,639	\$248,422
	03	\$383,025	\$282,302	\$254,160	\$46,670	\$189,967	\$172,350	\$39,282	\$135,000	\$331,984	\$202,080
<b>Total project-generated income (Reduced fee panel, donations and fees)</b>	02	\$16,087		\$1,200							
	03	\$19,347									
<b>Gross cost/case</b>	02	\$48.12	new	\$69.77	\$31.13	\$69.42	new	\$24.52	\$32.23	\$131.95	\$133.20
	03	\$53.51	\$693.62	\$68.60	\$30.27	\$56.66	\$205.91	\$39.40	\$62.04	\$132.48	\$102.06
<b>Net cost/case</b>	02	\$46.02	new	\$69.47	\$31.13	\$69.42	new	\$24.52	\$32.47	\$131.95	\$133.20
	03	\$26.12	\$702.24	\$36.11	\$30.27	\$56.66	\$205.91	\$39.40	\$62.04	\$132.48	\$36.45

		MI	NH	NM	OH	PA	SC	WA	WV	WY	TOTALS	
<b>Total cost</b>	02	\$190,971	\$161,350	\$238,743	\$242,852	\$53,627	new	\$203,723	\$173,114	\$25,000	<b>\$2,865,505</b>	New hotlines Not included (16 hotlines)
	03	\$252,501	\$235,438	\$265,804	\$229,572	\$44,671	\$254,064	\$200,000	\$199,000	\$42,000	<b>\$3,051,154</b>	(16 hotlines)
<b>Total project-generated income (Reduced fee panel, donations and fees)</b>	02	\$3,200	\$25,000		\$2,945	\$11,158	new		\$4,702		<b>\$64,292</b>	
	03	\$7,790				\$9,295			\$7,759		<b>\$44,191</b>	
<b>Gross cost/case</b>	02	\$42.58	\$84.97	\$30.53	\$44.78	\$13.83	new	\$82.81	\$238.78	\$88.65	<b>\$44.46</b>	
	03	\$52.90	\$166.86	\$43.45	\$43.61	\$13.83	\$578.73	\$78.96	\$264.98	\$165.35	<b>\$63.90</b>	New hotlines not included
<b>Net cost/case</b>	02	\$41.87	\$71.80	\$30.53	\$44.24	\$10.95	new	\$82.81	\$232.29	\$88.65	<b>\$43.46</b>	
	03	\$51.27	\$166.86	\$43.45	\$43.61	\$10.95	\$578.73	\$78.96	\$254.65	\$165.35	<b>\$62.28</b>	New hotlines not included

\*Gross Cost does not include in-kind volunteer support in CA=\$111,041

\*Total Gross Hotline Cost, Avg Gross Cost/case and Avg Net cost/case are based on # of hotlines reporting.

## HOTLINE ADVOCATES, part 1

	AZ	CA	CT	DC	GA	HI	IA	ID	KS	KY	MD	ME	MI
<b>Avg FTE Paid</b>													
Attorneys	0.75	3.00	1.00	1.50	3.75	1.00	2.00	1.50		2.00	6.70	3.00	2.60
Paralegals	1.00	3.20	1.00			0.50			0.25		0.20	0.75	
Law Students			1.00				0.15						
<i>support staff</i>													
<i>intake</i>													
<b>Avg FTE Volunteers</b>													
Attorneys		1.00			0.25		0.10		0.50				
Paralegals		0.30											
Law Students		0.40			0.25					1.00			
<i>social workers/students</i>		0.40											
<i>intake</i>													
<b># Paid (year end)</b>													
Attorneys	2	4		6	8	12	3	4		2	8	5	3
Paralegals	1	5			1	5			2		1	1	
<i>intake</i>									4				
<b># Volunteers (year end)</b>													
Attorneys		23			2		3		107				10
Paralegals		5											
Law Students		2				2		2		5		1	
<i>social workers/students</i>													
<b># Paid-Added during year</b>													
Attorneys					2	6	1	3		1	1	1	1
Paralegals					1	5							
<b># Volunteers-Added during year</b>													
Attorneys							1						
Paralegals													
Law Students					3	2		2		5		1	
<i>social workers/students</i>													
<b># Paid-Dropped during year</b>													
Attorneys		2			1	3	1				1	2	
Paralegals		3				7							
<b># Volunteers-Dropped during year</b>													
Attorneys									7				
Paralegals						1							
Law Students					1	1		2				1	
<i>social workers/students</i>													
<i>intake</i>										1			
year reported	2001	2003	2003	2003	2003	2003	2002	2003	2003	2003	2003	2002	2003

## HOTLINE ADVOCATES, part 2

	MS	NH	NM	OH	PA	PR	SC	TX	WA	WV	WY	TOTAL	AVG
<b>Avg FTE Paid</b>													
Attorneys	0.25	2.40	2.75	2.25	0.25	3.50	1.00	2.00	1.50	1.25	0.50	46.95	1.96
Paralegals			0.50							1		8.85	0.37
Law Students										0.5		1.65	0.07
<i>support staff</i>												1.80	0.08
<i>intake</i>												0.50	0.02
<b>Avg FTE Volunteers</b>													
Attorneys			0.50	0.16								2.41	0.10
Paralegals												0.20	0.01
Law Students										0.2		1.75	0.07
<i>social workers/students</i>												0.30	0.01
<i>intake</i>						0.75						0.75	0.03
<b># Paid (year end)</b>													
Attorneys	5	10	3	8	1	2		11	2	2	1	102	4.25
Paralegals			3			1				1		21	0.86
<i>intake</i>									1	1		5	0.21
<b># Volunteers (year end)</b>													
Attorneys			2	2								147	6.13
Paralegals												5	0.21
Law Students										1		10	0.42
<i>social workers/students</i>												2	0.08
<b># Paid-Added during year</b>													
Attorneys				1				4				21	0.85
Paralegals												6	0.25
<b># Volunteers-Added during year</b>													
Attorneys				1								17	0.71
Paralegals												3	0.13
Law Students												16	0.67
<i>social workers/students</i>												1	0.04
<b># Paid-Dropped during year</b>													
Attorneys						2						11	0.46
Paralegals								1				11	0.46
<b># Volunteers-Dropped during year</b>													
Attorneys								2				15	0.63
Paralegals												1	0.04
Law Students												7	0.29
<i>social workers/students</i>												2	0.08
<i>intake</i>												1	0.04
year reported	2001	2001	2002	2003	2002	2001	2003	2002	2003	2003	2003	<b>TOTAL</b>	<b>AVG</b>

# Senior Legal Hotlines Annual Report

## TOTAL COST, FUNDING SOURCES

October 1, 2002 – September 30, 2003

### ARIZONA (2001)

TOTAL COST .....\$ 95,000

FUNDING SOURCES

Arizona Supreme Court .....\$ 95,000

### CALIFORNIA 2003

TOTAL COST .....\$383,025

FUNDING SOURCES

Area Agency on Aging (various projects).....\$132,488  
 Legal Services (in-kind from parent agency).....\$119,484  
 County tobacco litigation funds .....\$ 72,750  
 Foundation grants for special projects.....\$ 36,684  
 Donations .....\$ 19,477  
 Misc. (training revenue, materials fees .....\$ 2,272

(In-Kind Support (volunteers) not included in total above..... \$111,041)

**Total** ..... \$243,529

### CONNECTICUT 2003

TOTAL COST .....\$282,302

FUNDING SOURCES:

DSS – Administration on Aging.....\$125,000  
 The State of CT - Social Services Block Grant .....\$ 50,072  
 The Connecticut Bar Foundation – Interest on Lawyers Trust Account Program.....\$101,552  
 In-Kind Donations .....\$ 5,678

### GEORGIA 2003

TOTAL COST .....\$254,160

This figure represents money that funded other activities in addition to HL call handling. Using this figure to calculate the cost of running the hotline will lead to an inflated cost per call and case figure. The cost of handling hotline calls is estimated to be approximately \$147,500 for the year.

### HAWAII 2003

TOTAL COST .....\$ 46,670

FUNDING SOURCES

Administration on Aging .....\$ 35,000  
 Legal Services.....\$ 11,670

### IDAHO 2003

TOTAL COST .....\$172,350

FUNDING SOURCES

Administration on Aging .....\$104,669  
 Legal Services.....\$67,681

### IOWA 2003

TOTAL COST .....\$189,967

FUNDING SOURCES

Administration on Aging .....\$100,000  
 Area Agency on Aging .....\$ 18,875  
 IO(L)TA .....\$ 20,066  
 Iowa Executive Council.....\$ 51,026

# Senior Legal Hotlines Annual Report

## TOTAL COST, FUNDING SOURCES

October 1, 2002 – September 30, 2003

### KANSAS 2003

TOTAL COST .....\$ 39,282

#### FUNDING SOURCES

Legal Services.....\$ 12,282  
 IO(L)TA.....\$ 27,000  
 In-Kind Support .....volunteer attorneys,  
 ..... no value figured

### KENTUCKY 2003

TOTAL COST .....\$135,000

#### FUNDING SOURCES

Administration on Aging .....\$100,000  
*In-kind Support from:*  
 Access to Justice Foundation .....\$ 20,000  
 Association of Older Kentuckians ..\$ 15,000

### MARYLAND 2003

TOTAL COST .....\$331,462

#### FUNDING SOURCES

Administration on Aging .....\$122,462  
 Maryland Legal Assistance  
 Network.....\$ 24,100  
 Legal Aid Bureau.....\$185,422

### MAINE 2003

TOTAL COST .....\$202,080

#### FUNDING SOURCES

Administration on Aging .....\$ 114,000  
 Area Agencies on Aging.....\$ 15,000  
 Maine Civil Legal Services Fund ...\$ 35,400  
 SHIP.....\$ 35,160  
 United Way .....\$ 10,000  
 IOLTA.....\$ 2,170

### MICHIGAN 2003

TOTAL COST .....\$252,501

#### FUNDING SOURCES

Federal Funding .....\$149,711  
 State Funding .....\$ 15,000  
 State Bar Foundation.....\$ 51,000  
 Office of Services to the Aging ....\$ 9,000  
 Comerica, Ford, BCBSM.....\$ 20,000  
 Individual Contributions .....\$ 7,790

### NEW HAMPSHIRE 2003

TOTAL COST .....\$235,438

#### FUNDING SOURCES

Title IIIB Funds.....\$ 187,887  
 United Way .....\$ 47,551  
 Since our hotline no longer receives AoA  
 funding, some of the information provided is  
 based on the total amount of funding we  
 receive for senior work, which primarily  
 consists of Advice Line hours

### NEW MEXICO 2003

TOTAL COST .....\$265,804

#### FUNDING SOURCES

State Department on Aging (Aging and  
 Long Term Care Department).....\$192,180  
 State Bar of New Mexico:.....\$ 48,624  
 NM Civil Legal Service  
 Commission: .....\$ 25,000

# Senior Legal Hotlines Annual Report

## TOTAL COST, FUNDING SOURCES

October 1, 2002 – September 30, 2003

### OHIO 2003

TOTAL COST .....\$229,572

#### FUNDING SOURCES

Area Agency on Aging .....\$ 67,508

IO(L)TA .....\$124,138

United Way .....\$ 37,926

### PENNSYLVANIA (2002)

TOTAL COST .....\$ 44,671

#### FUNDING SOURCES

AARP .....\$ 35,377

Client Fees .....\$ 9,295

### SOUTH CAROLINA 2003

TOTAL COST .....\$254,064

#### FUNDING SOURCES

Administration on Aging .....\$ 80,727

Local non-federal match .....\$173,337

### TEXAS (2000)

TOTAL COST .....\$314,797

#### FUNDING SOURCES

State Department on Aging .....\$174,097

IO(L)TA (BCLS) .....\$137,458

Donations .....\$ 102

Client Fees (Referral Fees) .....\$ 3,140

### WASHINGTON 2003

TOTAL COST .....\$200,000

#### FUNDING SOURCES

AoA Funding .....\$102,450

State and other program funds .....\$97,550

### WEST VIRGINIA 2003

TOTAL COST .....\$199,000

#### FUNDING SOURCES

Administration on Aging .....\$122,964

State Department on Aging .....\$ 18,261

IO(L)TA .....\$ 24,780

Donations .....\$ 7,759

Other .....\$ 25,236

### WYOMING 2003

TOTAL COST .....\$ 42,000

#### FUNDING SOURCES

Administration on Aging .....\$ 42,000

# Senior Legal Hotlines Annual Report

## SIGNIFICANT EVENTS

October 1, 2002 – September 30, 2003

### **CALIFORNIA - 2003**

- We suffered only a slight decrease in numbers of cases and households served, despite loss of AOA funding and staff; this due to larger contributions by volunteers; greater efficiency; and partial fill-in support from parent agency.
- We held a training for community interpreters, now available on call to help us advise clients in multiple languages. Fliers and some fact sheets translated into 15 new languages.
- Most of the needed funds were raised for installation of a new, high-tech phone system. Part has been installed, but we're still in search of the remainder of the funds before we can complete the project.
- We have continued to produce new client educational materials and self-help packets, steadily enlarging our supply.
- We developed an extensive internal web site for staff use. Its centerpiece is an enlarged, updated advocate manual, now linked to statutes, other agencies and a multitude of on-line articles and other resources.
- News of a new AOA grant has us excited about the prospect of extending service statewide and undertaking new outreach projects and service types. We are also anxiously seeking additional funding sources, since the California hotline is now so disproportionately under funded compared to the population we are mandated to serve.

### **CONNECTICUT - 2003**

- **Significant Events**

We are really pleased to find that our vision for our clients of a seamless system of referrals from, to, and among our partners, works! Our partners have referred over 37% of our intakes and we have referred approximately 40 cases to various partners. Also, our holistic approach has resulted in the identification of numerous cases where our screening showed that callers were eligible for benefits or support they were not receiving. We were able to direct those callers to the appropriate agencies. Another significant finding involved the realization that we had to create more of a physical presence in minority communities, with the help of some of our partners, in order to serve seniors in those communities.

- **Trends**

We are seeing a large number of seniors suffering from overwhelming debt, particularly in the area of credit card debt. We can see in many cases that this is due to the abusive practices of creditors who offer and grant credit to people beyond their ability to pay.

- **Accomplishments**

In the last six months, in addition to getting the hotline up and running, we accomplished the

# Senior Legal Hotlines Annual Report

## SIGNIFICANT EVENTS

October 1, 2002 – September 30, 2003

following: a) work plans and training for hotline advocates; b) a desk-reference manual; c) a referral protocol with our partners and other social services agencies; d) the creation of record keeping and evaluation tools; e) the implementation of targeted community outreach to primarily Hispanic and African-American audiences.

### ***DISTRICT OF COLUMBIA - 2003***

- The Brief Services Unit was integrated into the LCE office, and appointments can now be made by the Hotline for BSU personnel. Communication has been facilitated and the Hotline Follow-Up Project is operational through BSU, as well. A full time attorney is now employed to supervise the paralegal and volunteers. Twenty new volunteers were recruited and trained.
- The intake system initiated in early 2002 was modified several times to improve efficiencies and reduce unnecessary communications. Hotline attorneys are performing intake functions when intake staff is unavailable.
- Modification was made to the database which now permits hotline attorneys to access a real time list of callers awaiting responses. This has eliminated the need for burdensome communications between intake staff and hotline attorneys.
- Volunteers were used to monitor incoming calls, in order to assure that callers are able to reach intake personnel. Adjustments were made throughout the year to maximize the number of calls handled.
- Some callers were referred to an independent contract attorney when hotline attorneys were on vacation or ill, to assure callbacks within 24 hours.
- Self-Help Offices continue to refer clients to the Hotline intake system where legal issues are involved.

### ***GEORGIA – 2003***

- The hotline completed our transition to a web-based version of our database. This has enabled staff to work off-site more easily. Last year, we instituted a volunteer project to gather data on client satisfaction and to help us assess HL effectiveness and the need for additional follow up on closed cases. We found that approximately 20% of our cases needed additional follow up in order to fully address the client's concern or problem.
- We continued our collaboration with Adult Protective Services and Georgia Cares staff, to better address problems related to elder abuse and prescription drug issues. We also continued to screen callers for other benefits. We began implementation of a Mobile Law Unit project, an LSC funded initiative that complements the hotline, and enables staff to provide HL services on-site in locations where our clients congregate. HL staff attended and made presentations at a number of national and state conferences. The Georgia HL also participated in AARP's Hotline norms project, by providing HL data on selected indicia.

# Senior Legal Hotlines Annual Report

## SIGNIFICANT EVENTS

October 1, 2002 – September 30, 2003

### ***Hawaii - 2003***

- Our major accomplishment was that we increased our productivity. Without any increase in either funding or staffing, we increased the cases handled by 3% and calls handled by 5%. This is on top of a nearly 11% increase in cases handled in 2002 over 2001, also without any increase in funding or staffing. We continued our outreach efforts, giving 10 presentations to senior-specific groups and 35 other presentations at which seniors were present, and attending and giving presentations at 20 fairs and events, such as the Senior Fair, Family Day, VA Standdown for Homeless Veterans and the Walk for Diabetes.

### ***IDAHO - 2003***

- The Idaho Legal Aid Services Senior Legal Hotline has been well-received throughout the state. Brochures in English and Spanish have been distributed widely as well as cards and posters.

### ***KENTUCKY - 2003***

- Health care issues dominated the services provided by the Legal HelpLine in the past year, accounting for nearly 33% of total calls. The Kentucky Medicaid program issued several waves of new regulations, creating a huge need for information and assistance. The HelpLine coordinated a rapid response team of legal services programs, Title III providers and the private bar to respond to changes in Medicaid regulations. The team developed materials, conducted continuing legal education programs, and created several hundred QIT trusts to help Medicaid recipients maintain eligibility under a change in the regulations enacted to comply with a federal ruling.
- The HelpLine continued to build collaborative relationships with the legal service and Title III providers in the state. Informal agreements exist with all the LSC-funded programs to refer clients to one another based on client need and the provider's capacity. (The LSC-funded programs are the Title III legal service providers in most areas of the state.) The result of this collaboration has been improved client access to services and the ability of the programs to balance their workloads. Clients who need advice only are transferred by the LSC programs to the HelpLine, and the HelpLine transfers to the LSC programs clients whose needs exceed the capacity of the HelpLine to provide assistance, or who need to see an advocate face to face to receive meaningful advice. The end result is that more clients are able to receive the assistance that they need.
- With the help of five law student volunteers the HelpLine conducted a series of community outreach "Wills Clinics" over the summer. The clinics targeted under-served areas of the state, some identified by the Title III programs, to prepare simple wills, living wills and

# Senior Legal Hotlines Annual Report

## SIGNIFICANT EVENTS

October 1, 2002 – September 30, 2003

powers of attorney for low-income and isolated seniors. A handbook for organizing community outreach clinics was developed as part of this project, and students are being recruited to continue this program, which provides an excellent opportunity to promote the HelpLine.

- HelpLine staff attorney David Godfrey made 23 presentations to community groups and professionals on law and aging during the year. In October 2002 he presented workshops on planning for incapacity and community outreach at the National Aging and Law Conference. He did presentations for two different Area Agencies on Aging (Title III funded) for their family caregiver programs. He presented three trainings for various state agencies and six programs for families of residents in nursing homes, with several of these in collaboration with the long term care ombudsman offices. He is active in the speaker's bureau for the Alzheimer's Association.
- There were no changes in paid direct-service staff for the HelpLine during the year. Due to budget cuts at Access to Justice Foundation, the position of office manager was eliminated, resulting in a redistribution of duties in the office, with no significant impact on the HelpLine. The senior volunteer that had been with the HelpLine for several years is no longer able to make it into the office and was forced to retire. An effort is currently underway to recruit a new senior. Five temporary law student volunteers worked with the HelpLine over the year, making possible the organization of community outreach clinics.
- As the grant year ended the Access to Justice Foundation was preparing to relocate its offices. The office move was completed in October of 2003. As a result of the relocation the HelpLine has larger offices, a more efficient use of space, and improved access for the handicapped. The relocation resulted in a very slight reduction in the cost of office space and a dramatic improvement in working conditions.

### **MARYLAND - 2003**

- Partnership with the Asian Pacific American Legal Resource Center (APALRC)
  - Developed and Began Implementing Outreach Plan
  - Created Customized Outreach Brochure
  - Conducted Preliminary Training of Key APALRC Staff on the Use of Centralized Intake Software
  - Updated Technoliteracy Brochures for APALRC Outreach
  - APALRC trained a class of 30 community members in legal interpretation, of which 10 were selected to become APALRC legal interpreters
  - In addition to their general hotline number, APALRC established four dedicated hotline numbers in four Asian languages: Chinese, Korean, Hindi/Urdu, and Vietnamese.
  - With assistance from LAB and MLAN, APALRC trained more than 45 Law Student Volunteers to Staff the Legal Hotline at APALRC

## Senior Legal Hotlines Annual Report

### SIGNIFICANT EVENTS

October 1, 2002 – September 30, 2003

- Through our Partnership with the Maryland Legal Assistance Network (MLAN), the People's Law Library Website ([www.Peoples-Law.org](http://www.Peoples-Law.org)) was Significantly Redesigned with Seniors in Mind
  - Creation of On-Line Guide of Private and Public Pharmaceutical Programs
  - New Elder Abuse Section created as Part of Domestic Violence Website Redesign
  - Created New Web Section on Senior Credit or Collection and Income Protection Program (SCCIPP) Resources
  - New Approach to Health Care-Related Resources for Elders on the Web
  - Creation of New Section on Housing Legal Resources
  - Published Multi-Language Gateway to Legal Resources and Information
- New Developments on the Hotline
  - Installed new NEC Telephone System with Queue Features
  - Opened Hotline Hours to One Evening per Week (Thursdays, 6 – 8 p.m.)
  - Installed Practice Manager (new Case Management Software) and Trained Entire Hotline Staff on its Use
  - Partnered with Education-Based Latino Outreach (EBLO) to Publicize Services Available to Spanish-Speaking Seniors
  - Developed Templates for Incorporation into Practice Manager for Use in the Senior Credit or Collection and Income Protection Program (SCCIPP)
  - Created a Model Law Outline to Pattern the Development of Other Outlines to be Used in the Centralized Intake System
  - New Coordination Plan Underway with the Maryland Office of the Attorney General

### **MAINE - 2003**

- Approximately half of our cases during this period involved consumer or housing issues. In addition, the majority of consumer cases involved debt collection.
- The Hotline Managing Attorney revised the questionnaire used for a previous outcomes study after discovering that it was virtually impossible to compile the data collected during that study.
- Using the new questionnaire, we conducted another outcomes study. The most recent study involved consumer cases. The Hotline Managing Attorney will be analyzing the consumer outcomes data during the next reporting period.
- The Legal Access Project Director established working relationships with several community health center directors.
- The Legal Access Project Director and Hotline Managing Attorney, with assistance from a literacy consultant, produced "Know Your Rights," a series of 10 pamphlets about issues affecting the elderly, such as wills, powers of attorney, and MaineCare (Medicaid). Most of the pamphlets are written at a 5th or 6th grade reading level. Know Your Rights will be

# Senior Legal Hotlines Annual Report

## SIGNIFICANT EVENTS

October 1, 2002 – September 30, 2003

distributed by at least 13 community health centers. Most of the community health centers are in underserved, rural areas.

- The Legal Access Project Director produced a Legal Check-Up form that will also be distributed by the community health centers.
- The Hotline Managing Attorney was out on medical leave for 2 months and then returned to work on a part-time basis for over 3 months.

### ***MICHIGAN - 2003***

- During 2003, our senior attorney faced severe medical problems and had to reduce his work during that period; this led to a reduction in the number of clients served during the year.
- We completed our first draft of the Debtor Protection Kit, a resource for advocates and seniors dealing with debt problems.
- We held a training for the state legislative staff on senior issues and prepared testimony on proposed legislation that affected our clients.
- We strengthened our law student volunteer program.
- Several of our publications have been translated into Spanish to reach a broader audience.
- Our presence in the community has been increased through senior fairs and expos.

### ***NEW HAMPSHIRE - 2003***

- During Fiscal 2003, Velma McClure, the Advice Line managing attorney, left the Advice Line to work on another project within our agency. Attorney Cheryl Driscoll replaced Attorney McClure as managing attorney and two staff attorneys moved into the Advice Line to handle calls.
- The most significant accomplishment for the Senior Legal Advice Line in Fiscal 2003 was receiving a \$90,000 grant from the Administration of Aging to start a consumer law project for seniors. We were officially notified of the award at the end of September and the grant period began on October 1, 2003. We sought funding for a consumer law project due to the large number of calls we have received over the years from seniors with consumer issues.

### ***NEW MEXICO - 2003***

With Funding from the NM Legal Service Commission, LREP established and is currently implementing the Community Outreach Pilot Program. The program has contracted with three local contract attorneys who are responsible for providing enhanced LREP outreach services to a specific geographic region. The enhanced services include the following:

# Senior Legal Hotlines Annual Report

## SIGNIFICANT EVENTS

October 1, 2002 – September 30, 2003

- ❑ Developing a community outreach plan tailored to each specific geographic region including promotion of the LREP program among members of the public, service providers and attorneys within the region;
- ❑ Work with LREP referral staff to expedite referrals in their geographic region;
- ❑ Conduct a minimum of six LREP mini-workshops within the rural areas of their geographic region;
- ❑ Assist LREP with the regular scheduled workshops and clinics conducted within their geographic region;
- ❑ Assess local issues and provide LREP with information and feedback on the legal needs of the elderly not currently being addressed.

### **OHIO - 2003**

- After 6.5 years with Pro Seniors' Legal Hotline, as a Hotline Attorney, a Hotline Co-Manager and Hotline Manager, Cindy Marsland has left the Hotline in order to move to Long Island, New York. Cindy's replacement is Pro Seniors' Managing Attorney, Tom Bedall, who has been with Pro Seniors since 1993.
- In other personnel changes, Pro Seniors has added another paid attorney and an additional volunteer attorney to the Hotline staff in FY 2003.
- The Ohio Hotline is in its second year as a sub-grantee of the Legal Hotline for Michigan Seniors' Michigan Pension Rights Project. The project is a wonderful add-on to our general Hotline work and allows our Hotline Attorneys to develop an expertise in a complex area of law. They also enjoy seeing the results of spending more time on individual cases.
- Pro Seniors' Legal Hotline for Older Ohioans now has a web presence at [www.proseniors.org](http://www.proseniors.org). FY 2003 also saw major progress made in updating and posting to our web site the 50 pamphlets on various elder-law topics that Pro Seniors makes available to Ohio seniors.

### **SOUTH CAROLINA – 2003**

- The biggest achievement of the grant was working with our forty-one (41) grant partners in making the SOS hotline a reality in South Carolina. Out of our initial contact with our grant partners and the dissemination of our SOS hotline brochure, outreach in 28 senior citizen sites throughout South Carolina was provided for 673 senior citizens.
- On July 24, 2003, an elder law training was conducted for 44 private attorneys. The 44 private attorneys agreed to assist in taking elder law cases pro bono in lieu of paying for the training. The attorneys in attendance represented 16 out of 46 counties or roughly 35% of the State. This will allow the hotline to refer more cases to attorneys for representation.

## Senior Legal Hotlines Annual Report

### SIGNIFICANT EVENTS

October 1, 2002 – September 30, 2003

- An elder law training was conducted for the attorneys of the South Carolina Centers for Equal Justice. The training will allow more cases referred to the local legal services centers being accepted for representation.
- As a result of the hotline's work with its partnering agencies and the community outreach provided, the number of callers increased 61% from the first six months the hotline was in operation.
- The one trend our data shows is that the majority of our hotline callers have problems in the area of wills/estates; consumer; public benefits and family.

### WASHINGTON - 2003

- CLEAR\*Sr used a shared leadership model in which different staff members took on responsibility for implementation of different portions of the project. Joan Kleinberg, Director of CLEAR, supervised CLEAR\*Sr staff and project plans. Project Coordinator Ellie Lende administered consumer legal needs checkups, client surveys, and performed general administrative tasks to assist in project goals. In addition to client advice, brief service and referral, CLEAR\*Sr attorneys Jim Kerney and Xana Moore-Wulsin handled issue spotting trainings and outreach presentations.
- Project tasks during this period proved both challenging and rewarding. Daily hotline responsibilities were performed in tandem with the following on-going efforts:
- CLEAR\*Sr advocates provided training sessions to senior social service providers to spot consumer issues and facilitate referral of seniors with these problems to CLEAR\*Sr. Participants regularly expressed gratitude for the quality of the trainings as well as for the resources for future reference. By making themselves personally available to seniors advocates, CLEAR\*Sr staff fielded regular follow-up e-mails and/or phone calls from advocates with general legal questions concerning their clients. CLEAR\*Sr advocates were often able to give enough information to lay advocates for them to solve the seniors' problems on their own.
- Provided training and web-based resources to volunteer attorneys, lay advocates and senior service providers: CLEAR\*Sr staff created a stronger network with other consumer-based advocates through increased presence within senior communities. CLEAR\*Sr field efforts became a valuable resource for other senior advocates in the area of consumer issues, as well as for seniors directly via presentations at various senior centers.
- Created educational/self-help brochures in the consumer area: CLEAR\*Sr and other NJP staff wrote and disseminated several consumer self-help brochures. Six of these brochures have been posted to our NJP web-site and are included in our list of brochures available for all NJP clients. Three mini consumer articles were written by CLEAR\*Sr staff and submitted to several senior centers and to editors for publication in newsletters.
- CLEAR\*Sr advocates made concerted efforts to focus brief services in our targeted areas of housing, health and consumer safety. As time progressed, advocates became vastly more

# Senior Legal Hotlines Annual Report

## SIGNIFICANT EVENTS

October 1, 2002 – September 30, 2003

proficient in consumer legal matters. We learned, however, that many consumer legal issues, such as predatory loans, are complex and require litigation for resolution, far beyond the reach of hotline brief services. Advocates showed commitment to rural and minority seniors through targeted outreach.

- Administered holistic consumer legal needs “check-ups” to all interested senior callers and measured outcome surveys to 10% of senior callers.

### **WEST VIRGINIA - 2003**

- Our Title IV grant ended (we had a no-cost extension last year), and we decided to focus on funding our program through renewable money, rather than demonstrations. We are expecting to tighten our budget belts for the near future, so we were particularly happy to get \$6000 proceeds from the 3rd Annual Ambulance Chase, a 5k race that WVU law students put together as a fundraiser for us.
- We made significant progress in the slow and steady work of building meaningful connections with local community organizations to give us the local presence we lack as a statewide centralized program. Financial exploitation of seniors, particularly that which is perpetrated by people in positions of trust, rose to the top as a priority for our services. To expand our capacity to do that work, both individual cases and systemically, we identified and connected with good partners (AARP, US Atty, State Atty General, aging network, APS, domestic violence coalition, LTC ombudsmen) and have begun mapping out the issues and clarifying our respective roles.
- This year was our staff attorney's 2nd year with us, and her increased level of expertise enabled her to do significantly more and better brief services this year than last year.

### **WYOMING - 2003**

We are seeing:

- More senior income (SSA benefits) garnished for child support and student loans.
- More requests for bankruptcy services, particularly when one spouse passes away.

# Senior Legal Hotlines Annual Report

**% Total Case Types Reported  
Kansas Legal Services  
October 1, 2002 – September 30, 2003**

