

# SENIOR LEGAL HOTLINES

## ANNUAL REPORT

OCTOBER 1, 2000 - SEPTEMBER 30, 2001



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

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## 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 23 in 2001. 20 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 Legal Hotline for Older Floridians, due to funding issues, ceased operation for the time being, in May 2001. The Indiana Senior Legal Hotline began serving clients in Fall 01 and its statistics were not included in this report. The Foundation identified Wyoming Legal Services in Lander as serving seniors statewide with hotline services. As a result of the 2001 AoA Request for Proposals for Senior Statewide Hotlines, four existing hotlines received \$95,000 grants to implement various innovative hotline-related projects. The winners were Legal HelpLine for Older Kentuckians, Maine Legal Services for the Elderly, Legal Counsel for the Elderly Hotline in D.C. and Senior Legal Hotline at Legal Services of Northern California. The Tennessee Elder Law Hotline had to decrease its senior hotline services to the service area of its sponsor organization, Southeast Tennessee Legal Services, as a result of the termination of its Title IV grant.

This year the 22 senior hotlines handled almost 84,000 calls and closed more than 62,000 cases. More than 51,000 households were served.

The Pennsylvania Advice Line continues to be operated by Tele-Lawyer, Inc. under a contract with AARP. The client eligibility parameters were changed this year. All Pennsylvania AARP members receive free telephone consultations with an attorney. All others pay \$3.00 per minute. The contract with Tele-Lawyer has reduced the cost of running the hotline by one-half while increasing attorney productivity three-fold. The increase in efficiency is due mainly to the fact that demographic screening and input and all client call backs are performed by Tele-Lawyer receptionists rather than the attorney. The attorney is paid only for time spent on the phone plus three minutes for writing casenotes.

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 Support Library. Hundreds of documents are now available at the library.

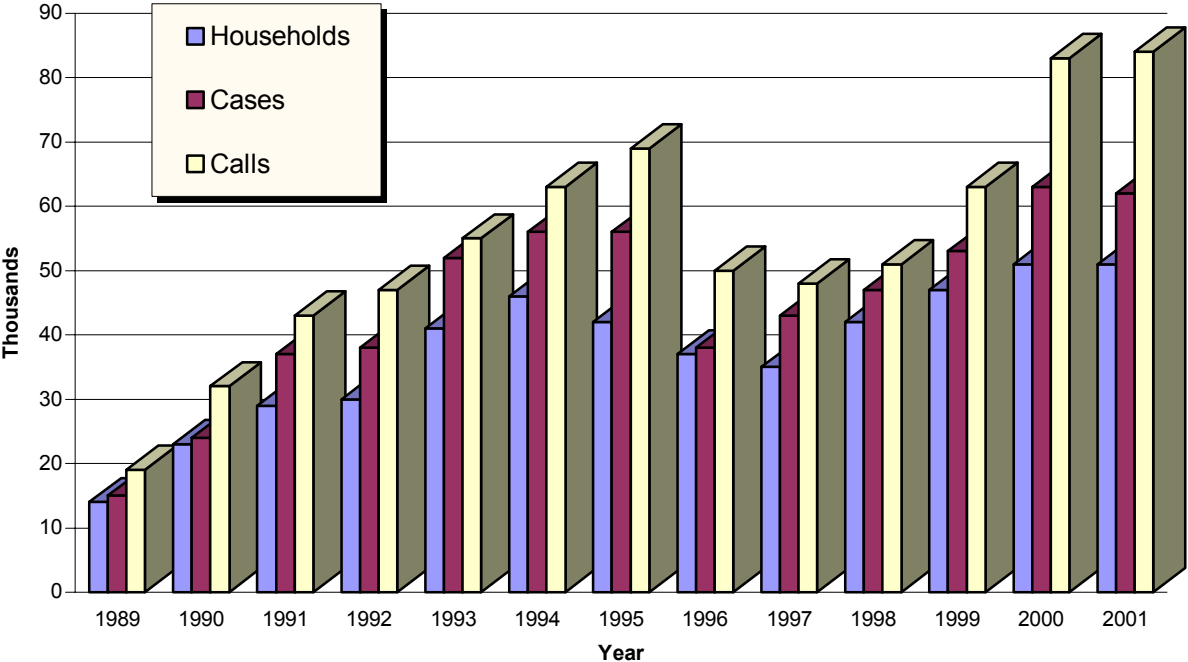
The Project manages an interactive Technical Support email group at [legalhotlines@yahoogroups.com](mailto:legalhotlines@yahoogroups.com). Technical assistance queries posted there are answered by Project Staff as well as other experienced legal hotline managers. In August, the ABA House of Delegates adopted Standards for the Operation of a Telephone Hotline Providing Legal Advice and Information, [www.legalhotlines.org](http://www.legalhotlines.org).

The Project maintains a Directory of Legal Hotlines. The Directory describes over 150 legal hotline programs nationwide. 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. A searchable version of the Directory is located at [www.legalhotlines.org](http://www.legalhotlines.org) The Technical Support for Legal Hotlines Project can be reached at 954-472-0997 or [rose99@attbi.com](mailto:rose99@attbi.com)



# Households, Cases, Calls 1989-2001

Growth By Year



Productivity Report  
October 1, 2000 – September 30, 2001

	<i>formula</i>	<b>AZ</b>	<b>CA</b>	<b>DC</b>	<b>GA</b>	<b>HI</b>
<b>Households Year Total</b>		2,643	5,982	1,826	3,450	741
<b>A Cases Year Total</b>		3,073	7,194	2,566	4,074	1,354
<b>B Calls Year Total</b>		4,179	14,891	3,106	7,741	2,324
<b>C: Avg FTE Paid Staff</b>		1.75	5.80	1.54	4.00	1.50
<b>D Avg FTE Volunteers</b>		0.00	1.89	0.00	0.75	0.50
<b>E: Total FTE</b>	<i>C+D</i>	1.75	7.69	1.54	4.75	2.00
<b>Cases per FTE Staff</b>	<i>A/C</i>	1,756	1,240	1,666	1,019	903
<b>% time Paid Staff</b>	<i>C/E</i>	100.00%	75.42%	100.00%	84.21%	75.00%
<b>% time Volunteers</b>	<i>D/E</i>	0.00%	24.58%	0.00%	15.79%	25.00%
<i>Cases/hr (paid staff)</i>	<i>(A/C)/2000</i>	0.88	0.62	0.83	0.51	0.45
<i>Calls/hr (paid staff)</i>	<i>(B/C)/2000</i>	1.19	1.28	1.01	0.97	0.77
<b>F: Hotline Cost</b>		\$ 95,000	\$ 336,869		\$ 152,000	\$ 46,670
<b>Cost/ Case</b>	<i>F/A</i>	\$30.91	\$46.83		\$37.31	\$34.47
<b>Cost/ Call</b>	<i>F/B</i>	\$22.73	\$22.62		\$19.64	\$20.08

*Figures in Italics are estimates based on ratio of Households/Cases (0.86); Calls/Cases (1.36) in 2001 (from 13 hotlines which reported all three figures).*

*Avg Total Cost/Case and Avg Total Cost/Call is based on the total cases (43,980) and total calls (63,008) of the 16 hotlines which reported their Hotline Cost.*

*Hotline Cost does not include in-kind volunteer support in CA=\$73,193; in KY=\$89,227; in WV=\$50,341*

Productivity Report  
October 1, 2000 – September 30, 2001

<b>IA</b>	<b>KS</b>	<b>KY</b>	<b>MD</b>	<b>ME</b>	<b>MI</b>
1,958	2,344	1,513	1,686	2,219	3,906
2,180	2,448	1,898	1,960	2,304	4,349
2,180	2,725	2,279	2,666	3,456	5,915
3.50	0.30	2.00	1.78	3.50	2.00
0.04	1.00	0.50	0.00	0.00	0.10
3.54	1.30	2.50	1.78	3.50	2.10
623	8,160	949	1,101	658	2,175
98.87%	23.08%	80.00%	100.00%	100.00%	95.24%
1.13%	76.92%	20.00%	0.00%	0.00%	4.76%
0.31	4.08	0.47	0.55	0.33	1.09
0.31	4.54	0.57	0.75	0.49	1.48
\$ 45,125	\$ 100,000	\$ 165,901	\$ 269,742	\$ 266,500	
	\$18.43	\$52.69	\$84.64	\$117.08	\$61.28
	\$16.56	\$43.88	\$62.23	\$78.05	\$45.05

Productivity Report  
October 1, 2000 – September 30, 2001

	<b>MS</b>	<b>NH</b>	<b>NM</b>	<b>OH</b>	<b>PA</b>	<b>PR</b>
<b>Households Year Total</b>	366	1,545	2,668	4,508	3,587	1,239
<b>A Cases Year Total</b>	373	1,796	5,330	5,247	3,587	1,441
<b>B Calls Year Total</b>	377	2,334	5,992	5,667	3,703	1,960
<b>C: Avg FTE Paid Staff</b>	0.25	2.00	2.60	2.31	0.30	3.50
<b>D Avg FTE Volunteers</b>	0.00	0.00	0.80	0.04	0.00	0.00
<b>E: Total FTE</b>	0.25	2.00	3.40	2.35	0.30	3.50
<b>Cases per FTE Staff</b>	1,492	898	2,050	2,271	11,957	412
<b>% time Paid Staff</b>	100.00%	100.00%	92.00%	98.30%	100.00%	100.00%
<b>% time Volunteers</b>	0.00%	0.00%	8.00%	1.70%	0.00%	0.00%
<i>Cases/hr (paid staff)</i>	0.75	0.45	1.03	1.14	5.98	0.21
<i>Calls/hr (paid staff)</i>	0.75	0.58	1.15	1.23	6.17	0.28
<b>F: Hotline Cost</b>		\$ 166,306	\$ 233,500	\$ 199,285	\$ 56,513	
<b>Cost/ Case</b>		\$92.60	\$43.81	\$37.98	\$15.75	
<b>Cost/ Call</b>		\$71.25	\$38.97	\$35.17	\$15.26	

*Figures in Italics are estimates based on ratio of Households/Cases (0.86); Calls/Cases (1.36) in 2001 (from 13 hotlines which reported all three figures).*

*Avg Total Cost/Case and Avg Total Cost/Call is based on the total cases (43,980) and total calls (63,008) of the 16 hotlines which reported their Hotline Cost.*

*Hotline Cost does not include in-kind volunteer support in CA=\$73,193; in KY=\$89,227; in WV=\$50,341*

Productivity Report  
October 1, 2000 – September 30, 2001

TN	TX	WA	WV	WY	TOTALS	Average (22)
489	5,356	2,079	901	227	<b>51,233</b>	2,329
580	6,916	2,079	1,048	264	<b>62,061</b>	2,821
789	7,541	2,349	1,425	359	<b>83,958</b>	3,816
1.50	2.00	1.90	1.50	0.50	<b>46.03</b>	2.09
0.25	0.00	0.00	0.00	0.00	<b>5.87</b>	0.27
1.75	2.00	1.90	1.50	0.50	<b>51.90</b>	2.36
387	3,458	1,094	699	528		1,348
85.71%	100.00%	100.00%	100.00%	100.00%	88.69%	88.69%
14.29%	0.00%	0.00%	0.00%	0.00%	11.31%	11.31%
0.19	1.73	0.55	0.35	0.26	0.67	0.67
0.26	1.89	0.62	0.48	0.36	0.91	0.91
\$ 185,546		\$ 151,000	\$ 210,000		\$ 2,679,957	\$ 167,497
\$319.91		\$72.63	\$200.38			\$66.33
\$235.17		\$64.28	\$147.37			\$46.30

# Productivity Report

## Comparison of FY 2000 and FY 2001

		COMPARISON OF 2000 AND 2001						
		AZ	CA*	DC	GA	HI	IA	KS
<b>Households served</b>	00	3,200	3,833	1,761	3,644	951	2,014	3,212
	01	<i>2,643</i>	5,982	1,826	3,450	741	1,958	2,344
<b>Cases handled</b>	00	4,000	4,687	2,624	3,709	1,654	2,163	3,497
	01	<i>3,073</i>	7,194	2,566	4,074	1,354	2,180	2,448
<b>Calls handled</b>	00	5,160	9,981	3,140	9,782	2,878	2,163	3,645
	01	<i>4,179</i>	14,891	3,106	7,741	2,324	2,180	2,725
<b>Average cases/hr</b> (paid staff only)	00		0.48	1.01	0.53	0.55	0.53	5.83
	01	0.88	0.62	0.83	0.51	0.45	0.31	4.08
<b>Average calls/hr</b> (paid staff only)	00		1.01	1.21	1.40	0.96	0.53	6.08
	01	1.19	1.28	1.01	0.97	0.77	0.31	4.54
<b>Total cost</b>	00		\$ 262,437		\$ 160,500	\$ 44,475	\$ 176,787	\$ 62,000
	01	\$ 95,000	\$ 336,869		\$ 152,000	\$ 46,670	\$ -	\$ 45,125
<b>Total project-generated income</b> (Reduced fee panel, donations and fees)	00		\$ 4,381			\$ -	\$ -	\$ -
	01	\$ -	\$ 16,484		\$ 1,000	\$ -	\$ -	\$ -
<b>Gross cost/case</b>	00		\$ 55.99		\$ 43.27	\$ 26.89	\$ 81.73	\$ 17.73
	01	\$ 30.91	\$ 46.83		\$ 37.31	\$ 34.47	\$ -	\$ 18.43
<b>Net cost/case</b>	00		\$ 55.06		\$ 43.27	\$ 26.89	\$ 81.73	\$ 17.73
	01	\$ 30.91	\$ 44.54		\$ 37.06	\$ 34.47	\$ -	\$ 18.43

*Figures in Italics are estimates based on ratio of Households = 0.8\*Cases; Calls = 1.29\*Cases in 2000, Households=0.86\*Cases; Calls=1.36\*Cases in 2001*

*\*Gross Cost does not include in-kind volunteer support in CA=\$73,193; in KY=\$89,227; in WV=\$50,341*

*\*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.*

*It does not include TeleLawyer overhead such as rent and utilities.*

*\*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.*

*\*# 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)*

# Productivity Report

## Comparison of FY 2000 and FY 2001

	<b>KY*</b>	<b>MD</b>	<b>ME</b>	<b>MI</b>	<b>Page Total</b>
<b>Households served</b>	1,332	372	2,934	4,002	27,255
	1,513	1,686	2,219	3,906	28,268
<b>Cases handled</b>	1,574	465	3,342	4,714	32,429
	1,898	1,960	2,304	4,349	33,400
<b>Calls handled</b>	1,749	600	4,311	5,610	49,019
	2,279	2,666	3,456	5,915	51,462
<b>Average cases/hr</b> (paid staff only)	0.39 0.47	0.36 0.55	0.42 0.33	1.18 1.09	
<b>Average calls/hr</b> (paid staff only)	0.44 0.57	0.46 0.75	0.54 0.49	5.00 1.48	
<b>Total cost</b>		\$ 241,109	\$ 275,000	\$ 231,387	\$ 1,261,042
	\$ 100,000	\$ 165,901	\$ 269,742	\$ 266,500	\$ 1,477,807
<b>Total project-generated income</b>		\$ -	\$ -	\$ 12,000	\$ 16,381
<b>(Reduced fee panel, donations and fees)</b>	0	\$ -	\$ -	\$ 68,000	\$ 85,484
<b>Gross cost/case</b>		\$ 518.51	\$ 82.29	\$ 49.09	
	\$ 52.69	\$ 84.64	\$ 117.08	\$ 61.28	
<b>Net cost/case</b>		\$ 518.51	\$ 82.29	\$ 41.25	
	\$ 52.69	\$ 84.64	\$ 117.08	\$ 45.64	

*Figures in Italics are estimates based on ratio of Households = 0.8\*Cases; Calls = 1.29\*Cases in 2000, Households=0.86\*Cases; Calls=1.36\*Cases in 2001*

*\*Gross Cost does not include in-kind volunteer support in CA=\$73,193; in KY=\$89,227; in WV=\$50,341*

*\*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.*

*It does not include TeleLawyer overhead such as rent and utilities.*

*\*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.*

*\*# 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)*

# Productivity Report

## Comparison of FY 2000 and FY 2001

		COMPARISON OF 2000 AND 2001, page 2						
		MS	NH	NM	OH	PA	PR	TN
<b>Households served</b>	00	291	<i>1,444</i>	2,605	4,632	3,248	1,222	1,645
	01	366	<i>1,545</i>	2,668	4,508	3,587	<i>1,239</i>	489
<b>Cases handled</b>	00	329	1,805	4,132	5,545	3,458	1,528	1,645
	01	373	1,796	5,330	5,247	3,587	1,441	580
<b>Calls handled</b>	00	373	2,347	4,220	5,989	3,512	<i>1,971</i>	1,645
	01	377	2,334	5,992	<i>5,667</i>	3,703	<i>1,960</i>	789
<b>Average cases/hr</b> (Paid staff only)	00	0.16	0.45	0.67	0.96	4.80	0.19	0.41
	01	0.75	0.45	1.03	1.14	5.98	0.21	0.19
<b>Average calls/hr</b> (Paid staff only)	00	0.19	0.59	0.68	1.03	4.88	<i>0.25</i>	0.41
	01	0.75	0.58	1.15	1.23	6.17	<i>0.28</i>	0.26
<b>Total cost</b>	00		\$ 149,158	\$ 172,194	\$ 203,918	\$ 58,000		\$ 185,546
	01		\$ 166,306	\$ 233,500	\$ 199,285	\$ 56,513		\$ 185,546
<b>Total project-generated income</b> (Reduced fee panel, donations and fees)	00		\$ -	\$ -	\$ 2,558	\$ 3,500		\$ -
	01		\$ -	\$ -	\$ 5,321	\$ 9,254		\$ -
<b>Gross cost/case</b>	00		\$ 82.64	\$ 41.67	\$ 36.78	\$ 16.77		\$ 112.79
	01		\$ 92.60	\$ 43.81	\$ 37.98	\$ 15.75		\$ 319.91
<b>Net cost/case</b>	00		\$ 82.64	\$ 41.67	\$ 36.31	\$ 16.51		\$ 112.79
	01		\$ 92.60	\$ 43.81	\$ 36.97	\$ 13.18		\$ 319.91

*Figures in Italics are estimates based on ratio of Households = 0.8\*Cases; Calls = 1.29\*Cases in 2000, Households=0.86\*Cases; Calls=1.36\*Cases in 2001*

*\*Gross Cost does not include in-kind volunteer support in CA=\$56,118; in WV=\$50,341*

*\*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.*

*It does not include TeleLawyer overhead such as rent and utilities.*

*\*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.*

*# 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)*

# Productivity Report

## Comparison of FY 2000 and FY 2001

	<b>TX</b>	<b>WA</b>	<b>WV</b>	<b>WY</b>	<b>Page Total</b>	<b>TOTALS</b>
<b>Households served</b>	5,229	2,059	893		23,268	<b>50,523</b>
	5,356	2,079	901	227	22,965	<b>51,233</b>
<b>Cases handled</b>	7,661	2,574	893		29,570	<b>61,999</b>
	6,916	2,079	1,048	264	28,661	<b>62,061</b>
<b>Calls handled</b>	8,931	2,830	893		32,711	<b>81,730</b>
	7,541	2,349	1,425	359	32,496	<b>83,958</b>
<b>Average cases/hr</b> (Paid staff only)	1.88	0.86	0.30			
	1.73	0.55	0.35	0.26		<b>0.67</b>
<b>Average calls/hr</b> (Paid staff only)	2.19	0.94	0.30			
	1.89	0.62	0.48	0.36		<b>0.91</b>
<b>Total cost</b>	\$ 314,797	\$ 175,091	\$ 206,508		\$ 1,465,212	<b>\$ 2,726,254</b>
		\$ 151,000	\$ 210,000		\$ 1,202,150	<b>\$ 2,679,957</b>
<b>Total project-generated income</b> (Reduced fee panel, donations and fees)	\$ 3,242	\$ -	\$ 400		\$ 9,700	<b>\$ 26,081</b>
					\$ 14,575	<b>\$ 100,059</b>
<b>Gross cost/case</b>	\$ 41.09	\$ 68.02	\$ 231.25			
	\$ -	\$ 72.63	\$ 200.38			
<b>Net cost/case</b>	\$ 40.67	\$ 68.02	\$ 230.80			
	\$ -	\$ 72.63	\$ 200.38			

*Figures in Italics are estimates based on ratio of Households = 0.8\*Cases; Calls = 1.29\*Cases in 2000, Households=0.86\*Cases; Calls=1.36\*Cases in 2001*

*\*Gross Cost does not include in-kind volunteer support in CA=\$56,118; in WV=\$50,341*

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*\*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.*

*# 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)*

ADVOCATES	AZ	CA	DC	GA	HI	IA	KS	KY	MD	ME	MI	MS
<b>Avg FTE Paid</b>												
Attorneys	0.75	2.80	1.40	2.50	1.00	2.00	0.30	2.00	1.70	2.50	2.00	0.25
Paralegals	1.00	3.00		1.25	0.50				0.08	1.00		
Law Students				0.25		1.50						
<i>support staff</i>					4.00							
<i>intake</i>												
<b>Avg FTE Volunteers</b>												
Attorneys		1.00	0.00	0.50		0.04	1.00				0.10	
Paralegals		0.23			0.25							
Law Students		0.07		0.25	0.25			0.25				
<i>Other (please specify)</i>												
<i>social workers/students</i>		0.59						0.25				
<i>intake</i>					0.43							
<b># Paid (year end)</b>												
Attorneys	2	4	6	4	8	2	1	2	9	5	5	5
Paralegals	1	3		2	1				1	1		
<i>intake</i>												
<b># Volunteers (year end)</b>												
Attorneys		19		3	2	1	123					1
Paralegals		2			1							
Law Students		2		2	3			1				
<i>social workers/students</i>		3						1				
<i>intake</i>												
<b># Paid-Added during year</b>												
Attorneys		1		2	5	1		1	3			
Paralegals					3				2			
Law Students						1						
<b># Volunteers-Added during year</b>												
Attorneys		9			2	1						
Paralegals		2			1							
Law Students		2		2	3			1				
<i>social workers/students</i>		4						1				
<b># Paid-Dropped during year</b>												
Attorneys		1		3	4			1			1	
Paralegals				1	5				1			
Law Students						1						
<b># Volunteers-Dropped during year</b>												
Attorneys		4				1	21					
Paralegals		1			3							
Law Students		1		1	4							
<i>social workers/students</i>		5										

	NH	NM	OH	PA	PR	TN	TX	WA	WV	WY	TOTAL	AVG
<b>Avg FTE Paid</b>												
Attorneys	2.00	2.60	2.31	0.30	3.50	1.50	2.00	1.90	1.50	0.50	36.56	2.03
Paralegals		0.80							1.00		7.63	0.42
Law Students									2.00		3.75	0.21
support staff		0.25						1.50			5.75	0.32
intake	0.77		0.50					0.25			1.52	0.08
<b>Avg FTE Volunteers</b>												
		0.25										
Attorneys			0.04			0.25					2.93	0.16
Paralegals											0.48	0.03
Law Students											0.82	0.05
Other (please specify)			0.40								0.40	0.02
social workers/students											0.84	0.05
intake			0.50		0.75						0.17	0.01
<b># Paid (year end)</b>												
Attorneys	2	3	7	1	2	2	10	3	2	1	84	4.67
Paralegals		1			1				1		0	0.01
intake			1								1	0.06
<b># Volunteers (year end)</b>												
Attorneys			1								150	8.33
Paralegals											3	0.17
Law Students											8	0.44
social workers/students											4	0.22
intake			1								1	0.06
<b># Paid-Added during year</b>												
Attorneys			2			1	4		1		21	1.17
Paralegals											5	0.28
Law Students									1		2	0.11
<b># Volunteers-Added during year</b>												
Attorneys						1					13	0.72
Paralegals											3	0.17
Law Students											8	0.44
social workers/students											5	0.28
<b># Paid-Dropped during year</b>												
Attorneys			1		2	2			0		15	0.83
Paralegals							1				8	0.44
Law Students									1		2	0.11
<b># Volunteers-Dropped during year</b>												
Attorneys						1	2				29	1.61
Paralegals											4	0.22
Law Students											6	0.33
social workers/students											5	0.28

**SENIOR LEGAL HOTLINES  
TOTAL COST, FUNDING SOURCES  
October 1, 2000-September 30, 2001**

**ARIZONA**

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

**FUNDING SOURCES**

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

**CALIFORNIA**

TOTAL COST ..... \$336,869

**FUNDING SOURCES**

Administration on Aging ..... \$106,985  
 Legal Services ..... \$ 39,496  
 IO(L)TA ..... \$ 27,085  
 Donations ..... \$ 16,124  
 Client Fees ..... \$ 360  
 Training Events ..... \$ 7,430  
 Foundations/ Trusts ..... \$139,389

(In-Kind Support (volunteers) ..... (\$ 73,193)  
 Total **\$410,062**

**GEORGIA**

TOTAL COST ..... \$152,000

**FUNDING SOURCES**

Administration on Aging ..... \$110,000  
 LSC ..... \$ 22,000  
 Donations ..... \$ 1,000  
 In-Kind Support from State Unit on Aging .. \$ 19,000

**HAWAII**

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

**FUNDING SOURCES**

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

**IOWA**

TOTAL COST (2000) ..... \$176,787

**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 ..... \$ 45,125

**FUNDING SOURCES**

State Department on Aging ..... \$ 13,125  
 IO(L)TA ..... \$ 32,000

**KENTUCKY**

TOTAL COST ..... \$189,227

**FUNDING SOURCES**

Administration on Aging ..... \$100,000  
 Access to Justice Foundation Association of Older  
 Kentuckians ..... \$ 89,227

**MARYLAND**

TOTAL COST ..... \$165,901

**FUNDING SOURCES**

Administration on Aging ..... \$110,269  
 Maryland Legal Assistance Network –  
 matching funds ..... \$ 3,575  
 Legal Aid Bureau ..... \$ 52,057

**MAINE**

TOTAL COST ..... \$269,742

**FUNDING SOURCES**

Administration on Aging ..... \$ 88,299  
 State Department on Aging ..... \*\$152,671  
 Area Agency on Aging ..... \$ 4,000  
 Other ..... \$ 24,772  
 \* Also includes overall program support from IOLTA  
 and Maine Civil Legal Services Fund.

**MICHIGAN**

TOTAL COST ..... \$266,500

**FUNDING SOURCES**

Administration on Aging ..... \$139,000  
 State Department on Aging ..... \$ 15,000  
 Area Agency on Aging ..... \$ 3,500  
 IO(L)TA ..... \$ 45,000  
 Donations ..... \$ 43,000  
 Contracts for service ..... \$ 25,000

**NEW HAMPSHIRE**

TOTAL COST ..... \$166,306  
 ..... (9/2000-8/2001)

**FUNDING SOURCES**

Administration on Aging ..... \$ 98,680  
 State Department on Aging ..... \$ 30,000  
 IO(L)TA ..... \$ 20,626  
 United Way ..... \$ 17,000

**NEW MEXICO**

TOTAL COST .....\$233,500

FUNDING SOURCES

State Department on Aging .....\$192,174  
State Bar .....\$ 41,326

**OHIO**

TOTAL COST .....\$199,285

FUNDING SOURCES

State Department on Aging .....\$ 65,657  
IO(L)TA .....\$ 68,841  
Client Fees .....\$ 5,321  
Community Chest .....\$ 54,904  
In-Kind Support (volunteers).....\$ 4,562

**PENNSYLVANIA**

TOTAL COST .....\$ 56,513

FUNDING SOURCES

AARP .....\$ 47,259  
Client Fees .....\$ 9,254

**TENNESSEE**

TOTAL COST .....\$185,546

FUNDING SOURCES

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

**TEXAS**

TOTAL COST (2000) .....\$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 .....\$151,000

FUNDING SOURCES

State Department on Aging .....\$ 99,850  
IO(L)TA .....\$ 51,150

**WEST VIRGINIA**

TOTAL COST (2000) .....\$206,508

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

**WYOMING**

TOTAL COST.....?

FUNDING SOURCES

State Department on Aging .....\$42,000  
In Kind from Legal Services Corp. .... ?

**SENIOR LEGAL HOTLINES  
SIGNIFICANT EVENTS  
October 1, 2000 – September 30, 2001**

**ARIZONA**

Converted 75,000 cases from old Kemps software to new Kemps software.

**CALIFORNIA**

Paid advocacy staff has remained steady – the only change being the sudden death of one part-time attorney and his quick replacement by a previous volunteer. Several supplementary grants, mostly for client education projects, have enabled this consistency. It could change in either direction in the future, and is already being adversely affected by the reduction in the new AOA hotline grant.

Volunteer numbers have steadily increased, however, despite the established tendency to hire them when openings occur. This has led to a steady growth in our client/case numbers. We continue to recruit aggressively and hope that more volunteers will join us and extend this trend even further. As before, the largest growth has been outside our home county, a product of increasingly successful outreach and collaboration with local senior legal services programs throughout the region – still a touchy issue in some counties.

This growth has exacerbated the serious strain on our space reported last year. We now have 17 (including two shared) operative computer stations and phone lines in seven rooms – and on several occasions they have all been in use. We plan to squeeze in two more. Any significant increase in funding, while welcome, would now require us to move to larger space, and it would cost much more than we are paying now for space in the building that houses the local office of our LSC agency sponsor.

Three new computers were added to our supply, and the “old” (1999) models all got some extra memory. Most helpful was the installation of a stable server for a network that we share with the other offices and programs in our and adjacent buildings. We also obtained a new printer, faster and capable of using 11 x 17 paper, which we use for several of our forms.

Perhaps the most significant development of the past year was the establishment and development of our web site. It is mainly client-focused, containing a growing quantity of informational material and enabling seniors to submit their questions by e-mail. Almost the entire site exists in Spanish as well as English, and there are slowly growing sections in several other languages.

Part of the web site provides information for other senior legal services advocates. It includes, for instance, information about a private list-serve we moderate for all California programs, ourselves, local III-B offices and support centers. It is a convenient place for announcements, substantive queries and discussion of issues that affect us.

One such issue is that of funding. California does not allocate any state funds for senior legal services, and many programs are badly in need of more help. Toward the goal of remedying this, we again instigated legislation this year that if successful, will instruct the state Department of Aging to appoint and convene a task force to study the issue and produce a detailed proposal for subsequent legislation. Our hope is that eventually, this would lead to full funding for a statewide hotline and additional help to local programs, with a major emphasis on promoting coordination among them. This time, a more concerted effort by advocacy organizations and the bill’s author got the bill passed, and secured greater support from the Department of Aging. It awaits action by the governor, with a deadline of October 15. Even if it is vetoed in light of the state’s deepening pool of red ink, we are hopeful that the department will begin to take its responsibilities for supporting legal services, as mandated in the Older Americans Act, more seriously.

Educational projects undertaken in the past year with some of the other grants mentioned above include:

- Concerted outreach on energy issues amid the state's crisis. The original grant from the California Public Utilities Commission was meant to educate seniors about how to best take advantage of deregulation. With the collapse of that experiment for now, our efforts were dedicated toward informing especially low-income seniors about the various discount programs available to them and disseminating conservation tips. Meanwhile, the grant was renewed for a second year, with the main emphasis now on educating seniors to avoid scams, dangerous loans and other ripoffs when seeking to upgrade their homes' energy efficiency.
- We continue to offer special services to grandparents dealing with issues of custody or visitation of grandchildren. A small special grant enables us to service those under 60 as well. This funding ends at the end of 2001, however, and we are searching for replacements.
- The Sacramento County tobacco litigation settlement funds grant for public education on issues of planning for disability and long-term care was delayed until mid-2001, so we are still really getting started. It ended up being larger than anticipated, however.
- A parallel grant from The California Endowment for the same issues in the wider region has already led to the creation of a new advance health care directive packet, including our own form and instructions consistent with the new law on the subject that took effect July 1, 2000. The same material is also available in Spanish. Next up in this area is a series of detailed guides for seniors about Medi-Cal and long-term care.
- A small grant from the Foundation of the State Bar is leading to the development of additional client educational materials.

## **DISTRICT OF COLUMBIA**

The hotline maintained a total of 54 personnel intake hours per week.

All hotline attorneys attended AARP Diversity and Calendar training, as well as various sections of the Aging and Law Conference held in Arlington, Va., in October 2000. Various hotline attorneys attended seminars on the new District of Columbia Omnibus Trusts and estates amendments, professional ethics and predatory lending. Carol Matthews attended the NLADA conference again this year as a hotline representative.

Hotline attorneys continue to use the language line system for callers who are unable to communicate well in English.

The remaining several hundred older reduced fee panel cases were closed this year on an individual basis. All reduced fee panel cases are currently closed upon referral, as there is no reason to follow up.

Carol Matthews continues to produce significant work products for the National Hotline Technical Assistance Project, including a column for the Legal Hotline Quarterly, and completion of the second edition of the How to Manual for Hotlines.

On his own initiative, Al Herman implemented an appointment system for hotline callers who are difficult to reach. Up to ten appointments a week are available, with hotline attorneys calling at a pre-designated time agreed to by the caller. This has proved adequate for the number of hard to reach callers.

The Hotline continued to respond to 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 some forwarded from other AARP Headquarters departments.

Hotline attorneys participated in the development of, and are working to implement the Self-Help Offices (SHO) and Brief Services Unit (BSU), integrating those services with prompt hotline response. Elsie Frost assisted in development and testing of the database used by the SHO.

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

## **FLORIDA**

**The Florida Hotline has closed, due to lack of funds.**

## **GEORGIA**

The Hotline began a new three year grant to test our ability to uncover and address elder abuse, consumer fraud and benefits issues. We developed partnerships with Adult Protective Services, The State Attorney General's Office, The Governor's Office of Consumer Affairs and the Georgia Advocacy Office. All staff received special training in elder abuse identification and response as well as public benefits and predatory lending. The Hotline worked to secure ongoing state funding for basic hotline operations. This funding (\$150,000.00) is for the State fiscal year that began July 1, 2001. (The contract was delayed and we do not have the money in hand yet so I did not include it in our budget for the year.)

## **HAWAII**

Most of the significant events for the year seem to have centered around technology issues. Following a major grant from LSC for technological development, the year was spent purchasing and installing video conferencing equipment in the Honolulu, Hilo, Kahaluu and Kauai offices. With this new hardware, the Legal Aid Society of Hawai'i was able to offer "brief services" (such as clinics and document preparation and review) to clients who may be located in geographically isolated areas. The AOA grant that was awarded to LASH this year allowed us to offer these enhanced services to all seniors, including those who would not be eligible under regular LSC funding. The process of bringing this new technology on line has been at times frustrating (and expensive) due to lack of infrastructure and will continue for the next year, during which the Maui, Kona and Waianae offices will be brought on line. Also, during the next year, we will be partnering with the Hawai'i state Library System and developing a user-friendly web site to increase access to legal services. This is especially important on the neighbor islands where there is no public transportation and library facilities are accessible.

We have made a major push this year to do outreach. Because of cuts in traditional funding sources and the resulting exploration of alternative sources, The Legal Aid Society of Hawai'i has evolved into an organization which performs services that many people in the community are unaware of. We now have a ½ time community outreach facilitator to make these efforts more dynamic and cohesive. In the senior area, we have participated in the Senior Fair (with more than 20,000 attendees), AARP Grandparents day festival, a Veterans stand down, and a senior seminar held at the State Capitol and sponsored by the Hawai'i State Bar Association.

## **KANSAS**

- Continued operation.
- We're in the state budget for next year.

## **KENTUCKY**

The HelpLine experienced a change of managing attorneys this year. The HelpLine's original managing attorney, Dennis Stutsman left on November 1<sup>st</sup>, 2000 to accept a position with the Kentucky Department of Public Advocacy. Rita Caufield joined the Access to Justice Foundation as managing attorney on March 1, 2001. Rita has over ten years experience in legal services. Rita has expertise in family law, consumer law and bankruptcy. Her energy, experience and enthusiasm are a huge asset to the HelpLine.

The HelpLine Staff attorney attended the National Aging and Law Conference in October of 2000. The conference inspired several initiatives. Based on information gathered at the conference, a CLE training module on accessing in-home care was developed and presented. Materials gathered at the conference were used to develop training modules on financial exploitation of the elderly.

The HelpLine created an advertising campaign featuring prominent older Kentuckians by placing four print ads in rural newspapers in various areas of the state. In collaborations with the print ads, the attorney also wrote and submitted informative pieces on legal issues facing low-income seniors. These were published in tandem with the print ads. This campaign generated calls from rural areas in the state that had previously been untapped. The HelpLine plans to continue the print ad in conjunction with the substantive law information and add bulk mailing of HelpLine literature this coming year.

Part of the mission of the Legal HelpLine is to provide education aimed at helping citizens understand their legal rights and helping professionals assist clients in asserting their rights. To further this goal, the HelpLine is actively involved in community and professional education regarding the unique issues that impact our aging population. In

the 2000-2001 fiscal year the HelpLine staff attorney participated in 22 community outreach presentations and continuing legal education programs. These events provided training to well over 1550 people.

The HelpLine has noted an increase in the number of seniors who are experiencing financial problems. Many of these clients are having difficulties with credit cards and consumer debt. Some of these clients are the victims of predatory lenders. To help address some of these issues, the HelpLine is working with the Fayette County Bar Association's Bankruptcy Section to develop a special pro-bono referral panel on bankruptcy issues.

## **MARYLAND**

- **Weekly staff and training meetings expanded** – Each Thursday afternoon a Senior Hotline staff meeting and specialized training have been scheduled for all Hotline staff.
- **Individualized professional development training** – Developed and implemented a rotating schedule to allow full and part-time attorneys time away from the phones to visit other agencies, work as co-counsel on cases requiring representation, or pursue independent study.
- **Elder Law Section of the People's Law Library (PLL) website** – Expanded the Elder Law sections of the PLL – a public access website sponsored by MLAN and LAB.
- **Family Law Section of the People's Law Library website** – Created a new holistic interface and content for an expanded Domestic/Family Law section of the PLL with a new innovative self-diagnostic tool.
- **Landlord-Tenant Law Section of the People's Law Library website** – Totally revamped and expanded the Landlord-Tenant section of the PLL.
- **Domestic Violence Section of the People's Law Library** – This section now represents the joint efforts of the state's 21 domestic violence providers and is being developed with the intent to integrate the legal information and access to services for the older victims of battering through new efforts among the domestic violence shelters in conjunction with the adult protective services programs
- **Integration of "Sixty Plus" and Family Law Hotline services into the Senior Hotline** – Plans were implemented to expand the Senior Hotline to include these services for statewide access.
- **Hotline Outcomes Survey draft** – The Senior Hotline and MLAN drafted a survey tool and plan to assess the impact of hotline services upon the users. The draft is based upon an adaptation of the successful national model and is being reviewed by a local social science professional.
- **Client Satisfaction postcard designed** – A client satisfaction postcard and cover letter were designed to distribute to senior callers for them to assess the quality of service received.
- **Improved plan to handle all senior calls to Baltimore County** – A comprehensive plan with the III-B provider in Baltimore County was improved to instantly route all County senior callers to the Senior Hotline for assistance by telephone transfer, instead of by faxed phone messages.
- **Improved the Peoples Law Library (PLL) website ([www.Peoples-Law.org](http://www.Peoples-Law.org))** — Expanded and updated the Elder Law sections of the PLL — a public access website sponsored by MLAN and LAB. Also expanded the Family Law, Landlord/Tenant Law, and Domestic Violence sections.
- **Creation of a Guardianship Resource Center on MDJustice.org** — The password protected website for advocates was expanded to include a new resource center on guardianship issues.
- **Development of a pilot plan to outsource hotline telephone call routing** — Part of the statewide effort to link existing hotlines from multiple organizations.

- **Finalization of the intake screening software plan for the shared hotline interface**
- **www.MDJustice.org was re-launched** — Now includes some of the contents of the LAB's Intranet and new material on management, mediation, and multilingual access, so that this information can be shared with the wider audience of advocates and advocacy and support organizations throughout the state.
- **Village Learning Place Outreach** — Training was coordinated for library staff.
- **Nearly completed the LAB wide-area network (WAN)** — Now all but three of the Bureau's 13 offices and 20 of Maryland's 23 Title 111-B providers are connected in a statewide WAN, which will be fully installed in October.
- **Hypertext Substantive Law and Referral database (Intranet)** — In the implementation stage. Material still being collected and updated.
- **Web-enabled hypertext referral database** — General design completed. Requests for Proposals sent and the information to populate the database being collected.

## **MISSISSIPPI**

Two staff attorneys attended the Elder Law Seminar on the Coast in November and in June which was sponsored by North MS Rural Legal Services.

One attorney and a legal assistant attended the Sr. Expo in February and in September.

## **NEW HAMPSHIRE**

Major Staff Changes: The Senior Citizens Law Project Advice Line (Advice Line) has had only one major staffing change this report period. Our Intake Coordinator position is now filled by a single individual rather than being shared by three different people.

Initially, when the Advice Line began three years ago, we envisioned having senior volunteers staff the intake position. The three women we hired each worked between 9 and 12 hours per week. We encountered several problems with this job-sharing model. For example, the women were unable to take on any projects or provide any support staff functions other than answering the phone and inputting intakes. It was difficult for them to get to know the various senior organizations, advocates, referral procedures, etc. Also, they never felt as though they were a part of New Hampshire Legal Assistance and seemed to see themselves as outsiders.

Our new full-time Intake Coordinator, Sandra Sjolander, works 37.5 hours per week. This effectively adds an additional day of support staff since our previous model was only 30 hours per week. Sandra works during times when the Advice Line is not answered and as a result is able to provide some support staff functions in addition to what was previously provided by our part-timers. One goal we have for the next fiscal year is to enhance our follow-up procedures. We believe we will be able to accomplish this with Sandra's help.

**Projects Accomplished:** New Hampshire has one of the lowest rates of participation in the Qualified Medicare beneficiary/Specified Low-Income Medicare Beneficiary (QMB/SLMB) programs in the country. This problem has become quite evident to the Advice Line attorneys as a result of talking to a large volume of New Hampshire senior citizens; many of whom are low-income. The attorneys continue to find individuals who are eligible for these programs but are not receiving benefits.

As a result, Attorney Driscoll began heading up a QMB/SLMB Work Group to identify the extent of the problem, possible solutions, and a means of resolution. After many discussions with individuals interested in the QMB/SLMB issue, Attorney Driscoll determined that there is a need for a Work Group to investigate potential issues contributing to low enrollment such as outreach. The workgroup will continue to meet over the foreseeable future until an acceptable resolution is reached.

## **NEW MEXICO**

In addition to regular hotline duties, the Lawyer Referral for the Elderly Program (LREP) participates in the nursing home litigation task force and coordinates with other legal services providers and agencies to give and take referrals from the Ombudsman program, HIBAC, the Senior Citizen's Law Office, and Community and Indian Legal Services of Northern NM (CILS). Through the long-term litigation task force, referrals are made to private attorneys for cases involving long-term care abuse or neglect. Some of the cases are litigated by the private bar attorneys. Families are provided with an opportunity to discuss their concerns with attorneys who are experienced in this area of law.

A primary extended focus of LREP is in doing outreach by giving legal workshops and clinics at senior centers throughout the state. Attorneys then meet individually with participants to address their legal matters. Private attorneys will occasionally assist the LREP attorneys in providing legal consultations to participants at the senior centers, thus allowing more participants the opportunity to meet privately with attorneys. During the workshop presentation, participants are given basic legal information in the areas of institutional care, Medicaid for long-term care, estate planning and consumer issues. A major problem for the elderly in New Mexico is with creditors.

## **OHIO**

Major staff change: Rhoda Y. Moore became the new Executive Director of Pro Seniors, Inc. on January 29, 2001.

## **PUERTO RICO**

During this year we coordinated with the Police Department of Puerto Rico a program of conferences on La2 121 Bill of Rights for the Elderly. We went to each of the Regional Headquarters on the island to offer agents of the police department a seminar which included a discussion of the law and a description of the demographic and socio-economic characteristics of the population. The purpose of this activity was to create a consciousness among police officials about the needs and rights of the older population so that could increase the effectiveness of their intervention.

## **TENNESSEE**

Despite diligent effort to build statewide support and obtaining supportive letters from the Tennessee Bar Association and the Tennessee Commission on Aging, we were not successful in securing continued funding from the Administration of Aging. We have cut services on the Hotline to only serve those in our 10-county LSC service area.

## **TEXAS**

The Legal Hotline for Older Texans has been very busy this year. In January LHOT hosted 11.75 hours of CLE credit for its attorneys. In February, LHOT attorneys received another 1.75 hours of CLE. In March our managing attorney testified before the Texas House Judiciary Committee on HB 1420. In April, Roger Curme and Bruce Bower held a "Border Training" project. This was instruction for AAA directors from border Area Agencies on Aging. Our LHOT attorneys also received another 1.5 hours of CLE training. On June 16, several LHOT attorneys volunteered to take calls from flood victims in Houston for FEMA. Five separate trainings (in Waco, Dallas, San Antonio, McAllen and Abilene) were given by Roger Curme and Bruce Bower in August on Family Caregiving.

## **WASHINGTON**

CLEAR\*Sr is a statewide toll-free access system for people 60 years of age and older to obtain free legal assistance with civil legal problems. In addition to providing its telephone intake services, CLEAR\*Sr began a new project in 2000 under a 3-year grant from AoA. The aim of the project is to develop ways to educate seniors about consumer law issues so that they might identify legal problems before they become emergent. The project is essentially three-tiered, focusing on updating and creating informational brochures, "issue spotting," and advocate training.

- **Information Brochures**

During the first year of grant work, several consumer information brochures have been drafted and are proceeding to final form. Topics include purchasing property, scams, ID theft, home contractor issues, autos/mobile home purchases, debt prioritization, and problems with bounced checks. CLEAR\*Sr has also been collecting consumer related brochures from other agencies for dissemination to clients.

- **Issue Spotting**

### **Consumer Checkups**

Consumer checkups are quick interviews about consumer issues offered to CLEAR\*Sr clients, who call in with consumer related concerns. After a CLEAR\*Sr advocate conducts an intake, gives advice, service and/or referral, he/she asks the client for permission to make a follow-up call to talk about other possible consumer issues that might be affecting the client.

- **Issue Spotting Trainings**

These trainings include information sessions about consumer issues affecting seniors. The CLEAR\*Sr project manager was out of the office on maternity leave during September and October of 2001, but has returned and has begun scheduling these sessions for senior client advocates, including those who serve the immigrant, Native American and farm worker communities.

- **Advocate Training/Pilot Project**

CLEAR\*Sr has been working with the local volunteer lawyer programs in Snohomish and Yakima counties to coordinate CLE trainings on consumer related issues. Private attorneys from these two counties, as well as those from surrounding areas will be invited to attend training in either Everett or Yakima in early March 2002. A representative from the National Consumer Law Center will be on hand to provide the trainings, which will include case analysis of fair debt collection, rent-to-own contracts, check cashing services and loans in anticipation of SSI or SS benefits.

Throughout the first year of the project, CLEAR\*Sr has been collaborating with several agencies and senior organizations to discuss consumer education, referrals, case strategies and service for our senior clients. In addition to the National Consumer Law Center, representatives from the State Attorney General's office, FTC, Department of the Treasury, State Department of Labor and Industries, several Sr. I&A offices and other senior organizations have all contributed to CLEAR\*Sr's efforts to improve client awareness of consumer legal issues. Going forward, CLEAR\*Sr will continue statewide outreach efforts to agencies and advocates to familiarize them with the program and project work.

### **WEST VIRGINIA**

- Secured 210 hours of pro bono representation for seniors.
- Updated FAQ manual and posted it on our new website ([www.seniorlegalaid.org](http://www.seniorlegalaid.org)).
- Created intranet for staff and board, including synchronizing with office calendar in Outlook.
- Conducted many outreach sessions including presentations at Title V employee trainings and a private corporate employer wellness program among others.
- Worked with a Geriatric Care Manager at a private elderlaw firm, towards developing a holistic tool for intake.