

SENIOR LEGAL HOTLINES

ANNUAL REPORT

OCTOBER 1, 1999 - SEPTEMBER 30, 2000

Compiled by the
Legal Hotline Technical Assistance Project
A.A.R.P. FOUNDATION

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October 1, 1999-September 30, 2000

Legal Hotlines

A total of 22 senior legal hotlines reported their statistics to the AARP Foundation. The number of statewide legal hotlines dedicated to the service of seniors numbered 21 in 2000. 19 states, the District of Columbia and the Commonwealth of Puerto Rico all had statewide senior legal hotlines. (The Senior Legal Hotline in California serves only Northern California because of the size of that state's population). The Arizona Elder Law Line resumed statewide operation after a three year hiatus. The Arizona legislature created a state elder law hotline funding provision for the State Supreme Court's Access to Justice Project. The Legal Hotline for Older Floridians, due to funding issues, now handles statewide calls only for seniors who speak Spanish or Creole. It continues its general service for the over-60 population of Miami-Dade county. The Maryland Senior Legal Hotline starting accepting calls in Spring 2000. The Administration on Aging Title IV funded one new hotline and four existing hotlines for 2001. The new hotline will be housed at Legal Services Organization of Indiana. Start-up is anticipated in summer 2001. Title IV continuation grants were awarded to the Senior Legal Hotline in Hawaii, Georgia Senior Legal Hotline, Legal Hotline for Older Iowans, and CLEAR*Sr in Washington.

This year the 22 senior hotlines handled almost 83,000 calls and closed almost 63,000 cases. Over 51,000 households were served.

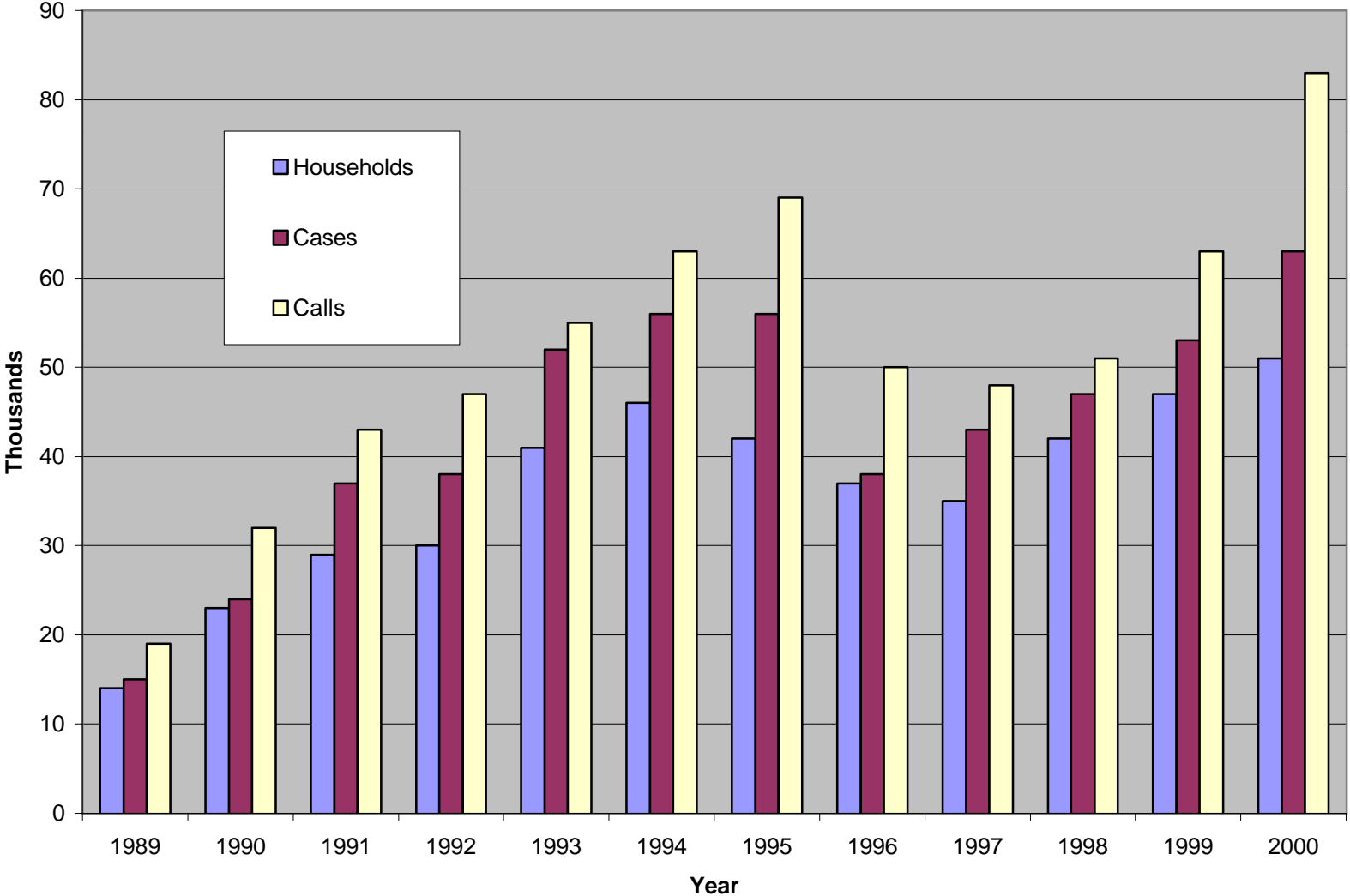
The Pennsylvania Hotline continues to be operated by Tele-Lawyer, Inc. under a contract with AARP. The goal of this experiment is to see whether the free calls the hotline will continue to handle for clients under 200% of poverty will be supported by the \$3.00 per minute charge via a 900 telephone number or credit card, to higher income callers. Results of the past year of the Tele-Lawyer contract indicate that only approximately 6% of the hotline's \$58,000 operating budget was supported by the fees collected. A marketing effort at the end of calendar year 2000 is expected to result in an increase in revenues for 2001. The experiment will then be re-evaluated.

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, the Legal Hotline Bulletin, and collects hotline related documents for cataloging at the National Center on Poverty Law Legal Hotline Technical Assistance Library. Over 200 documents are now available from the library.

The Project manages an interactive Technical Assistance email group at legalhotlines@egroups.com. Technical assistance queries posted there are answered by Project Staff as well as other experienced legal hotline managers.

This year the Project compiled an update of the State-by-State Directory of Legal Hotlines. The Directory describes over 150 legal hotline programs nationwide. The number of new programs located was much larger than expected, indicating the depth of acceptance of the hotline delivery system among legal services providers and the great extent to which the model is continuing to be implemented by programs across the nation. The directory enables programs to quickly determine if a caller may have his question or problem addressed by a hotline in another county or state, as needed. It is also a resource for hotline managers who may wish to locate a program with similar populations, software, funding, or other matters, to discuss issues of mutual interest and share information. A searchable version of the Directory is located at www.equaljustice.org/hotline1 The Legal Hotline Technical Assistance Project can be reached at 954-472-0997 or rose99@mediaone.net.

Households, Cases, Calls Growth By Year 1989 - 2000



PRODUCTIVITY REPORT
October 1, 1999 - September 30, 2000
Page 1

	AZ	CA	DC	FL	GA	HI	IA	KS	KY	MD*	ME	MI
<i>Households Year Total</i>	3,200	3,833	1,761	790	3,644	951	2,014	3,212	1,332	372	2,934	4,002
A Cases Year Total	4,000	4,687	2,624	974	3,709	1,654	2,163	3,497	1,574	465	3,342	4,714
B Calls Year Total	5,160	9,981	3,140	1,245	9,782	2,878	2,163	3,645	1,749	600	4,311	5,610
C: Avg FTE Paid Staff		4.93	1.30	1.45	3.50	1.50	2.05	0.30	2.00	0.65	4.00	2.00
D Avg FTE Volunteers		0.59	-	0.50	1.00	0.25	0.06	1.00		-	-	0.25
E: Total FTE (C+D)		5.52	1.30	1.95	4.50	1.75	2.11	1.30	2.00	0.65	4.00	2.25
F:% Paid Staff Time (C/E)		89.31%	100.00%	74.36%	77.78%	85.71%	97.16%	23.08%	100.00%	100.00%	100.00%	88.89%
G:% Volunteer Time (D/E)		10.69%	0.00%	25.64%	22.22%	14.29%	2.84%	76.92%	0.00%	0.00%	0.00%	11.11%
A' Cases Year Total (not AZ)		4,687	2,624	974	3,709	1,654	2,163	3,497	1,574	465	3,342	4,714
Cases per FTE/year (A/C)		951	2,018	672	1,060	1,103	1,055	11,657	787	715	836	2,357
*Avg Cases/hr Paid Advocates <i>A'/(2000*C)</i>		0.48	1.01	0.34	0.53	0.55	0.53	5.83	0.39	0.36	0.42	1.18
B' Calls Year Total (not AZ)		9,981	3,140	1,245	9,782	2,878	2,163	3,645	1,749	600	4,311	5,610
Calls per FTE/year(B/C)		2,025	2,415	859	2,795	1,919	1,055	12,150	875	923	1,078	2,805
*Avg Calls/hr Paid Advocates <i>B'/(2000*C)</i>		1.01	1.21	0.43	1.40	0.96	0.53	6.08	0.44	0.46	0.54	1.40
*H: Gross Hotline Cost		\$ 262,437		\$ 48,456	\$ 160,500	\$ 44,475	\$ 176,787	\$ 62,000		\$ 241,109	\$ 275,000	\$ 231,387
*Gross Cost/ Case (H/A)		\$ 55.99		\$ 49.75	\$ 43.27	\$ 26.89	\$ 81.73	\$ 17.73		\$ 518.51	\$ 82.29	\$ 49.09
*Gross Cost/ Call (H/B)		\$ 26.29		\$ 38.92	\$ 16.41	\$ 15.45	\$ 81.73	\$ 17.01		\$ 401.85	\$ 63.79	\$ 41.25
<i>Figures in Italics are estimates based on ratio of Households = 0.8*Cases; Calls = 1.29*Cases (the average of those hotlines which gave all three statistics).</i>												
<i>*Gross Cost does not include in-kind volunteer support in CA=\$56,118; in IA=\$47,870; in WV=\$50,341</i>												
<i>*Avg based on 40 hours per week for 50 weeks per FTE including hours that attorneys are working at other tasks (except TX with 4,083.2 total actual attorney hours for year)</i>												
<i>*MD New: open June-September 2000</i>												
<i>*OH Estimate: Calls</i>												
<i>*TX counts new cases only</i>												
<i>*Total Gross Hotline Cost, and Avg Gross Cost per case and per call are based on 16 hotlines reporting and exclude MD because MD's report includes startup costs.</i>												

PRODUCTIVITY REPORT
October 1, 1999 - September 30, 2000
Page 2

	MS	NH	NM	OH*	PA	PR	TN	TX	WA	WV	TOTALS	AVERAGE
												*(total/22)
<i>Households Year Total</i>	291	1,444	2,605	4,632	3,248	1,222	1,645	5,229	2,059	893	51,313	2,443.48
A Cases Year Total	329	1,805	4,132	5,545	3,458	1,528	1,645	7,661	2,574	893	62,973	2,998.71
B Calls Year Total	373	2,347	4,220	5,989	3,512	1,971	1,645	8,931	2,830	893	82,975	3,951.19
												(total/21)
C: Avg FTE Paid Staff	1.00	2.00	3.10	2.90	0.36	4.00	2.00	2.04	1.50	1.50	44.08	2.10
D Avg FTE Volunteers	-	-	-	0.07	-	-	-	-	-	-	3.72	0.18
E: Total FTE	1.00	2.00	3.10	2.97	0.36	4.00	2.00	2.04	1.50	1.50	47.80	2.28
F:% Paid Staff Time	100.00%	100.00%	100.00%	97.64%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	1933.93%	92.09%
G:% Volunteer Time	0.00%	0.00%	0.00%	2.36%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	166.07%	7.91%
A' Cases Year Total (not AZ)	329	1,805	4,132	5,545	3,458	1,528	1,645	7,661	2,574	893	58,973	2,808.24
Cases per FTE/year (A/C)	329	903	1,333	1,912	9,606	382	823	3,755	1,716	595	1,338	1,338
*Avg Cases/hr Paid Advocates	0.16	0.45	0.67	0.96	4.80	0.19	0.41	1.88	0.86	0.30	0.67	0.67
<i>A'/(2000*C)</i>												
B' Calls Year Total (not AZ)	373	2,347	4,220	5,989	3,512	1,971	1,645	8,931	2,830	893	77,815	3,705.48
Calls per FTE/year(B/C)	373	1,174	1,361	2,065	9,756	493	823	4,378	1,887	595	1,765	1,765
*Avg Calls/hr Paid Advocates	0.19	0.59	0.68	1.03	4.88	0.25	0.41	2.19	0.94	0.30	0.88	0.88
<i>B'/(2000*C)</i>												(total/16)
*H: Gross Hotline Cost		\$ 149,158	\$ 172,194	\$ 203,918	\$ 58,000		\$ 185,546	\$ 314,797	\$ 175,091	\$ 206,508	\$ 2,726,254	\$ 170,390.88
*Gross Cost/ Case		\$ 82.64	\$ 41.67	\$ 36.78	\$ 16.77		\$ 112.79	\$ 41.09	\$ 68.02	\$ 231.25		\$ 52.38
*Gross Cost/ Call		\$ 63.55	\$ 40.80	\$ 34.05	\$ 16.51		\$ 112.79	\$ 35.25	\$ 61.87	\$ 231.25		\$ 38.96
<i>Figures in Italics are estimates based on ratio of Households = 0.8*Cases; Calls = 1.29*Cases (the average of those hotlines which gave all three statistics).</i>												
<i>*Gross Cost does not include in-kind volunteer support in CA=\$56,118; in IA=\$47,870; in WV=\$50,341</i>												
<i>*Avg based on 40 hours per week for 50 weeks per FTE including hours that attorneys are working at other tasks (except TX with 4,083.2 total actual attorney hours for year)</i>												
<i>*MD New: open June-September 2000</i>												
<i>*OH Estimate: Calls</i>												
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<i>*Total Gross Hotline Cost, and Avg Gross Cost per case and per call are based on 16 hotlines reporting and exclude MD because MD's report includes startup costs.</i>												

CASE HANDLERS
Full Time Equivalent (FTE) and Number (#)
October 1, 1999 - September 30, 2000
Page 1

	CA	DC	FL	GA	HI	IA	KS	KY	MD	ME	MI	MS	NH	NM	OH	PA	PR	TN	TX	WA	WV	TOTAL
<u>Avg FTE Paid</u>																						
Attorneys	2.13	1.30	1.45	2.00	1.00	1.80	0.30	2.00	0.60	3.00	2.00	1.00	2.00	2.50	2.40	0.36	4.00	2.00	2.04	1.50	1.50	36.88
Paralegals	2.80			1.50	0.50					1.00				0.60							1.00	7.40
Law Students						0.25			0.05												2.00	2.30
<i>Other: intake</i>															0.50							0.50
<i>volunteer</i>																						
<i>Clerical</i>																			0.50			0.50
<i>support staff (includes Title V)</i>	1.20																					1.20
<i>social workers/students</i>																						
<i>intake coordinator</i>													0.77	0.60		0.16						1.53
<u>Avg FTE Volunteers</u>																						
Attorneys	0.55			0.50		0.06	1.00				0.25				0.07							2.43
Paralegals	0.04																					0.04
Law Students			0.50	0.50	0.25																	1.25
<i>Other: intake</i>														0.50	0.40							0.90
<i>volunteer</i>					0.25																	0.25
<i>support staff</i>	0.17																					0.17
<i>social workers/students</i>	0.40																					0.40
<u># Paid (year end)</u>																						
Attorneys	4	6	2	4	8	2	1	2	9	5	5	1	2	3	5	1	4	4	7	2	2	79
Paralegals	3			3	13					1				1								21
Law Students						-			-													
<i>Other: intake</i>															1							1
<i>support staff</i>	3																					3
<i>social workers/students</i>																						
<i>intake coordinator</i>																2						2
<u># Volunteers (year end)</u>																						
Attorneys	13			3		1	3				1				2						2	25
Paralegals	2																					2
Law Students	1				1																	2
<i>Other: intake</i>														2	1							3
<i>Clerical</i>																				1		1
<i>volunteer</i>					1																	1
<i>clerical</i>																						
<i>support staff</i>	2																					2
<i>social workers/students</i>	4																					4

CASE HANDLERS
Full Time Equivalent (FTE) and Number (#)
October 1, 1999 - September 30, 2000
Page 2

	CA	DC	FL	GA	HI	IA	KS	KY	MD	ME	MI	MS	NH	NM	OH	PA	PR	TN	TX	WA	WV	TOTAL
# Paid-Added during year																						
Attorneys	2		1		2	1			4	1	2							1			1	15
Paralegals	1			3	3																	7
Law Students						1			1												1	3
<i>Other: intake</i>																						
support staff	5																					5
social workers/students																						
# Volunteers-Added during year																						
Attorneys	10										1				2				2			15
Paralegals	2																					2
Law Students			1	1	3														1			6
<i>Other: intake</i>															2							2
volunteer					3																	3
support staff	1																					1
social workers/students	5																					5
# Paid-Dropped during year																						
Attorneys			1	1	2	1			1		2				1				3			12
Paralegals					2																	2
Law Students						1			1												1	3
<i>Other: intake</i>																						
support staff (Title V)	2																					2
social workers/students																						
# Volunteers-Dropped during year																						
Attorneys	4						1												1			6
Paralegals	1																					1
Law Students			1	1	3															1		6
<i>Other: intake</i>															2							2
volunteer					1																	1
support staff	1																					1
social workers/students	5																					5

COMPARISON OF FY 1999 AND FY 2000
October 1, 1998 - September 30, 1999
and
October 1, 1999 - September 30, 2000

		COMPARISON OF 1999 AND 2000 <i>*new hotline*</i>												
		AZ	CA	DC	FL	GA	HI	IA	KS	KY	*MD*	ME	MI	Page Total
Households served	99		2,871	3,517	1,130	1,690	2,030	2,114	2,819	337	new	2,755	3,160	22,423
	00	3,200	3,833	1,761	790	3,644	951	2,014	3,212	1,332	372	2,934	4,002	28,045
Cases handled	99		3,240	4,068	1,180	1,715	2,030	2,114	3,108	337	new	3,406	4,740	25,938
	00	4,000	4,687	2,624	974	3,709	1,654	2,163	3,497	1,574	465	3,342	4,714	33,403
Calls handled	99		6,480	4,798	1,270	4,437	2,030	2,114	3,554	378	new	6,252	5,343	36,656
	00	5,160	9,981	3,140	1,245	9,782	2,878	2,163	3,645	1,749	600	4,311	5,610	50,264
Services delivered	99		3,190	5,412		3,257		2,688	3,588	878	new	2,627	1,954	23,594
Not Collected in 2000	00													
Average calls/hr	99		0.86	1.36	2.05	3.50		1.33	4.25	0.31	new	0.76	2.67	
	00		1.01	1.21	0.43	1.40	0.96	0.53	6.08	0.44	0.46	0.54	1.40	
Average cases/hr	99		0.43	1.15	2.20	1.30		1.33	3.71	0.27	new	0.42	2.37	
	00		0.48	1.01	0.34	0.53	0.55	0.53	5.83	0.39	0.36	0.42	1.18	
Total cost	99		\$ 200,000		\$ -	\$ 154,274	\$ -	\$ 156,248	\$ 85,612	\$ 35,560	new	\$ 247,797	\$ 238,796	\$ 1,118,287
	00		\$ 262,437		\$ 48,456	\$ 160,500	\$ 44,475	\$ 176,787	\$ 62,000	\$ -	\$ 241,109	\$ 275,000	\$ 231,387	\$ 1,261,042
Total project-generated income	99		\$ 6,327		\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,000	new	\$ -	\$ 47,522	\$ 68,849
(Reduced fee panel, donations and fees)	00		\$ 4,381		\$ 1,456	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12,000	\$ 17,837
Gross cost/case	99		\$ 61.73		\$ -	\$ 90.00	\$ -	\$ 73.91	\$ 27.55	\$ 105.52	new	\$ 73.00	\$ 50.38	
	00		\$ 55.99		\$ 49.75	\$ 43.27	\$ 26.89	\$ 81.73	\$ 17.73	\$ -	\$ 518.51	\$ 82.29	\$ 49.09	
Net cost/case	99		\$ 59.78		\$ -	\$ 34.00	\$ -	\$ 73.91	\$ 24.09	\$ 94.07	new	\$ 73.00	\$ 40.35	
	00		\$ 55.06		\$ 48.25	\$ 43.27	\$ 26.89	\$ 81.73	\$ 17.73	\$ -	\$ 518.51	\$ 82.29	\$ 41.25	
<i>Figures in Italics are estimates based on ratio of Households = 0.8*Cases; Calls = 1.29*Cases</i>														
<i>*Gross Cost does not include in-kind volunteer support in CA=\$56,118; in IA=\$47,870; in WV=\$50,341</i>														
<i>*PA The total cost was a special contractual rate for AARP which includes receptionist, phone carrier and attorney services and may not be available to other programs.</i>														
<i>It does not include TeleLawyer overhead such as rent and utilities.</i>														
<i>*Total Gross Hotline Cost, Avg Gross Cost/case and Avg Net cost/case are based on # of hotlines reporting and, in 2000, exclude MD because MD's report includes startup costs.</i>														
<i>*In 1999 actual # hrs were reported. In 2000 # hrs based on 40 hours per week for 50 weeks per FTE including hours that attorneys are working at other tasks (except TX with 4,083.2 total actual attorney hours for year)</i>														

COMPARISON OF FY 1999 AND FY 2000
October 1, 1998 - September 30, 1999
and
October 1, 1999 - September 30, 2000

COMPARISON OF 1999 AND 2000, page 2													
		MS	NH	NM	OH*	PA	PR	TN	TX	WA	WV	Page Total	TOTALS
Households served	99	1,073	1,249	2,040	4,722	4,566	2,535	1,307	3,852	2,451	551	24,346	46,769
	00	291	1,444	2,605	4,632	3,248	1,222	1,645	5,229	2,059	893	23,268	51,313
Cases handled	99	1,083	1,249	2,549	5,014	4,867	2,535	1,307	5,029	2,451	551	26,635	52,573
	00	329	1,805	4,132	5,545	3,458	1,528	1,645	7,661	2,574	893	29,570	62,973
Calls handled	99	1,080	1,611	2,204	5,014	1,730	3,000	1,307	5,454	3,883	702	25,985	62,641
	00	373	2,347	4,220	5,989	3,512	1,971	1,645	8,931	2,830	893	32,711	82,975
Services delivered	99	2,294	1,864		5,544	6,729	3,497	1,307	8,560	556	551	30,902	54,496
Not Collected in 2000	00												
Average calls/hr	99			0.30	1.77	1.48	1.75	0.78	1.84	2.85	0.96		1.30
	00	0.19	0.59	0.68	1.03	4.88	0.25	0.41	2.19	0.94	0.30		0.88
Average cases/hr	99		0.57	0.34	1.77	1.52	1.48	0.78	1.70	1.80	0.75		1.01
	00	0.16	0.45	0.67	0.96	4.80	0.19	0.41	1.88	0.86	0.30		0.67
Total cost	99		\$ 107,658	\$ -	\$ -	\$ 157,704		\$ 190,000	\$ -	\$ 132,656	\$ -	\$ 588,018	\$ 1,706,305
	00		\$ 149,158	\$ 172,194	\$ 203,918	\$ 58,000		\$ 185,546	\$ 314,797	\$ 175,091	\$ 206,508	\$ 1,465,212	\$ 2,726,254
Total project-generated income	99		\$ -	\$ -	\$ -	\$ 28,343		\$ -	\$ -	\$ -	\$ -	\$ 28,343	\$ 97,192
(Reduced fee panel, donations and fees)	00		\$ -	\$ -	\$ 2,558	\$ 3,500		\$ -	\$ 3,242	\$ -	\$ 400	\$ 9,700	\$ 27,537
Gross cost/case	99		\$ 86.20	\$ -	\$ -	\$ 32.40		\$ 145.37	\$ -	\$ 54.12	\$ -		\$ 72.74
	00		\$ 82.64	\$ 41.67	\$ 36.78	\$ 16.77		\$ 112.79	\$ 41.09	\$ 68.02	\$ 231.25		\$ 52.38
Net cost/case	99		\$ 86.20	\$ -	\$ -	\$ 26.58		\$ 145.37	\$ -	\$ 54.12	\$ -		\$ 64.68
	00		\$ 82.64	\$ 41.67	\$ 36.31	\$ 16.51		\$ 112.79	\$ 40.67	\$ 68.02	\$ 230.80		\$ 51.86
<i>Figures in Italics are estimates based on ratio of Households = 0.8*Cases; Calls = 1.29*Cases</i>													
<i>*Gross Cost does not include in-kind volunteer support in CA=\$56,118; in IA=\$47,870; in WV=\$50,341</i>													
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<i>*Total Gross Hotline Cost, Avg Gross Cost/case and Avg Net cost/case are based on # of hotlines reporting and, in 2000, exclude MD because MD's report includes startup costs.</i>													
<i>In 2000 # hrs based on 40 hours per week for 50 weeks per FTE including hours that attorneys are working at other tasks (except TX with 4,083.2 total actual attorney hours for year)</i>													

**SENIOR LEGAL HOTLINES
TOTAL COST, FUNDING SOURCES
October 1, 1999 – September 30, 2000**

CALIFORNIA

TOTAL COST\$318,555

FUNDING SOURCES

Administration on Aging.....\$147,020
 Area Agency on Aging\$ 44,198
 Legal Services\$ 19,324
 State Bar\$ 2,398
 Donations\$ 3,501
 Client Fees\$ 440
 Training Events\$ 843
 PUC\$ 1,669
 Selnik\$ 15,878
 Van Loben Foundation.....\$ 3,205
 Wellness Foundation.....\$ 17,819
 Fee for Materials\$ 440
 Unrestricted.....\$ 5,819
 In-Kind Support (volunteers).....\$ 56,188

DISTRICT OF COLUMBIA

TOTAL COST

FLORIDA

TOTAL COST\$ 48,456

FUNDING SOURCES

State Department on Aging.....\$ 7,000
 Legal Services\$ 40,000
 Donations\$ 761
 Client Fees\$ 695

GEORGIA

TOTAL COST\$160,500

FUNDING SOURCES

Administration on Aging.....\$116,850
 Georgia Advocacy Office Grant.....\$ 24,500
 Private Foundations\$ 6,800
 In-Kind Support from State Unit on Aging\$ 12,350

HAWAII

TOTAL COST\$28,500

FUNDING SOURCES

Administration on Aging.....\$14,210
 Legal Services\$14,210

IOWA

TOTAL COST\$224,657

FUNDING SOURCES

Administration on Aging.....\$100,000
 Legal Services\$ 76,787
 In-Kind Support from volunteer lawyers and other
 legal aid programs\$ 47,870

KANSAS

TOTAL COST\$ 62,000

FUNDING SOURCES

State General Fund\$ 31,000
 State Bar Foundation.....\$ 31,000

KENTUCKY

TOTAL COST

MARYLAND

TOTAL COST\$241,109

FUNDING SOURCES

Administration on Aging.....\$ 92,414
 State Bar\$ 3,600
 Maryland Legal Assistance Network –
 matching funds\$23,241
 Legal Aid Bureau\$121,854
 *These figures may be changed, depending upon the
 action taken by the Administration on Aging on our
 recent Budget Modification Request.

MAINE

TOTAL COST\$275,000

FUNDING SOURCES

Administration on Aging.....\$100,000
 State Department on Aging.....*
 Area Agency on Aging*
 Legal Services*
 State Bar*
 * Other funds from * agencies.

**SENIOR LEGAL HOTLINES
TOTAL COST, FUNDING SOURCES
October 1, 1999 – September 30, 2000**

MICHIGAN
TOTAL COST\$231,387

FUNDING SOURCES
Administration on Aging.....\$131,881
State Department on Aging.....\$ 25,000
Area Agency on Aging.....\$ 3,500
IO(L)TA\$ 50,000
Donations\$ 12,000
Other\$ 9,000
In-Kind Support from.....State of Michigan
.....Michigan State Bar Foundation

MISSISSIPPI
TOTAL COST

NEW HAMPSHIRE
TOTAL COST\$149,158

FUNDING SOURCES
Administration on Aging.....\$108,417
State Department on Aging.....\$ 30,000
IO(L)TA\$ 5,741
State Bar – NH Bar Foundation\$ 5,000

NEW MEXICO
TOTAL COST\$172,194

OHIO
TOTAL COST\$203,918

FUNDING SOURCES
State Department on Aging.....\$ 67,508
IO(L)TA\$ 77,497
Donations\$ 75
Client Fees.....\$ 2,483
Community Chest.....\$ 53,075
In-Kind Support (volunteers).....\$ 3,280

PENNSYLVANIA
TOTAL COST\$ 58,000

FUNDING SOURCES
AARP\$ 54,500
Client Fees.....\$ 3,500
This was a special contractual rate for AARP which includes receptionist, phone carrier and attorney services and may not be available to other programs. It does not include TeleLawyer overhead such as rent and utilities.

PUERTO RICO
TOTAL COST

TENNESSEE
TOTAL COST\$185,546

FUNDING SOURCES
Administration on Aging.....\$110,000
Match from many various sources\$ 75,546

TEXAS
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
TOTAL COST\$175,091

FUNDING SOURCES
Administration on Aging.....\$123,980
(includes \$24,000 carryover
from first two years of grant)
State Bar\$ 48,111
AARP Survey Project\$ 3,000

WEST VIRGINIA
TOTAL COST\$256,849

FUNDING SOURCES
Administration on Aging Title IIIB\$ 70,582
AoA Title IV.....\$ 90,000
State Department on Aging
Title IIIB.....\$ 3,261
IO(L)TA\$ 20,000
Donations\$ 400
ABA minigrant.....\$ 7,500
Public Interest Advocates\$ 3,100
Sublease Rent\$ 1,625
In-Kind Support (from pro bono, computer and tech support, donations, help writing publications).....\$ 50,341

SENIOR LEGAL HOTLINES SIGNIFICANT EVENTS October 1, 1999 – September 30, 2000

CALIFORNIA

We have gradually managed to increase our capacity through addition of new staff and recruitment of more volunteers. The numbers are reported on the chart. Additions have included:

- Hiring of a part-time, bilingual (Spanish) paralegal in February 2000 and increasing her to full time in May. This has made a big difference in our ability to serve the Latino community both by phone and through our written material, which has been or will soon be translated.
- Hiring of a permanent staff administrative assistant in February 2000. This has made a tremendous difference in the functioning of our office and in liberating the managing attorney from many of the more routine administrative tasks.
- Hiring of a half-time receptionist in May: we were pleased to put on the payroll a receptionist who had already been with us for two years as a Title V low-income senior trainee.
- Hiring of two part-time attorneys in August. Both had volunteered with the hotline previously, one for four years.
- In addition, we have a current short-term contract with an inactive attorney who is coordinating a major training we will be holding Oct. 23 on California's new Health Care Decisions Law. She is not included in the statistics reported on the chart.
- There has been a significant increase in the number of volunteers and student interns working with us – currently 13 attorneys and nine others. Many were recruited following a one-day "Elder Law Overview" training we offered on April 1.

This growth has put a serious strain on our space. We now have 14 operative computer stations and phone lines in seven rooms – and on several occasions they have all been in use. We may squeeze in as many as three more. Anticipating possible further expansion, we are beginning to explore with our sponsoring organization a possible purchase of long-term lease of the office building next door. If that doesn't happen and we do expand further, we'll have to consider looking at new locations.

Installation of new computers and a new case management system began in September 1999. Completion and full usability have taken far longer than anticipated – it's now more than a year later and we're still waiting for some adjustments that will improve our operation significantly. Such is life in a large but poor legal services program.

Nevertheless, as shown in the statistics, case numbers have increased significantly, and we expect the steady rise in volume to continue. This has been especially true outside of Sacramento, our home county.

We are especially pleased to have concluded agreements with a number of local (OAA Title III-B) legal services providers for joint outreach. Fliers are already being distributed in 15 of the 38 counties we serve outside of Sacramento that have such programs. Negotiations are under way with many of the others, and we will continue working in this direction.

Striving for better coordination with III-B programs has been important not only for more effective outreach and client service but also to pave the way for possible future state funding of legal services for seniors. A bill we submitted in January (officially sponsored by the Congress of California Seniors) would have allocated \$100,000 for a Department of Aging-led task force to study the issue and produce a detailed proposal for subsequent legislation for fully funding a statewide hotline and providing additional help to local programs as well, with a major emphasis on promoting coordination among them. Unfortunately, the bill got lost and died in the Legislature's chaotic final week in late August, but it succeeded in getting the attention of all agencies that would be affected. We are consulting with them and regrouping to continue the effort.

Other projects undertaken in the past year include:

- Development of a referral service for callers who need full representation and whose cases are hard to place through existing channels. We began with a needs assessment survey of III-B providers and area agencies on aging. We reached agreement with an existing statewide referral service that covers some common areas of law and created a new panel for other elder law issues. We held a training for 60 attorneys in the five-county area centered in Chico and are waiting to see how many will sign up. We plan to repeat the program in a number of locations and recruit attorneys by various other means.
- We have created content for a web site (seniorlegalhotline.org) and it should be up and running within a few weeks. Clients will be able to submit questions by e-mail, creating a new means of access to the hotline.

SENIOR LEGAL HOTLINES SIGNIFICANT EVENTS October 1, 1999 – September 30, 2000

- Supported by a grant from the California Public Utilities Commission, we are engaged in educating seniors about electricity deregulation and associated scams. In the process, we are adding our own information about various underutilized discounts available to low-income seniors.
- We continue to offer special services to grandparents dealing with issues of custody or visitation of grandchildren. A small special grant enables us to serve those under 60 as well. We still hope to find funding to expand this work.
- We have been awarded a grant from Sacramento County's tobacco litigation settlement funds for a public education project on issues of planning for disability and long-term care. It will begin in early 2001. Pending proposals may enable us to expand the project to the wider region.
- Having noticed a rash of seemingly hasty and arbitrary revocations of seniors' driver's licenses, we are gathering data on our calls and from local senior legal services programs after putting out a call for information. We are sorting through the cases and will probably seek a meeting with the director of the Department of Motor Vehicles.

DISTRICT OF COLUMBIA

Various hotline attorneys attended training for the Medicare fraud project, bankruptcy, financial abuse and scams perpetrated on the elderly, the District of Columbia tax practitioners' seminars, and professional ethics. All were planning to attend portions of the Law and Aging conference to be held in October. Carol Matthews was invited to participate in a panel discussion of hotline services in Columbus, Ohio, and also attended the NLADA conference in Houston, Texas as a hotline representative.

The D.C. Law Office contracted with Language Line, which provides almost immediate interpretive services in many languages. Hotline attorneys are now trained and using this system for callers who are unable to communicate well in English.

The LCE Database was improved continually over the past year, with the result of a far more user-friendly and efficient system. Many new reports are now available, and the Microsoft Access platform has proved very flexible for our needs. Joe Yao of Information Technology and Elsie Frost who did additional testing this year were particularly helpful.

Since we no longer are charging referral fees through our Reduced Fee Panel, Al Herman suggested that there was no need to keep any new referrals open, and the suggestion was adopted. This has resulted in far fewer open cases, which otherwise would be awaiting referral attorney reports of closure, and additional report generation, research and data entry.

Hundreds of older referral panel cases were closed this year on an individual basis based on reports from referral attorneys. and a final cleanup of even older others for which reports cannot be obtained will be completed within 60 days of this fiscal year-end with the help of Joe Yao of Information Technology.

Carol Matthews continues to produce significant work products for the National Hotline Technical Assistance Project, including a second edition of the State by State Directory of Legal Hotlines and third edition of the Best Practice Tips Guide, as well as several articles for the Legal Hotline Quarterly.

While Al Herman was recovering from major surgery at home, he suggested that he could continue to do the quality review of the daily case masterprint if it could be transmitted to him. As a result of supplying him with an AARP laptop, the printout could be e-mailed to him, and he developed a system of e-mailing hotline attorneys the comments that formerly were noted in a notebook or on memos. The system proved so successful during his six-week absence that it was adopted and improved when he returned to the office. It now also provides additional redundancy to assure that appointments, VLP cases and Home visits are reported to the appropriate D.C. Law Office personnel.

A pilot experiment with a hotline appointment system was tested both part-time and full time for two weeks each, with all hotline attorneys participating. Planning, creation of forms, meetings and implementation were detailed and time consuming for hotline attorneys and support staff. A detailed report was produced, including a number of recommended changes, and awaits a response.

The Hotline continued to receive a limited number of out-of-state referrals from the AARP Membership Division national toll-free number, where questions of a federal or national law were involved, as well as from other AARP Headquarters departments.

It is sad to report that the Hotline has lost the services of John Morris, who, at age 91, has conceded that his health prevents him from continuing the wonderful intake services he provided for over eight years.

Hotline attorneys continued to host hotline events at their home for hotline staff and alumni.

SENIOR LEGAL HOTLINES SIGNIFICANT EVENTS October 1, 1999 – September 30, 2000

FLORIDA

This fiscal year, the Legal Hotline for Older Floridians hired a full-time Directing Attorney to run the Hotline. The Hotline was also awarded a 2-year contract with the Florida Department of Elder Affairs in order to develop a pilot project to promote the availability of bilingual legal services to vulnerable seniors throughout Florida. Spanish and Creole speaking seniors residing anywhere in the state can now access the Hotline toll-free. As part of its outreach plan for its project with the DEA, the Hotline's Directing Attorney became a member of the Haitian Elder Task Force, a local organization whose mission is to promote the quality of life of Haitian American elders.

GEORGIA

The hotline received a grant from the GA protection and advocacy agency to use the hotline to identify people who are potentially eligible for QMB and SLMB benefits. The Hotline manager petitioned the state bar to form an elder law section and was appointed the first chair of the section. Through this section, we have been able to expand our referral base. The hotline manager has been working towards getting a continuing state appropriation for the hotline to assure long-term funding for basic hotline services.

KANSAS

During this year, we encountered our first year of state funding for the program. We have been successful in getting state funds as well as some money from the Bar to match the funds. This matching money has been quite helpful in making us the preferred provider to the state.

Our system of operation continues to be the use of a staff attorney for a limited amount of time, with tie-ins with 3B attorneys across the state and the use of volunteer attorneys on half-day shifts in their offices. We continue to transfer calls to those attorneys through a direct connect phone process.

At year-end, we began the process of moving the location of the Hotline attorneys. Previously, the best attorney for handling the calls was not located in the same office as the hotline manager. This was good for clients, but not always best for management. The departure of this staff attorney resulted in the Hotline attorney position moving in and being directly under the supervision of the Hotline manager. That position has been filled with a number of contract attorneys. The line is still open 8:30 a.m. to 4:30 p.m. These attorneys spend approximately 1/3 of their time on Hotline cases and take other advice cases paid for by other funding sources during the remainder of their time. All other aspects of the program, including the use of volunteer attorneys, remain intact.

Most striking has been the growth in this program. We have actually moved beyond our estimates of the number of calls handled each month and are handling more than 300 cases each month through the Hotline. We continue to publicize the program through aging networks, but find that much of that is being done by other agencies and aging network in the Department On Aging at this point.

KENTUCKY

During the 1999-2000 reporting year, the Legal HelpLine for Older Kentuckians assisted clients from 119 of Kentucky's 120 counties on a wide array of issues. The two most common issues continue to be Health Care, including Medicare, Medicaid and advance directives, and basic estate planning, including Wills and Power-of-Attorney documents.

The HelpLine staff attorney produced and desktop-published 10 consumer information brochures on topics ranging from Access to prescription drugs to guardianship. Nearly 40,000 copies of these brochures were distributed. The HelpLine attorneys also served as speakers at 19 community outreach and educational events reaching 387 people. The HelpLine staff attorney built alliances with the Alzheimer's Association and Hospice of the Bluegrass during this period. Through these alliances the staff attorney has provided counseling, training and client services. The HelpLine co-sponsored with the Kentucky Office of Aging Services an AARP Foundation National Training Foundation CLE event on Advance Directives and Planning for Incapacity, providing training for over 35 elder services advocates. The HelpLine Attorneys served as editors for an updated edition of a book titled "Laws and Programs for Older Kentuckians" that is being published by the Kentucky Bar Association.

In early October 2000, Dennis Stutsman, the HelpLine managing attorney, announced that he would be leaving effective November 1, 2000 to become manager of the appeals division at the Kentucky Department of Public Advocacy.

SENIOR LEGAL HOTLINES SIGNIFICANT EVENTS October 1, 1999 – September 30, 2000

MARYLAND

The Maryland Senior Legal Aid Hotline began taking calls from seniors in Spring 2000. It was integrated into the operation of the general Maryland Legal Aid Bureau intake hotline.

Major activities of the program for Fiscal 2000 include:

- **Implemented Hypertext Substantive Law database design** – Gathered materials and designed an interface with the contact management system. Held conversations with AARP on collaborative projects.
- **Web-enabled hypertext referral database** – Completed general design. Sent requests for Proposals. Collecting the information to populate the database.
- **Protocols and Procedures manual based on national models** – Collected Materials from other organizations. Began an electronic version on the LAB Intranet. Held planning meetings to determine interface of existing projects and the Senior Hotline. Intranet draft completed. Development still in progress.
- Created two Brochures introducing seniors and their families to free legal help on the Internet and low cost or free means to access this information.
- Completed and distributed Brochure introducing Spanish-speaking seniors and their families to the Maryland Senior Hotline.
- **Training Program for Senior Hotline Attorneys** – Created specialized training material – “Best Practice in Telephone Communications Exercise” and “Best Practice Tips for Attorneys Working with Elder Callers”. Selected dates, trainers, and sites.
- Established weekly staff and training meetings for all Hotline staff.
- **Training Program for I&A workers on the use of databases and coordinated referrals with the Senior Legal Hotline** – Identified a cross-training planning committee and started a process to develop the plan. Submitted survey to MDoA to identify resources and training issues of I&A staff. Met with AAA directors and gained commitment on cross-training with IIIB staff. Began collecting surveys submitted to MDoA to identify resources and training issues of I&A staff.
- **Pilot “Self Help Legal Desk” integrating services of Senior Hotline, the People’s Law Library and community education materials** – Convened a planning group, established guidelines and identified a site. MLAN provided funding to the Village Learning Place outreach suite. Planned opening in May, 2000.
- Expanded Elder Law Section of the People’s Law Library website.
- **Telephony demonstrations** – Three vendors presented demonstrations of their responses to the request for proposals for telephony system development.
- Finalized Plan for Integration of “Sixty Plus” and Family Law Hotline services with the Senior Hotline.
- Developed plan with the III-B provider to route all senior calls in Baltimore County to the Senior Hotline for assistance.
- **Statistical information** – There were 375 calls handled from seniors during the reporting period, representing 9.1% of the 3420 total calls received by the general intake “hotline.” Hotline staffing increases and the incorporation of “Sixty Plus,” the Family Law Hotline, and Baltimore County calls should result in many more calls received in the next six months.

MAINE

During 2000 the Maine Legal Services for the Elderly Hotline reports the following activities and events:

- the private attorney involvement in the low-fee referral panel was increased by 50 attorneys
- a new case management system -Practice Manager- will be installed in January 2001
- the program reached over 2000 people at presentations across the state, including seniors, social workers, and services coordinators in senior housing complexes
- the program was the lead organization in the state’s Medicare counseling program (SHIP) and participated in the presentation on SLIMBY and QMBY (Medicare buy-in programs); Maine Legal Services for the Elderly also assisted consumers affected by the Medicare HMO pull out
- a client outcome evaluation study was launched; all consumer and housing cases with an "unknown" outcome code will be called to ascertain the outcome of their problem. Preliminary results should be available during the first quarter of 2001.

SENIOR LEGAL HOTLINES SIGNIFICANT EVENTS October 1, 1999 – September 30, 2000

MICHIGAN

The Legal Hotline secured a second AoA Hotline grant, which began in December of 1999. The Pension Rights Project is in its second year.

In April of 2000, the Legal Hotline for Older Michigianians changed its name to the Legal Hotline for Michigan Seniors. The change is to help seniors more easily identify our program. We hope that over time it will reduce the number of ineligible callers that contact our office.

LHMS continues to work on broadening its fundraising base among corporations and private individuals to ensure our long term financial viability.

In April of 2000, the Hotline also began to outsource our day to day accounting. We use a small accounting firm to handle this function on a contractual basis.

In June 2000, Dolores Hahn, a Hotline attorney since 1991, retired. She was replaced with Christa Schofield.

NEW MEXICO

LREP teamed up with the State Agency on Aging, Attorney General, other agencies and a number of private bar attorneys to push for quality care of residents in long term care facilities. The committee developed a list of private attorneys who are interested in litigating against long term facilities in cases of abuse, neglect, and exploitation of residents. To date, LREP has made 11 referrals to attorneys and four cases appear to be heading for litigation.

LREP has increased its outreach efforts to Native Americans. At a recent workshop, we had a great turnout of Navajos. Also, one of the staff attorneys has begun doing workshop presentations in Spanish. In September, approximately 50 participants attended a workshop presentation in Spanish. We are in the process of translating the handout materials into Spanish.

LRP has formed a coalition with the Attorney General's Consumer Protection Division. For most of our education presentations, an attorney from the Division has accompanied us. The attorney does a presentation about the services they offer and how participants can access these. The attorney is then available to speak to participants individually.

OHIO

Pro Seniors' Hotline's most significant event /change for Fiscal 2000 has been the institution of an "appointment" system. Instead of taking calls on a "first-come-first served" basis, our Hotline now sets up appointments with our clients to ensure we are contacting them at a convenient time that accommodates their schedule. This new system was instituted in April of 2000, and thus far we have found that our success rate of reaching the client and handling their matter has increased. This new system promotes efficiency, and our clients seem to be pleased with our new system.

TENNESEE

The TELH added a part-time staff attorney to bring the number to two FTE. We began efforts to seek continuation funding after our AoA grant expires. We significantly increased our outreach efforts to rural and other underserved populations. A significant legal problem we are seeing is predatory lending practices aimed at vulnerable seniors.

TEXAS

The Legal Hotline received addition TDoA funding from HCFA to help with Medicare enrollees. The funding provided an additional 15 hours per week of staff attorney time.

A Secretary/Receptionist was hire in November to work 30 hours per week, but left at the end of December. An Administrative Assistant was hired in February to work 30 hours per week.

A new telephone system with voice mail was installed in January.

The computer system upgrade was begun in April and is continuing. Crystal Reports will be added soon to make report writing more efficient.

In September 2000 the Legal Hotline for Older Texans opened its 40,000th client file (PICK).

WASHINGTON

Our focus this year was planning beyond our initial three-year grant under Title IV. The Project Manager made a presentation concerning CLEAR* Sr to Northwest Justice Project" Board of Directors as a springboard to

SENIOR LEGAL HOTLINES SIGNIFICANT EVENTS October 1, 1999 – September 30, 2000

discussing alternate funding sources for the hotline should we not receive continued funding from the AoA. We also organized a gathering of all the key legal services providers in the state to discuss CLEAR*Sr, including our ideas for an innovative project to propose to the AoA under a new Title IV grant. We received a lot of helpful feedback which assisted us in our grant application. In September 2000, we were informed by the AoA that we would receive Title IV funding for an additional three-year period. Our new project will use a holistic approach and web-based technology to address high priority consumer law needs of our clients.

We changed our delivery model somewhat during this year. Our Administrative Assistant began picking up the line at the point a client was ready to leave a message (either when periodically offered that option or when “forced” into voicemail when the estimated wait was too long), and instead of having the client leave a voice mail, she would take down demographic information and schedule a callback from an attorney for a specific time that afternoon. This new model has greatly increased client satisfaction, and greatly lowered the number of “missed” callbacks.

During the year, we instituted open case assessment meetings, in which all of advocates get together to share strategies/ideas on each advocate’s cases open for “brief service” on a rotating basis. This makes all advocates and the Project Manager more aware of all the project’s on-going clients, and helps the advocates have a better handle on their obligations to clients.

This year, CLEAR*Sr was part of a survey funded by the AARP designed to look at the effectiveness of senior “hotlines”. We sent the survey to each of our senior clients over a six-month period. Results are still pending.

In response to serious consumer problems faced by our senior clients, and a lack of legal referral resources in this area, the Project Manager helped to form a statewide Consumer Law Task Force this year, bringing together advocates in legal services, law schools, the Attorney General’s office, and the private bar. The task force serves to train advocates new to consumer law (thus encouraging them to take cases) and discuss strategies for addressing high priority consumer issues. The Project Manager is Co-Chair of the task force.

Our new case management software, CASS, debuted this May. This software was designed specifically for Northwest Justice Project and Columbia Legal Services, our partner program in the state. The software was designed to respond to the specific needs of a centralized intake system while still being responsive to the needs of local field offices.

WEST VIRGINIA

Staff changes: hired staff attorney Julie Romain, SCSEP employee Mary Jo Jones, summer intern and work-study student Melissa Carlton.

Projects accomplished: new fiscal/bookkeeping system on Quickbooks, new network of four computers with modem sharing, new peripherals (scanners, printers, digital camera, CD burner, web cam), over 150 hours of private bar pro bono representation! lots of outreach, updated FAQ manual.

October 1, 1999-September 30, 2000

CATEGORIES OF CASE TYPES INCLUDE THE FOLLOWING TOPICS:

Consumer

Bankruptcy
Collection
Contracts
Loans
Unfair Sales Practices
Credit
Other Consumer

Family

Divorce/Separation
Custody/Visitation
Name Change
Spouse/Child Abuse
Support
Adoption
Other Family

Health

Medicaid
Medicare
Private Insurance,
Medigap
Health Care Decision
Nursing Home
Hill Burton
Mental Health,
Physical Handicap
Other Health

Housing

Landlord/Tenant
Govt Sub Housing
Mortg Forecl/Tax Sle
Real Estate
Utilities
Zoning
Condominiums
Other Housing

**Wills, Estates, Probate,
Guardianship**

Guardian/Conservator
Altern to Guardians
Probate
Wills and Estate Plan
Joint Ownership
Trusts
Other

Tax

Federal Tax
State and Local Tax
Inheritance Tax
Other Tax

Public Benefits

Food Stamps/Nutri
SSA
SSI
Unemployment
Veterans Benefits
GPA/Emerg. Assist.
Other Public Benefits

Auto Accidents/ Torts

Auto
Torts Except Auto

Employment & Pensions

Workers Compensation
ERISA
Employment/Labor
Relations

Other

Insurance (Not Health)
Criminal/Police
Discrimination
Small Business,
Corporate
Neighbor Disputes
Immigration,
Naturalization
Patents, Copyright,
Trademark
Military
Civil Rights
Social Services
Atty-Client Matters
Legal Procedure
Courts
Investments, Securities
Driver's License
Miscellaneous

CASE TYPES
PA LEGAL ADVICE LINE
October 1999 - September 2000

