

SENIOR LEGAL HOTLINES

ANNUAL REPORT

OCTOBER 1, 2001 - SEPTEMBER 30, 2002



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

Contents

Contents	<i>i.</i>
Summary	1
Number of Hotlines 1985-2002	2
Statewide Legal Hotlines Households, Calls, Cases Bar Chart.....	3
12 month Productivity	4
Comparisons (2001 report, 2002 report) for each hotline.....	6
Hotline Advocates	8
Case Types	10
Services	11
Costs/Income	12
Significant Events.....	14



Legal Hotlines

Twenty of the senior legal hotlines reported their statistics to the AARP Foundation in 2002. This year the number of statewide legal hotlines dedicated to the serving seniors numbered 22; 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 Southeast Tennessee Legal Services ceased its hotline services this year because of lack of funds.

The Administration on Aging held its annual grant competition for Senior Statewide Legal Hotlines in Spring 2002. As a result, five established hotlines and three new hotlines received grants for various innovative hotline projects. The established hotline winners were Access to Justice Legal HelpLine for Older Kentuckians, Maine Legal Services for the Elderly Hotline, Legal Counsel for the Elderly Hotline in D.C., Elder Law of Michigan Legal Hotline for Michigan Seniors, and Maryland Legal Aid Bureau Senior Legal Hotline. New hotlines were funded at South Carolina Centers for Equal Justice where the Serve Our Seniors Telephone Hotline will be operated as part of the Legal Aid Telephone Intake Service Center, the Idaho Senior Legal Hotline will operate at Idaho Legal Aid Services and Connecticut Legal Services will run the Consumer Law Project for Elders hotline.

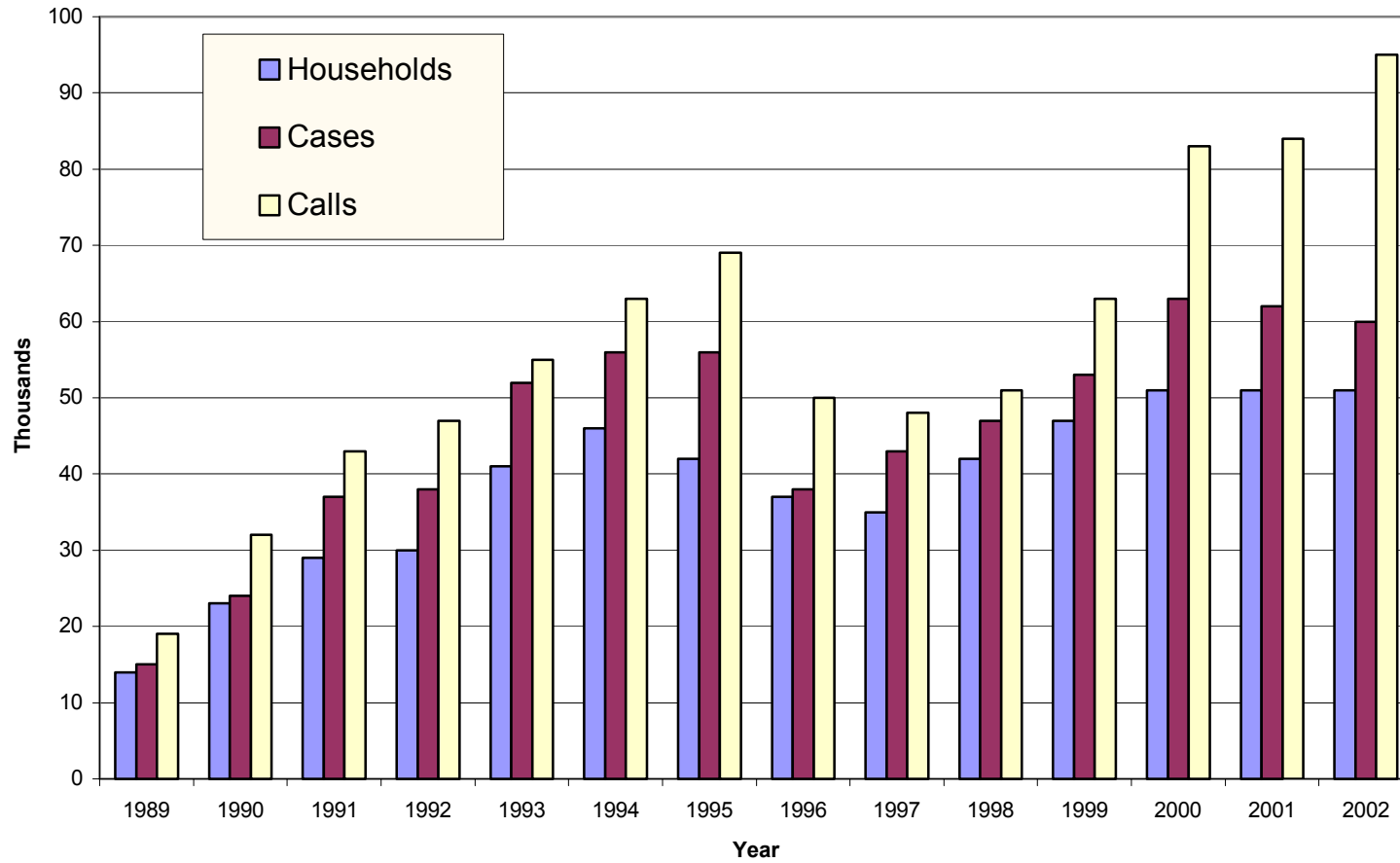
This year the 20 reporting senior hotlines handled more than 94,500 calls and closed more than 60,000 cases. Almost 51,000 households were served. Consumer matters were the most frequent topics of hotline calls (21%), following by wills and advance planning (19%), housing issues (16%), legal issues related to health care (14%) and family matters (8%).

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 support to the senior legal hotlines, legal aid hotlines and many programs planning hotlines. The Project also publishes the Legal Hotline Quarterly, collects hotline related documents for cataloging at the Legal Hotline Technical Support Library, develops hotline related workshops at national legal services conferences and conducts hotline surveys and outcome studies.

The Project maintains a website at www.legalhotlines.org. The website features online searchable directories of legal hotlines and related programs, the Legal Hotline Library, as well as hotline profiles, manuals, ABA Model Rules, articles, studies, and reports on legal hotline matters. This year the Foundation produced a training video for hotline developers entitled "A Visit to Legal Counsel for the Elderly". It can be ordered on cassette or viewed online at legalhotlines.org. The Project also published *Legal Hotlines: A How to Manual 2d Edition*, a comprehensive guide to planning, implementing, operating, and evaluating a legal hotline. The Technical Assistance Project can be reached at 954-472-0997 or rose99@attbi.com

Legal Hotlines

Growth by Year



Legal Hotlines

Statistics FY 2002

formula	AZ	*CA*	DC	GA	HI	IA	IN	KS	KY	MD	*ME*	MI
Households Year Total	2,592	6,305	1,633	3,111	806	2,473	353	2,028	1,739	1,756	1,712	3,818
A Cases Year Total	3,240	7,654	2,126	3,889	1,499	2,720	441	2,157	2,172	2,195	1,865	4,485
B Calls Year Total	5,979	15,743	2,785	10,906	2,729	2,720	578	2,205	3,388	2,875	5,222	4,054
C: Avg FTE Paid Staff	1.75	6.2	1.5	3.75	1.5	2.15	1	1.14	2	7.1	4	2
D Avg FTE Volunteers	0	1.7	0	0.5	0	0.1	0	0.33	1	0	0	0
E: Total FTE C+D	1.75	7.9	1.5	4.25	1.5	2.25	1	1.47	3	7.1	4	2
Cases per FTIA/C	1,851	1,235	1,417	1,037	999	1,265	441	1,892	1,086	309	466	2,243
% time Paid S C/E	100.00%	78.48%	100.00%	88.24%	100.00%	95.56%	100.00%	77.55%	66.67%	100.00%	100.00%	100.00%
% time Voluntd/E	0.00%	21.52%	0.00%	11.76%	0.00%	4.44%		22.45%	33.33%	0.00%	0.00%	0.00%
Cases/hr (paid (A/C)/2000	0.93	0.62	0.71	0.52	0.5	0.63	0.22	0.95	0.54	0.15	0.23	1.12
Calls/hr (paid : (B/C)/2000	1.71	1.27	0.93	1.45	0.91	0.63	0.29	0.97	0.85	0.2	0.65	1.01
F: Hotline Cost		\$368,325		\$271,350	\$46,670	\$188,822		\$52,897	\$110,000	\$289,639	\$248,422	\$190,971
Cost/ Case F/A		\$48.12		\$69.77	\$31.13	\$69.42		\$24.52	\$50.64	\$131.95	\$133.20	\$42.58
Cost/ Call F/B		\$23.40		\$24.88	\$17.10	\$69.42		\$23.99	\$32.47	\$100.74	\$47.57	\$47.11

Some figures are estimates based on ratio of Households/Cases (0.80); Calls/Cases (1.31) in 2002 (11 hotlines reported all three).

Avg Total Cost/Case and Avg Total Cost/Call is based on the total cases (46,612) and total calls (76,348) of the 16 hotlines which reported their Hotline Cost.

Hotline Cost does not include in-kind volunteer support in CA=\$94,937.

ME call total does not include 3814 SHIP calls.

Mississippi and Puerto Rico did not report.

Legal Hotlines

	Statistics FY 2002											
	MS	NH	NM	OH	PA	PR	TX	WA	WV	WY	Totals (20)	Average
Households Year Total		1,519	3,309	4,708	3,878		5,966	2,379	580	226	50,891	2,545
A Cases Year Total		1,899	3,309	5,423	3,878		7,962	2,460	725	282	60,381	3,019
B Calls Year Total		2,488	10,147	5,857	4,032		8,823	2,750	950	282	94,513	4,726
C: Avg FTE Paid Staff		2	3.25	1.8	0.3		2.4	1.9	1	0.5	47.24	2.36
D Avg FTE Volunteers		0	0.5	0.1	0		0	0	0	0	4.23	0.21
E: Total FTE		2	3.75	1.9	0.3		2.4	1.9	1	0.5	51.47	2.57
Cases per FTE Staff		950	1,018	3,013	12,927		3,318	1,295	725	564		1,278
% time Paid Staff		100.00%	92.00%	94.74%	100.00%		100.00%	100.00%	100.00%	100.00%		91.78%
% time Volunteers		0.00%	8.00%	5.26%	0.00%		0.00%	0.00%	0.00%	0.00%		8.22%
Cases/hr (paid staff)		0.47	0.51	1.51	6.46		1.7	0.65	0.36	0.28		0.64
Calls/hr (paid staff)		0.62	1.56	1.63	6.72		1.89	0.72	0.48	0.28		1.00
F: Hotline Cost		\$161,350	\$238,743	\$242,852	\$53,627		\$203,723	\$173,114	\$25,000		16 states \$ 2,865,505	Average \$179,094
Cost/ Case		\$84.97	\$72.15	\$44.78	\$13.83		\$82.81	\$238.78	\$88.65			\$61.48
Cost/ Call		\$64.85	\$73.53	\$41.46	\$13.30		\$74.08	\$182.23	\$88.65			\$37.53

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

Avg Total Cost/Case and Avg Total Cost/Call is based on the total cases (46,612) and total calls (76,348) of the 16 hotlines which reported their Hotline Cost.

Hotline Cost does not include in-kind volunteer support in CA=\$94,937.

Legal Hotlines

		AZ	CA*	DC	GA	HI	IA	IN	KS	KY	MD	ME	MI
Households served	01	2,643	5,982	1,826	3,450	741	1,958		2,344	1,513	1,686	2,219	3,906
	02	2,592	6,305	1,633	3,111	806	2,473	353	2,028	1,739	1,756	1,712	3,818
Cases handled	01	3,073	7,194	2,566	4,074	1,354	2,180		2,448	1,898	1,960	2,304	4,349
	02	3,240	7,654	2,126	3,889	1,499	2,720	441	2,157	2,172	2,195	1,865	4,485
Calls handled	01	4,179	14,891	3,106	7,741	2,324	2,180		2,725	2,279	2,666	3,456	5,915
	02	5,979	15,743	2,785	10,906	2,729	2,720	578	2,205	3,388	2,875	5,222	4,054
Average cases/hr (paid staff only)	01	0.88	0.62	0.83	0.51	0.45	0.31		4.08	0.47	0.55	0.33	1.09
	02	0.93	0.62	0.71	0.52	0.50	0.63	0.22	0.95	0.54	0.15	0.23	1.12
Average calls/hr (paid staff only)	01	1.19	1.28	1.01	0.97	0.77	0.31		4.54	0.57	0.75	0.49	1.48
	02	1.71	1.27	0.93	1.45	0.91	0.63	0.29	0.97	0.85	0.20	0.65	1.01

		MS	NH	NM	OH	PA	PR	TX	WA	WV	WY	TOTALS
Households served	01	366	1,545	2,668	4,508	3,587	1,239	5,356	2,079	901	227	50,744
	02		1,519	3,309	4,708	3,878		5,966	2,379	580	226	50,891
Cases handled	01	373	1,796	5,330	5,247	3,587	1,441	6,916	2,079	1,048	264	61,481
	02		1,899	3,309	5,423	3,878		7,962	2,460	725	282	60,381
Calls handled	01	377	2,334	5,992	5,667	3,703	1,960	7,541	2,349	1,425	359	83,169
	02		2,488	10,147	5,857	4,032		8,823	2,750	950	282	94,513
Average cases/hr (Paid staff only)	01	0.75	0.45	1.03	1.14	5.98	0.21	1.73	0.55	0.35	0.26	0.67
	02		0.47	0.10	1.51	6.46		1.70	0.65	0.36	0.28	0.64
Average calls/hr (Paid staff only)	01	0.75	0.58	1.15	1.23	6.17	0.28	1.89	0.62	0.48	0.36	0.91
	02		0.62	1.56	1.63	6.72		1.89	0.72	0.48	0.28	1.00

Some figures are estimates based on ratio: in 2002: Households = 0.8*Cases; Calls = 1.31*Cases,
in 2001: Households=0.86*Cases; Calls=1.36*Cases

Legal Hotlines

FINANCIAL COMPARISON OF 2001 AND 2002

		AZ	CA*	GA	HI	IA	KS	KY	MD	ME
Total cost	01	\$95,000	\$336,869	\$152,000	\$46,670		\$45,125	\$100,000	\$165,901	\$269,742
	02		\$368,325	\$271,350	\$46,670	\$188,822	\$52,897	\$110,000	\$289,639	\$248,422
Total project-generated income (Reduced fee panel, donations and fees)	01		\$16,484	\$1,000						
	02		\$16,087	\$1,200						
Gross cost/case	01	\$30.91	\$46.83	\$37.31	\$34.47		\$18.43	\$52.69	\$84.64	\$117.08
	02		\$48.12	\$69.77	\$31.13	\$69.42	\$24.52	\$32.23	\$131.95	\$133.20
Net cost/case	01	\$30.91	\$44.54	\$37.06	\$34.47		\$18.43	\$52.69	\$84.64	\$117.08
	02		\$46.02	\$69.47	\$31.13	\$69.42	\$24.52	\$32.47	\$131.95	\$133.20

		MI	NH	NM	OH	PA	WA	WV	WY	TOTALS
Total cost	01	\$266,500	\$166,306	\$233,500	\$199,285	\$56,513	\$151,000	\$210,000	new	\$2,494,411
	02	\$190,971	\$161,350	\$238,743	\$242,852	\$53,627	\$203,723	\$173,114	\$25,000	\$2,865,505
Total project-generated income (Reduced fee panel, donations and fees)	01	\$68,000			\$5,321	\$9,254				\$100,059
	02	\$3,200	\$25,000		\$2,945	\$11,158		\$4,702		\$64,292
Gross cost/case	01	\$61.28	\$92.60	\$43.81	\$37.98	\$15.75	\$72.63	\$200.38	new	\$40.57
	02	\$42.58	\$84.97	\$72.15	\$44.78	\$13.83	\$82.81	\$238.78	\$88.65	\$61.48
Net cost/case	01	\$45.64	\$92.60	\$43.81	\$36.97	\$13.18	\$72.63	\$200.38	new	\$38.94
	02	\$41.87	\$71.80	\$72.15	\$44.24	\$10.95	\$82.81	\$232.29	\$88.65	\$60.10

***Gross Cost** does not include in-kind volunteer support in CA=\$94,937.

***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.

hrs based on 40 hours per week for 50 weeks per FTE including hours that attorneys are working at other tasks.

Legal Hotlines

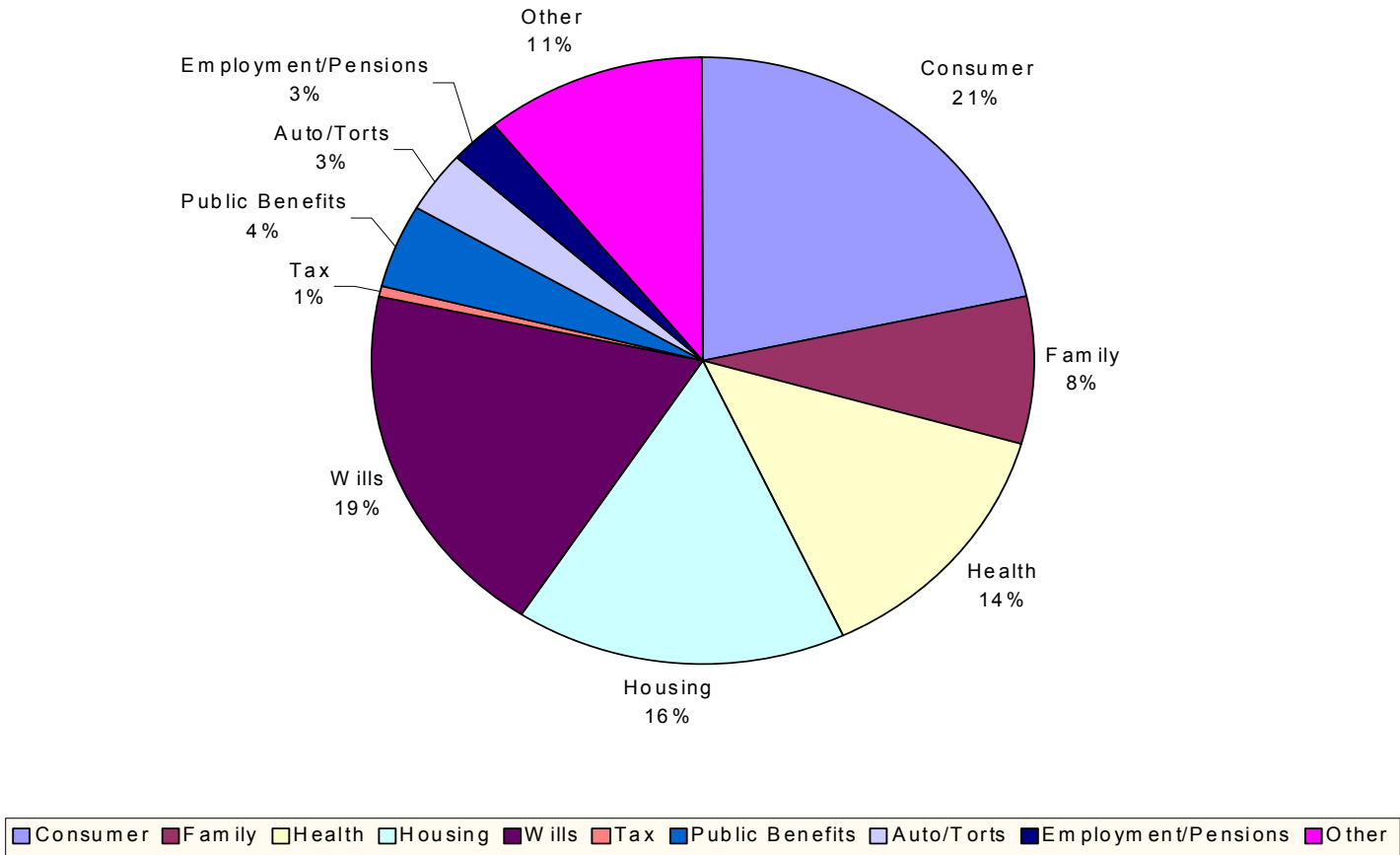
	AZ	CA	DC	GA	HI	IA	IN	KS	KY	MD	ME	MI	MS	NH	NM	OH	PA	PR	TX	WA	WV	WY	TOTAL	AVG	
Avg FTE Paid																									
Attorneys	0.75	3.00	1.50	3.75	1.00	2.00	1.00	0.33	2.00	6.70	3.00	2.00	0.25	2.00	2.75	1.80	0.30	3.50	2.00	1.90	1.00	0.50	43.03	1.96	
Paralegals	1.00	3.20			0.50			0.01		0.40	1.00				0.50									6.61	0.30
Law Students						0.15			1.00															1.15	0.05
support staff																				0.50				0.50	0.02
intake								0.80						0.77		0.50								2.07	0.09
Avg FTE Volunteers																									
Attorneys		0.90		0.25		0.10		0.33							0.50	0.10								2.18	0.10
Paralegals		0.20																						0.20	0.01
Law Students		0.30		0.25					0.25															0.80	0.04
Other (please specify)																									
social workers/studen	0.30								0.25															0.55	0.03
intake															0.25		0.75							1.00	0.05
# Paid (year end)																									
Attorneys	2	4	6	8	9	3	1	3	2	8	5	3	5	2	3	7	1	2	11	2	2	1	89.90	4.09	
Paralegals	1	5		1	7			1		1	1				3			1				1	21.75	0.99	
Law Students																									
intake								4								1				1			6.00	0.27	
# Volunteers (year end)																									
Attorneys		29		1		1		107							2	1							141.00	6.41	
Paralegals		5			1																		6.00	0.27	
Law Students		2		2	1				15		1												21.00	0.95	
social workers/studen	2																						2.00	0.09	

Legal Hotlines

	AZ	CA	DC	GA	HI	IA	IN	KS	KY	MD	ME	MI	MS	NH	NM	OH	PA	PR	TX	WA	WV	WY	TOTAL	AVG	
# Paid-Added during year																									
Attorneys				2	2	1		2	1	1	2								4				15	0.81	
Paralegals		2		1	4																		7	0.39	
Law Students																							0	0	
# Volunteers-Added during year																									
Attorneys		15				1																	16	0.89	
Paralegals		3																					3	0.17	
Law Students		3		3					15		1												22	1.22	
social workers/st		1							1														2	0.11	
# Paid-Dropped during year																									
Attorneys				1	1	1		2	1	1	1								2				10	0.56	
Paralegals					4															1			5	0.28	
Law Students																							0	0	
# Volunteers-Dropped during year																									
Attorneys		6						7												2			15	0.83	
Paralegals					2																		2	0.11	
Law Students		2		1	2						1												6	0.33	
social workers/st		2																					2	0.11	
intake																									
year report	2001	2002	2002	2002	2002	2002	2002	2002	2002	2002	2002	2002	2001	2001	2002	2002	2002	2001	2002	2002	2002	2001			

Legal Hotlines

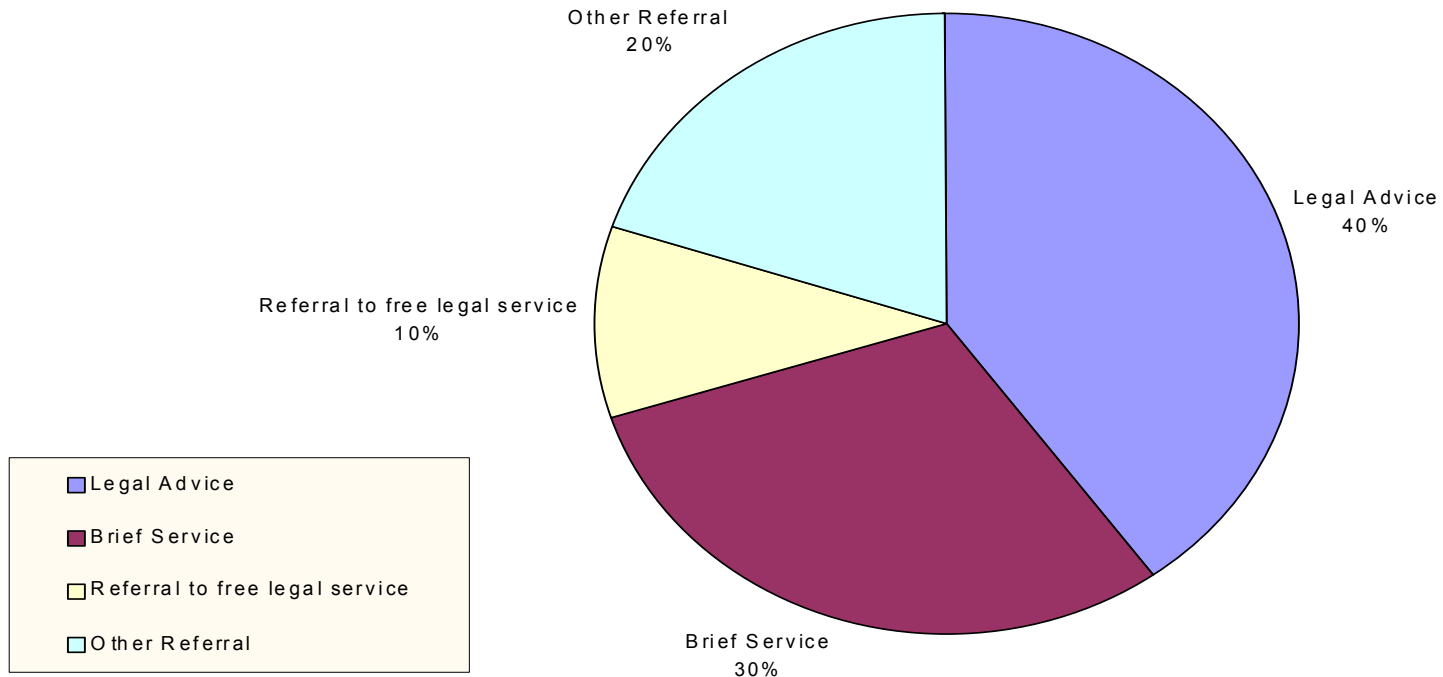
% Total Case Types Reported



Based on Statistics from 16 Hotlines

Legal Hotlines

Services Provided by Reporting Hotlines
Hotlines also send Publications related to client's legal concerns



Based on Statistics from 16 Hotlines

**SENIOR LEGAL HOTLINES
TOTAL COST, FUNDING SOURCES
October 1, 2001 – September 30, 2002**

ARIZONA (2001)

TOTAL COST\$ 95,000

FUNDING SOURCES

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

CALIFORNIA-2002

TOTAL COST\$368,325

FUNDING SOURCES

Administration on Aging.....\$ 95,000
 Area Agency on Aging (various projects).....\$ 99,401
 Legal Services (in-kind from parent agency)..... \$ 33,074
 County tobacco litigation funds \$ 65,741
 Foundation grants for special Projects.....\$ 59,022
 Donations..... \$ 14,517
 Misc. (training revenue, materials Fees..... \$ 1,570

(In-Kind Support (volunteers) not included in total above..... \$ 94,937)
 Total \$ 463,262

GEORGIA 2002

TOTAL COST\$ 271,350

FUNDING SOURCES

Administration on Aging.....\$ 110,000
 State Department on Aging... \$ 146,250
 Donations.....\$ 1,200
 In-Kind Support from Division of Aging.....\$ 13,900

HAWAII 2002

TOTAL COST\$ 46,670

FUNDING SOURCES

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

IOWA 2002

TOTAL COST..... \$188,822

FUNDING SOURCES

Administration on Aging.....\$100,000
 Area Agency on Aging.....\$ 24,000
 IO(L)TA.....\$ 24,368
 State Bar..... \$ 20,454
 Iowa Executive Council..... \$ 20,000

KANSAS 2002

TOTAL COST\$ 52,897

FUNDING SOURCES

Legal Services.....\$ 20,897
 IO(L)TA..... \$ 32,000

KENTUCKY 2002

TOTAL COST \$ 110,000

FUNDING SOURCES

Administration on Aging..... \$ 95,000
 Access to Justice Foundation Association of Older Kentuckians..... \$ 15,000

MARYLAND 2002

TOTAL COST\$ 289,639

FUNDING SOURCES

Administration on Aging.... \$ 127,317
 Maryland Legal Assistance Network – matching funds.....\$ 15,300
 Legal Aid Bureau..... \$ 147,022

MAINE 2002

TOTAL COST \$ 248,422

FUNDING SOURCES

Administration on Aging... \$ 95,000
 State Department on Aging*\$ 114,650
 Area Agency on Aging.....\$ 4,000
 C.M.S.....\$ 24,772
 United Way.....\$ 10,000
 * Also includes overall program support from IOLTA and Maine Civil Legal Services Fund.

**SENIOR LEGAL HOTLINES
TOTAL COST, FUNDING SOURCES
October 1, 2001 – September 30, 2002**

MICHIGAN 2002

TOTAL COST\$ 190,971

FUNDING SOURCES

Administration on Aging..... \$ 70,000
 State Department on Aging \$ 20,877
 IO(L)TA..... \$ 51,000
 In-Kind Support from
 Volunteers\$ 3,200
 In-Kind Support from Michigan
 State Bar Foundation..... \$ 4,000
 In-Kind Support from Michigan
 Office of Services to the Aging \$41,894

NEW HAMPSHIRE 2002

TOTAL COST\$161,350

FUNDING SOURCES

IO(L)TA.....\$ 31,174
 Donations (Lawyer Fundraising)\$ 25,000
 Title IIIB Funds..... \$ 80,176
 United Way..... \$ 25,000

NEW MEXICO 2002

TOTAL COST \$238,743

FUNDING SOURCES

State Department on Aging.... \$192,180
 State Bar..... \$ 46,563

OHIO 2002

TOTAL COST \$242,852

FUNDING SOURCES

Administration on Aging
 (Pension Rights Project) .. \$ 65,738
 State Department on Aging.... \$ 63,825
 IO(L)TA..... \$ 67,952
 Client Fees..... \$ 2,945
 United Way..... \$ 35,607
 In-Kind Support (volunteers)\$ 6,785

PENNSYLVANIA 2002

TOTAL COST \$ 53,627

FUNDING SOURCES

AARP \$ 42,469
 Client Fees..... \$ 11,158

TEXAS (2000)

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

FUNDING SOURCES

State Department on Aging\$174,097
 IO(L)TA (BCLS)..... \$137,458
 Donations..... \$ 102
 Client Fees (Referral Fees)\$ 3,140

WASHINGTON 2002

TOTAL COST \$203,723

FUNDING SOURCES

State Department on Aging\$109,233
 IO(L)TA \$ 94,490

WEST VIRGINIA 2002

TOTAL COST..... \$173,114

(Funding sources were greater than total cost.)

FUNDING SOURCES

Administration on Aging
 Title IIIB..... \$ 88,451
 AoA Title IV..... \$ 48,628
 IO(L)TA \$ 30,662
 Program Income \$ 4,702
 LTC Ombuds \$ 13,344
 5K Race \$ 3,600
 Fellowship \$ 3,100

WYOMING 2002

TOTAL COST..... \$ 25,000

FUNDING SOURCES

State Department on Aging\$ 21,000
 Legal Services \$ 4,000

**SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2001 – September 30, 2002**

CALIFORNIA - 2002

- Continued increases in total numbers of clients served, percentage outside Sacramento County, efficiency indicators (cases per hour, etc.).
- No departures among staff advocates; two new part time paralegals added; additional hours for two part-time attorneys and one part-time support staff; additional volunteers of various categories.
- Enactment of state legislation creating a state task force to study legal services for seniors. Hotline manager appointed to task force, which met six times, March – August. Report delivered to Legislature calls for, among other things, state support of a statewide Senior Legal Hotline.
- Our program of special services for grandparents dealing with issues of custody or visitation of grandchildren has grown and changed. Increased support from our local area agency on aging (covering seven counties) is making possible a lot more outreach and clinic work. But we are no longer able to serve those under 60 a high percentage of people facing these situations. We are seeking special funding to resume this aspect of the program.
- Two small grants have gotten us started on a project to develop serious multilingual capacity. We have spoken with leaders of a number of community organizations and are now in the process of scheduling a training for our future corps of on-call phone interpreters.
- We have continued to produce new client educational materials and self-help packets, steadily enlarging our supply.
- Despite all these developments, our immediate future is in grave doubt. Due to a communications problem at AOA, our application for a new three-year grant was not one of those selected.

DISTRICT OF COLUMBIA - 2002

- LCE created a “Brief Services Unit.” The hotline referred all non-emergency cases needing further development or additional services to the Brief Services Unit. In prior years, such cases would generally have either remained with the hotline or been scheduled for appointments with staff attorneys.
- Beginning April 1, 2002, the hotline fully implemented a system whereby support staff entered all demographic information for callers, freeing up hotline attorneys to return all calls within the same day or the morning after.
- A hotline client satisfaction survey was conducted in which clients registered a significantly higher satisfaction with the hotline in terms of promptness of getting through to a hotline attorney compared to the FY 2000 survey. Other satisfaction ratings were very similar to results in past surveys.
- Hotline attorneys performed a “back-up” function for recently established “self-help” offices, providing additional information and advice where needed. Hotline attorneys gave the self-help office calls priority over other calls.

GEORGIA – 2002

- During this time period, the Georgia Senior Legal Hotline began receiving state funding through the Department of Human Resources for hotline operations. This appropriation enabled us to expand services and outreach into rural parts of the state.
- We moved to an ASP version of our case management software, which has enabled us to use staff and volunteers who are located throughout the state.
- On a substantive level, we identified systemic problems related to gas deregulation that resulted in many poor seniors’ loss of gas service (and heat) during the cold winter months. Staff worked with staff from state agencies to highlight the problems our clients face, assess regulatory and legislative solutions, and publicize available gas assistance programs and services.
- We continued to screen callers for other benefits for which they may be eligible and to assist clients with applications where indicated.

HAWAII - 2002

- Technology advances again dominated the last fiscal year. We continued to expand our video conferencing capabilities throughout the islands by adding our Wailuku (on Maui), Kona (on Hawai’i, also known as the Big Island) and Waianae (on Oahu) offices to the network. We are now able to communicate in a much better way with both our clients and cohorts in this uniquely isolated environment.
- The web site for the Legal Aid Society of Hawai’i (www.legalaidhawaii.org/) was officially launched at the beginning of this year. As with most web sites, we have discovered that there is no end to the development necessary to keep it both up

SENIOR LEGAL HOTLINES SIGNIFICANT EVENTS October 1, 2001 – September 30, 2002

to date and innovative. The web site contains a special Senior section with links to other Senior specific web sites and organizations.

- We have again spent considerable time and personnel on outreach. Our ½ time community outreach facilitator has turned into a full time position. Our experience with the local community tells us that there is no more effective outreach method than grass roots face-to-face contact with the potential clients. We have made a conscientious effort to have a presence at every community event and supply speakers for groups of any size. Our outreach has paid off – we increased our number of cases for Seniors by over 10% within the last year.

IOWA - 2002

- The Hotline made substantial progress with its Outreach Demonstration Project, which will identify the best outreach methods.
- The Hotline's Health Law Project continues to show that older adults, service providers and attorneys still need a lot of education about Medicaid health care programs.
- Substantial progress has been made in setting up the Hotline's website and in implementing the Senior Citizens Internet Project, which is placing Internet-ready computers in 85 Iowa senior centers. This project will greatly increase the dissemination of legal information to older Iowans.

KANSAS - 2002

- We have prepared for a new volunteer attorney recruitment effort. This effort will begin October 2002. We hope to add 35 new volunteer attorneys. We receive financial support from IOLTA and continue to coordinate with Title III B funded attorneys in the state.

KENTUCKY - 2002

- The year saw no changes in paid HelpLine staff. In the past year we had 15 Brandeis School of Law student volunteers who fulfilled their community-service requirement by researching and writing outlines of the law in a number of substantive areas. These outlines serve as references in the drafting of Frequent Intake Questions to help our staff and Kentucky legal services attorneys obtain information and give appropriate advice over the telephone. These additional volunteers allowed us to make significant progress in developing and distributing consumer education and outreach materials
- The HelpLine has seen a significant increase in the number of callers with unmanageable credit card debt. This trend is a result of increased access to credit by consumers who are not credit worthy. The typical client presenting this issue has been widowed for 4-5 years, and has total credit card debt of about \$40,000.00. In most cases the client resorted to using credit cards to compensate for the loss of income suffered when their spouse died (for low income clients they typically suffer a 40% loss of income as the result of the death of a spouse.) There has been a 38% increase over last year in the proportion of callers seeking information or help concerning bankruptcy (55 callers). In absolute numbers, nearly twice as many people inquired about bankruptcy this year as two years ago (October 1999-September 2000).
- The largest percentage of our calls concern Medicaid and other Health matters (30.6%); Wills & Estates (20%); and Guardianship (8%). In the past year, inquiries about Medicare actually decreased to less than 1% of total calls, but questions concerning Medicaid and other health matters, principally the high cost of prescription drugs, have been increasing disproportionately.
- This has been a tumultuous year for our partners in the legal aid community with program mergers, the retirement of several key staff members, and looming budget cuts. Our legal aid partners are facing over \$1.529 million dollars in budget cuts over the next year and are in the process of eliminating staff and closing offices. The HelpLine is one resource available to help some of the clients that our legal aid partners are being forced to turn away due to limited staffing. We anticipate the HelpLine playing a larger role in overall service provision in Kentucky in the coming year as a result of these losses by our legal aid partners.
- The HelpLine staff attorney, David Godfrey has been involved in elder abuse education and prevention on several levels in the past year. He was a member of a statewide interdisciplinary elder abuse prevention committee. The committee concluded its work this year, resulting in the appointment of a permanent Elder Abuse Prevention Commission by the Governor of Kentucky. He has also been active in presenting trainings for the AARP Foundation National Training Project, resulting in knowledge that has enabled the HelpLine to present several workshops on Elder Abuse and Financial Exploitation here in Kentucky. In February of 2002, the HelpLine hosted an AARP NTP training on Elder Abuse,

SENIOR LEGAL HOTLINES SIGNIFICANT EVENTS October 1, 2001 – September 30, 2002

Medicare and advocacy skills in Kentucky. This training resulted in several new attorneys being added to the HelpLine's pro-bono referral list.

- From October 2001 through September 2002, the Help Line received calls from 109 of Kentucky's 120 counties, slightly more than for the previous year, and calls or internet contacts from 17 counties outside of Kentucky. Our total case volume increased by more than 5% over last year, to an average of 182 cases per month.

MARYLAND - 2002

- Developed and Posted New Elder Website Content for the Peoples Law Library (www.Peoples-Law.org) (PLL) and the MD Justice (www.MDJustice.org) websites, with Assistance of Volunteer Paralegal Students
- Agreement with the Cecil County Area Agency on Aging to Set Up a Senior Outreach Computer Workstation Site Designed to be Available for Seniors
- Agreement with AARP's Legal Hotline Technical Assistance Project to Participate in a Client Satisfaction and Outcomes Survey
- Developed New Brochure on How to Evaluate Legal Website, to Help Maryland Seniors Surfing the Web
- Outreach to Senior Residence Focused on Legal Advice and "Techno-literacy"
- Statewide, Multi-organization Centralized Intake System Modified to Target Elder Callers for Service
- Developed New Multilingual Website Gateway for Non-English Speaking Seniors
- Developed a Plan to Create a Senior Mentoring Program, with Senior Hotline Staff Working in Partnership with the Village Learning Place and MLAN.
- Completed the LAB wide-area network (WAN)
- Finished Plans to Completely Renovate the Hotline Office and Began Construction
- Created a Mediation Resources and Tips Section on the PLL website, and Undertook an Initiative to create an on-line Directory of Dispute Resolution Professionals on the PLL
- Agreements established to set up 10 Senior Outreach Computer Workstation Sites Designed to be Available for Seniors
- Completed Preparation of Client Satisfaction and Outcomes Surveys to be sent to Seniors as Part of an Agreement with AARP's Legal Hotline Technical Assistance Project
- Hotline Office Completely Renovated

MAINE - 2002

- Our executive director of five years left LSE in November 2001 to take a position at the United Way.
- Paul Lavin, former Hotline Attorney and Health Insurance Programs Coordinator, served as Interim Executive Director, and after a national search, was hired permanently in February 2002.
- Amy Kurtz, longtime Hotline Managing Attorney, also left LSE at the end of December 2001.
- Jennifer Minkowitz, former Hotline Attorney and Client Resource Coordinator, was hired as the Hotline Managing Attorney, and began working in that capacity in January 2002.
- As a result of the above staff changes, Health Insurance Programs Coordinator position was vacant for several months, and the Client Resource Coordinator position was eliminated for the remainder of the AoA grant period.
- We have implemented an outcomes-based service delivery and evaluation model. This involves:
 - Documenting client-based measurable outcomes upon case closing;
 - Replacing the traditional priorities-based approach to resource allocation decisions with outcomes-based Client Service Guidelines that consider the impact our services will have in a particular case.
 - Contacting clients to obtain additional information about the impact of our services.
- A law student volunteered to work with the Hotline Managing Attorney to obtain outcomes data from former clients. She assisted the Hotline Managing Attorney in designing a form for collecting and summarizing information in our case management software system. In addition, she also helped the Hotline Managing Attorney to design a client questionnaire and made some follow-up calls to clients.

MICHIGAN - 2002

- The Legal Hotline for Michigan Seniors has enjoyed a rock solid team of attorneys in the past year. Attorneys continue to grow in their knowledge and skill.

**SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2001 – September 30, 2002**

- A trend we have spotted is increased debtor and bankruptcy problems among our callers. We continue to have many clients who would benefit from the Medicaid Waiver (for elderly or disabled), but state funding has limited access to new enrollees.
- A major project accomplished is the revised version of Advancing Smartly; A Legal Handbook for Michigan Women Age 60+. Excerpts can be viewed on our website, under Tool Kits for Advocates, at www.elderslaw.org.

NEW HAMPSHIRE - 2002

- We were not funded for any portion of the year by AOA.

NEW MEXICO - 2002

- The number of Hispanic and Native American callers has increased (doubled for Native Americans). More Spanish-speaking elderly are being served. LREP is doing more outreach to Native Americans.
- Legal supplement materials have been translated into Spanish by two of the staff. Legal workshops are being given in Spanish. New Mexico has a large Spanish-speaking population.

OHIO - 2002

- Pro Seniors now offers free pension counseling for Ohio residents through its statewide legal hotline. The Ohio Pension Rights Project is a collaborative effort between Pro Seniors, Inc. and Elder Law of Michigan, Inc., and is funded primarily by the U.S. Administration on Aging.

WASHINGTON - 2002

CLEAR*Sr closed out Fiscal 2002 by completing several of the tasks promised in its present AoA grant:

- Hotline Services – CLEAR*Sr continued to provide quality legal assistance to over 2300 Washington seniors through its telephone intake advice, brief service and referral services.
- Educational brochures - Several consumer educational brochures were either finalized or identified and disseminated to senior callers or visitors to Northwest Justice Project's website.
- Consumer Legal Needs Checkup - CLEAR*Sr continues to review and track results of its legal needs checkup, which it now distributes to all callers either via mail or telephone interview.
- Advocate Training - In March 2002, with the assistance of the National Consumer Law Center and seven Washington volunteer attorney programs, CLEAR*Sr, sponsored a training entitled, Consumer Law Issues for Senior Clients. This training was offered free of charge to attendees in exchange for their agreement to take a senior consumer case pro bono. The state bar association also videotaped the training and now offers it as part of its video CLE library. CLEAR*Sr has been working with other volunteer programs, so that together they might also offer the training/CLE credits in exchange for pro bono private bar referrals.
- Consumer Issue Spotting Trainings/Outreach - CLEAR*Sr continued to offer consumer issue spotting training to senior advocates throughout the state. Outreach and networking efforts with several senior advocate groups also continued including state, federal and local agencies and presentations to special populations' advocates and county I&A staff.
- Staff Participation/Presentations - All CLEAR*Sr advocates participated in several events focused on improving client service, including a meeting sponsored by the Washington State Insurance Commissioner about senior fraud issues; a meeting with Aging and Long Term Care of Eastern Washington and local legal services programs to discuss services to Eastern Washington seniors; attendance at the annual state bar's Elder Law Section meeting; participation in a coalition to address the problems of predatory lending in the Seattle/King County, and a presentation and table at the Senior Services of Washington annual meeting.
- Temporary Staff Changes - Jim Kerney temporarily left his post as CLEAR*Sr's full-time attorney from March-July 2002 to participate in a mentorship rotation, a program available to CLEAR attorneys to enable them to further develop advocacy skills. In his absence, the assistance of two CLEAR attorneys, Clay Wilson and Margaret van Reuth assured complete coverage of the CLEAR*Sr intake line.

WEST VIRGINIA - 2002

- Partnered with LTC Ombudsman program to share space and produce joint Elder Advocacy newsletter, bringing additional funding to the hotline (\$20,000 per year).

**SENIOR LEGAL HOTLINES
SIGNIFICANT EVENTS
October 1, 2001 – September 30, 2002**

- Completed publication of 45-page handbook on Mental Capacity and Decisionmaking in West Virginia, supported by ABA/Borchard Foundation Partnership in Law and Aging minigrant.
- Partnered in completion of draft of Gaining Freedom, a publication on civil and criminal legal actions stemming from elder abuse and domestic violence in later life.
- Increased number and percentage of clients reached in most rural counties through targeted outreach project.
- Partnered with SHINE program so SHINE counselor in each county is available to help seniors who need extra assistance to benefit from the hotline (hearing impaired, confused, clients with lots of documents, etc.).

WYOMING - 2002

- Center for Social Gerontology staff joined us and Wyoming's Aging Division to work on reporting, funding, etc.
- Sponsored an AARP training on Medicaid and Social Security disability for two days in Casper, Wyoming.