



# A MORE PRODUCTIVE, MORE VERSATILE LEGAL HOTLINE METHODOLOGY

## *A New Concept in Delivery — The Brief Services Unit*

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We have been testing a new method of operating a centralized telephone intake and delivery system, also known as a legal hotline, legal advice line or legal help line. In this article I will use the terms legal advice line or advice line. We have been testing a method developed by a fee-for-service legal advice line, Tele-Lawyer, Inc., and have achieved impressive results. The new method increases productivity by 290% and cuts costs by almost one half. However, it requires most programs to divide their advice lines into two separate units: a legal advice unit and a brief services unit. This new brief services unit when combined with a program's private attorney involvement program has the potential to significantly improve the efficiency and productivity of a legal services program in much the same way as the original legal advice line concept did. The new methodology also may allow states to develop statewide or regional advice lines without sacrificing local program control and without displacing the local program's legal advice line.

Before discussing the new methodology and the proposed new brief services unit, a review of current advice line practices is required.

### **Current Advice Line Practices**

At AARP, we operate two legal advice lines which are typical of the two types operated by most legal services and Senior Legal Hotline programs. The AARP Pennsylvania Legal Advice Line for Older Americans (hereinafter called PA advice line) was the first of its kind and began operations in 1985. It primarily provided legal information, legal advice and referrals. Few brief services were provided. The PA advice line was answered by intake workers who screened the callers for eligibility and forwarded eligible callers to advice line lawyers if they were available. The lawyers conducted the conflict check, determined whether the caller had to pay for the call, and collected any fees by credit card or check.<sup>1</sup> (Those with less than \$15,000 in

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annual income received free services; others paid a \$15 flat fee per call). Otherwise the intake workers took the callers' names and telephone numbers for call backs by the legal advice lawyers. Most calls were handled on a call-back basis. A common variation of this model is to place the caller on hold until an attorney is available; in this variation the caller usually has the option of asking for a call back instead. In 1998, the PA advice line served 5,111 clients with 5,651 cases using 3,826 hours of paid attorney time (attorneys were part time employees). This resulted in an average of 45 minutes of attorney time for each client served. Or, stated another way, a full-time equivalent attorney served 2,146 clients each year (46<sup>2</sup> weeks @ 35 hours per week). However, not all of this time was spent talking with clients. Some time was spent on : (1) making call-backs to clients who weren't home; (2) entering case notes into the computer; and (3) conducting conflict checks, screening for and collecting fees, and performing other administrative tasks. We never measured the portion of the 45 minutes that was actually spent on the phone with clients. If the average beginning salaries for attorneys are \$25,600 and the median salaries are \$38,300<sup>3</sup> with an average of 20% in fringe benefits, then attorney costs range from \$14.32 to \$21.42 per client served.

We also operate a legal advice line as the intake mechanism for our full-service legal services program for low-income seniors in DC called Legal Counsel for the Elderly (LCE). Incoming client calls to LCE are answered by an intake worker who performs a conflict check, screens for eligibility and refers ineligible callers to other resources. Eligible clients are served on a call-back basis by part-time attorney employees who provide legal information, legal advice, referrals, and brief services. These break down as follows: Information/advice — 42%; referrals — 24%; brief services — 22%; other — 12%. In 1998, 2,770 clients with 3,533 cases were served using 2,808 hours of paid attorney time and 300 hours of volunteer attorney time. This results in an average of 61 minutes of paid attorney time for each client served or 1,584 clients served per full-time equivalent paid attorney. Using the salary range described above, the attorney costs range from \$19.39 to \$29.02 for each client served. This higher cost is due to the additional time required to provide brief services such as writing a letter or making a phone call to resolve a problem.

### New Legal Advice Methodology

In June, 1999, we began testing the new methodology. We closed the PA legal advice line office in Pittsburgh and entered into a contract with Tele-Lawyer, Inc. to operate the advice line using the methodology that they had developed over the years for their fee-for-service legal advice line. We use the same 800 telephone number but forward the calls to Nevada where Tele-Lawyer intake workers answer the calls, conduct conflict checks, and screen the callers using our eligibility criteria. We kept our old 800 number because it was well established in the Pennsylvania senior community. Once the caller is screened for conflicts and is found eligible for services, the intake worker forwards the call back to Pittsburgh where a legal advice lawyer handles the call, working from home. After the call is completed, the lawyer finishes the case notes and is ready to handle the next call. A significant change in methodology concerns how the lawyer is paid. He or she is only paid for the time he spent on the phone with the client plus three additional minutes for completing case notes. Another change is that we lease the telephone system instead of purchasing it. We thereby avoid the expense of hiring a consultant to help us select a system and owning a system that is likely to be obsolete in a few years. Also we are able to obtain 800 service at a lower rate (about 6 – 8¢ per minute). The last significant change is that no administrative tasks

are performed by the lawyer. Eligibility screening, conflict checking, call routing, call-backs, collection of fees, and collection and entry of client eligibility and demographic information into the database are performed by the intake workers.

The change in attorney costs is dramatic although we use the same lawyer as we did before the change. Formerly we used six part-time lawyers, each working an average of 13 hours per week to serve 102 clients. Now we use just one of these lawyers for an average of about 19 hours per week to serve an average of 74 clients. (Our call volume has decreased because we haven't been publicizing the service.) This increase in productivity results from a reduction in the time the attorney spends on administrative tasks and the fact that there is no paid down time. He spends an average of only 12.52 minutes on the phone with the client without any change in quality (i.e., the same attorney is serving the same clients). The attorney is paid as an independent contractor at about twice the rate as before (80¢ per minute or \$87,360 per year). Thus the attorney costs, including three extra minutes for case notes are \$12.42 per client served or about 1 $\frac{3}{4}$  times less than an attorney of comparable experience (27 years) under the former system. The cost is even less when one considers the reduction in overhead (e.g. rent, office supplies). Under this new system a full-time equivalent paid attorney can handle 7036 cases per year.

The new system operates primarily on a call-back basis. If an attorney is available, the intake worker screens the caller for eligibility, conducts a conflict check, and forwards the eligible caller to the attorney after entering the caller's demographic and eligibility information into the case management data base. (Tele-Lawyer uses a customized software based on Microsoft SQL server.) If, as is more likely, the attorney is not available, the intake worker records the caller's name and telephone number for a call-back. When the attorney is available (he calls the intake worker when he is ready to take a case), the intake worker calls the client back, conducts a conflict check, enters the demographic and eligibility information into the data base and forwards the caller to the attorney. The attorney makes written case notes and dictates the notes to the intake worker after the call is completed. The intake worker enters the notes into the computer as they are being dictated. In October 2000, the attorney will begin entering the case notes directly into the case management system which will be accessible over the Internet. Once a week the attorney reviews and edits

all his case notes; the changes are entered into the database by the intake workers.

Even though the clients are served on a call-back basis, the goal is to call back within an hour or two of the client's original call. If the client is not reached the same day, one attempt is made the next day. If this is not successful, the call-backs are abandoned; however, the abandonment rate is fairly low (7 – 12%). Of course these abandoned callers are free to call back. It is the intake worker's opinion that if a caller is not reached the same day or early the next day, call-backs are unproductive.

The cost savings achieved by the new methodology primarily results from minimizing the down time of lawyers.

To make this methodology work, emphasis must be placed on quality control. Every case note must be reviewed by another experienced attorney who contacts the advice line attorney about any cases requiring corrective action. The advice line attorney is not paid for corrective action. However, the reviewing attorney checks the subsequent case notes to insure the corrective action was taken. The legal advice line attorneys also should be paid for periodic meetings with the reviewing attorney to go over new developments in the law and discuss cases that have necessitated corrective action. (This time was not included in the cost per call calculations above.) The advice line attorneys are sent periodic updates in the law (available from the AARP Legal Hotline Technical Assistance Project at [www.equaljustice.org/hotline1](http://www.equaljustice.org/hotline1)) and given legal resource materials and community resource information which is updated regularly. (Some of this information also is available from the AARP Legal Hotline Technical Assistance Project at [www.povertylaw.org](http://www.povertylaw.org) or by calling (312) 263-3830.)

The cost savings achieved by the new methodology primarily results from minimizing the down time of the lawyers. Call-backs are made by the intake workers and not the lawyers. Entry of demographic and eligibility information into the database and conflict checking is also done by the intake workers. The system encourages the lawyers to record most of their case notes while talking to the client instead of waiting until after the call. Although the case notes are shorter, they must still be detailed enough to allow meaningful

review by the quality control attorney. Finally the attorney can arrange for materials to be sent to the client by entering a code into the database which tells the intake workers what materials to send. There is an increase in the time spent by intake workers. On average the intake worker spends six minutes per call including call-backs, screening, conflict checks, entering client information into the data base, collecting fees and entering case notes.

Another advantage of the new methodology is that there is no back-log of unreturned calls and no long client hold times. If the attorney is busy, the caller's name and telephone number are recorded by the intake worker for a call-back. This eliminates the long holding problems. Most call-backs are made within an hour of the initial call so that the clients are usually reached. As mentioned above, the percentage of call-backs where the client can not be reached is relatively low (7–12%). Since the attorneys are not paid for down time, the advice line can arrange to have back-up attorneys available to help with peak call periods without increasing the cost per call or overall cost. In fact the cost per call is less than with the prior methodology, in part, because fewer call-back attempts are needed to reach the clients.

**Table I** summarizes a comparison between the system previously used in Pennsylvania (column 1), the system currently used by LCE in DC (column 2), and the new methodology now used in Pennsylvania via Nevada (column 3). **Diagram I** compares the new methodology with the system previously used in Pennsylvania. Notice that many of the functions previously performed by the attorney have been shifted to the intake worker. In particular, the attorney never calls the client. All calls initiated by the advice line are made by the intake worker and then forwarded to the attorney. The managing attorney's job has not changed.

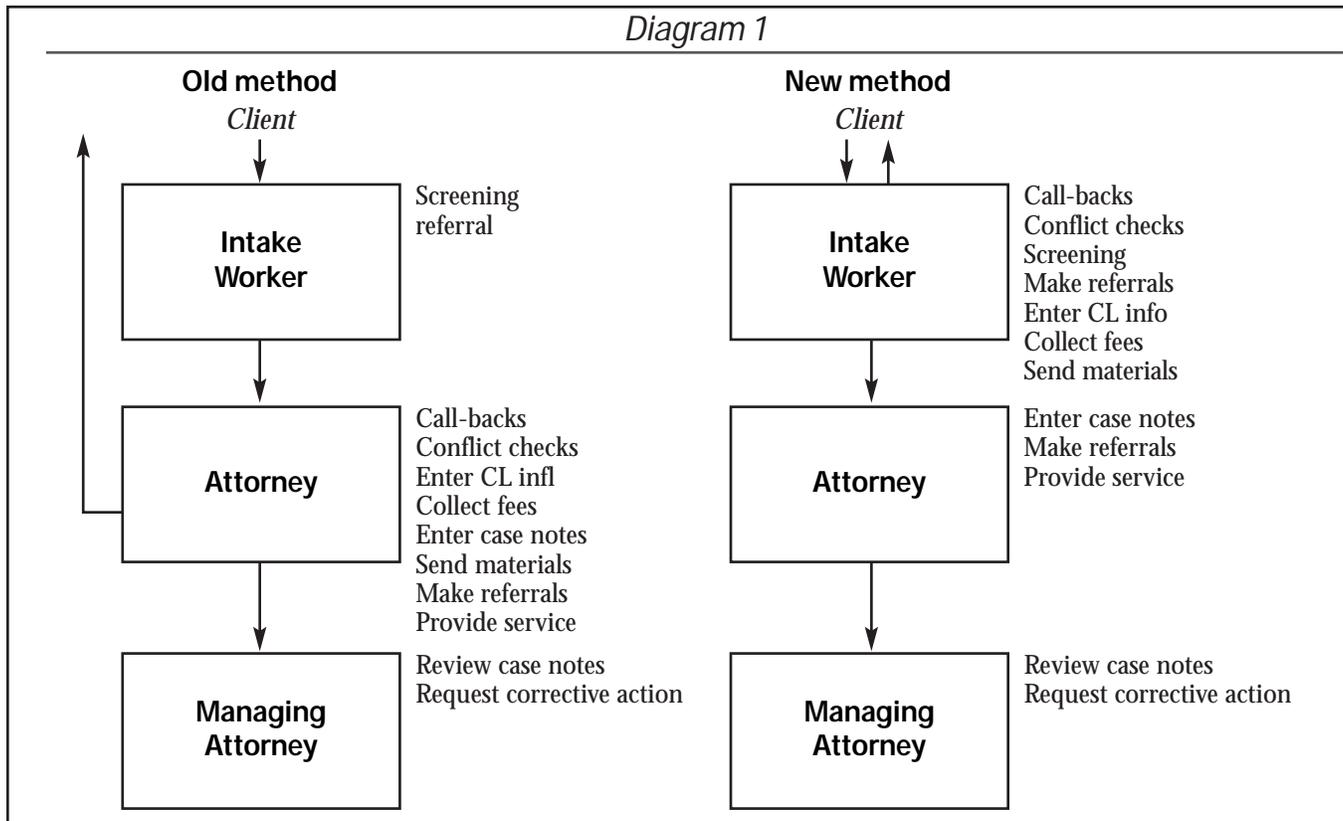
### Testing Income Generation

We are also testing the use of the legal advice line to generate income by providing the same services on a fee basis to over-income clients. The services are provided in the same manner except that before the caller is referred to the attorney, she or he must provide a credit card number for billing purposes or call a 900 telephone number maintained by the legal advice line so that the cost of the call is billed to the caller's phone bill. The use of the 900 number is more expensive to provide than the 800 number/credit card service. On average the cost of a 900 call is \$0.50 per minute more.

Table 1

	Old PA	DC	New PA
<i>Services</i>	Legal Advice, Info, Referrals Brief Services	Legal Advice, Info, Referrals	Legal Advice, Info, Referrals
<i>Attorneys</i>	Staff	Staff	Contractors
<i>Method of Payment</i>	Salary	Salary	70–80¢ per minute for time on phone plus 3 minutes for note taking
<i>Attorney Time per Client Served</i>	45 minutes	61 minutes	15.5 minutes
<i>Attorney Cost per Client Served</i>	\$14.32–\$21.42	\$19.39–\$29.02	\$10.86–\$12.42
<i>Other</i>			Lease phone
<i>Cases Handled by FTE Attorney</i>	2146	1584	7036

Diagram 1



However, many callers either don't have a credit card or are reluctant to share it with the advice line. Currently 40 – 65% of the callers use a credit card with the remainder using the 900 option. Currently callers pay \$3 per minute for the service with an average total

cost of \$21 per call (i.e., pay calls only average 7 minutes in length).

Generating income in this manner is a challenge. Certain approaches don't work well. For example, over income callers are reluctant to pay for the service. Only

about 25% of our over-income callers agree to pay for the service. This may result from a feeling that they are being exposed to a bait-and-switch scheme. The caller is expecting to receive a free service but is offered a fee service because she or he is ineligible for the free service. Thus the fee-based services need to be separately marketed and not tied to the free service.

Most forms of advertising do not work well for legal advice services. For example TV, radio, and print advertising do not yield enough business to pay for the marketing. The best form of marketing appears to be through entities who can refer clients to the advice line. This includes other legal services groups; bar associations; information and referral services; community service agencies; local, county, state and federal legislators; and the blue pages (free listings for non-profits).

To date we have had limited success. We average one pay call per day or one pay call for every 11–15 free calls. However, we have just launched a new marketing campaign and hope to increase the number of pay calls.

### Other Benefits of the New Methodology

This new method of operating the legal advice line has great potential which remains to be tested. The system can be easily supplemented through the use of volunteers. Volunteer attorneys can work out of their offices and plug into the advice line whenever they want. All they have to do is call the advice line when they are available, indicate their areas of expertise and wait for the next appropriate call. They can unplug from the advice line by simply notifying the intake workers. Case notes can be dictated to the intake workers, hand written using a form and faxed for entry by the intake workers, or preferably E-mailed to the intake workers for entry into the case management system. These notes must be reviewed in the same manner except corrective action may have to be taken by a paid advice line attorney.

This methodology can be automated through currently available phone systems. Some phone systems can be programmed to route calls according to subject area. Similarly, paid or volunteer attorneys can log onto the telephone system to receive calls only in designated subject areas by answering recorded questions using the phone's touch tone pad. The intake worker can simply forward a call according to its subject area and the telephone system will connect the caller to the next available attorney designated to receive calls on that topic area. The phone system can record the

length of the call which can be used as the basis for monthly payment. This would eliminate the need for the attorneys to call the intake workers to notify them of their availability. Attorneys would simply log off the phone system when they wanted to stop handling calls and log back on when they wanted to resume services. Intake workers could record caller information for a call-back if no one was logged on to accept calls in the subject area. When someone logged on, the intake worker would call the client back and forward the call.

This system offers maximum flexibility. The advice line could use any licensed attorney in the state. Furthermore, if the attorney was on travel in another state, the calls could be forwarded to him or her anywhere in the U.S. (or even abroad). Thus, an advice line could contract with a former legal services lawyer anywhere in the state and would not be limited to local attorneys except for those areas of law requiring knowledge of the local laws or court systems.

### Using New Methodology to Operate Statewide or Regional Advice Lines with Local Legal Services Programs

A statewide or regional advice line could use this new methodology with any attorney in any local legal services program in the state. This would overcome the criticism that statewide and regional advice lines can not provide meaningful advice on issues requiring a local knowledge of the law or court system. These calls would be referred only to attorneys with the requisite local expertise. All other calls could be handled by any available attorney in the state with the appropriate knowledge.

Thus, a statewide or regional hotline could be comprised only of intake workers and senior attorneys responsible for quality control. All the calls would be handled by staff of participating local legal services programs. Each local program would be responsible for scheduling staff with the necessary expertise according to an approved statewide staffing schedule. Some of these staff would receive calls during their assigned time periods with breaks as needed. Other staff would be on call. If the call volume so required, these on-call staff would begin receiving calls. All these staff could do other work while waiting for calls. Over time, the scheduling could be perfected.

If desired, local programs could be paid for the staff time they provided. In fact, this would encourage participation. The statewide or regional advice line would have a budget for making these payments and the telephone system would provide the information

Table 2

	Monday (AM)			Friday (PM)				
	9-10	10-11	11-12	12-1	1-2	2-3	3-4	4-5
<i>Family law</i>	a	a	a	c	c	d	d	e
<i>Family law</i>	c	d	d	e	e	f	f	-
<i>Family law</i>	e	f	f	-	-	-	-	-
<i>Housing</i>	a	a	a	b	b	c	c	c
<i>Housing</i>	f	f	f	d	d	e	e	e
:	:	:	:	:	:	:	:	:
<i>Public Benefit</i>	b	d	c	e	e	f	a	b

necessary to calculate the amount owed to each local program.

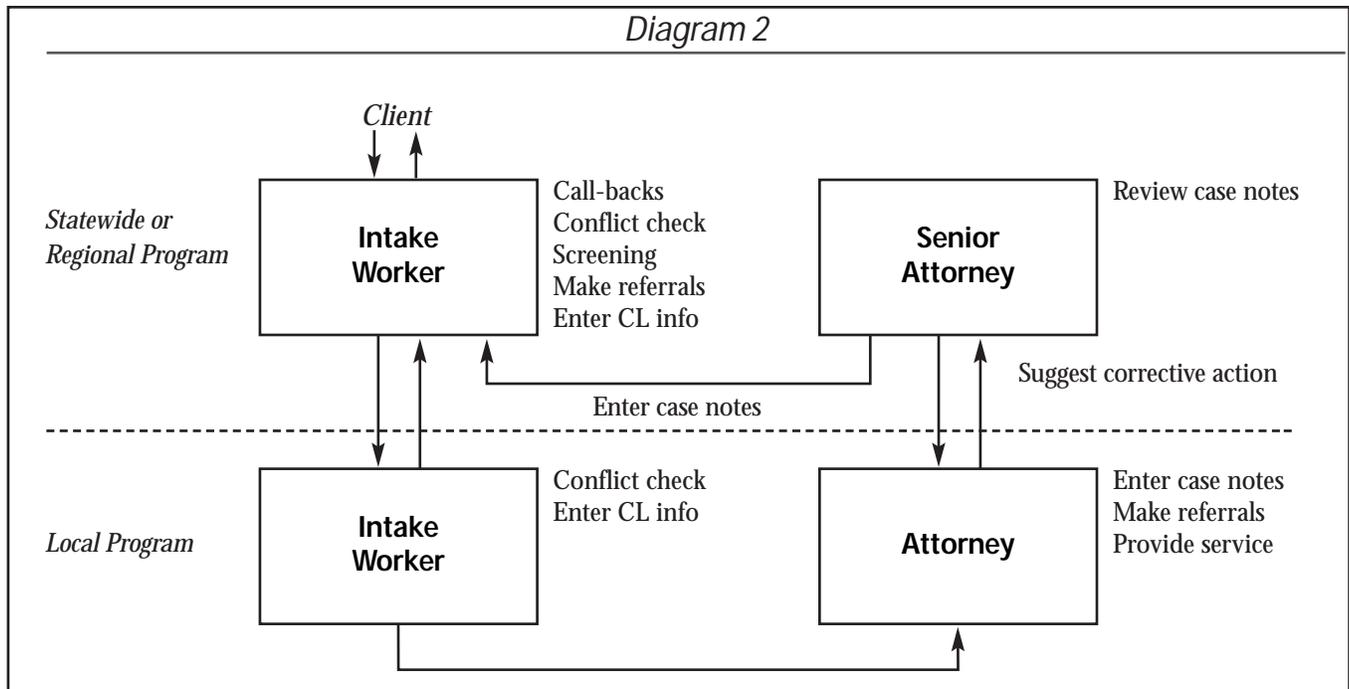
For example, suppose there were six local legal services programs in a state (e.g., programs a, b, c, d, e, and f). A grid would be created based on the pattern of legal services provided during the past year (i.e., 40% family law, 20% housing, etc.). The local programs would divide responsibility for providing staff with the appropriate expertise to cover all the time slots set out in the grid.

The grid (see table 2) is provided as an example. In this example three attorneys are available on Mondays from 9:00 am to noon to handle family law cases and two are available to handle housing cases. Not shown on the grid are all the other subject areas and the corresponding number of attorneys available during the Monday morning shift concluding with public benefits law. Similarly, but not shown, there would be schedules for Monday afternoon through Friday morning. The Friday afternoon schedule is shown to demonstrate that the number of attorneys available would vary since more calls are usually received on Monday mornings than on Friday afternoons. Note that the designation of "a" thru "f" indicates the location of the corresponding attorney. Thus, local legal services program "a" provides two attorneys during the entire Monday morning shift, one to handle family law and one to handle housing law cases; program "a" can use two attorneys for this or several who take turns. Program "c" provides one attorney on Monday mornings for family law from 9 am to 10 am and one for public benefit law from 11am to noon. Attorneys from program "d" take over for the rest of one morning shift in family law and for one hour for public benefit law.

Local programs could meet and complete this grid every 3 months. Programs with special expertise could staff most of the slots for their specialty area. There would be one grid for those staff responsible for handling the calls and one grid for those "on-call." If circumstance required, last minute changes could be arranged among the programs. Thus, if one program had several staff out sick they could find another program willing to handle their slots. This would be another reason for paying programs for their time as the funds would go to the program that actually provided the services.

This methodology would allow local programs to continue to operate their own legal advice lines. Advice line staff would simply have double duty; they would answer calls for both advice lines. During their scheduled hours on the statewide advice line, they would receive calls from the statewide program; otherwise they would handle local calls.

The system could work something like this. When the intake worker at the statewide advice line received a call, she or he would screen the client for eligibility and conduct a conflict check. The participating local programs would have to agree on these eligibility criteria since they would have to provide at least legal advice to anyone who met the criteria. If there was a conflict, the intake worker would refer the caller to his or her local legal services program unless the local program gave the service that yielded the conflict. The intake worker would forward an eligible caller to the program scheduled to receive calls in the client's issue area. The intake worker in the local program would receive the call and conduct a second conflict check against the local program's client database. If there was a conflict, the caller would be returned to the statewide



program for a transfer to a second legal services program. To plan for this conflict problem, attorneys from different programs should be scheduled for most time slots in the grid particularly for issues subject to many conflicts (e.g., family law). Alternatively the statewide intake worker could tell the caller that she or he will be called back as soon as an attorney with the requisite expertise is available from another program.

After the local legal services attorney completed the call, he or she would finish the case notes in the local program's case management system. The notes would then be printed at the end of the day and faxed, mailed or E-mailed to the statewide program where the intake workers would enter them into the statewide program's case management system. If the statewide and local programs had the same case management system, the case notes could be transferred electronically between the programs eliminating the need to have them keyed into the statewide system. The case notes would be reviewed by the senior attorney in the statewide program and the local attorney would be notified if corrective action were required. Notes related to the corrective action would also be forwarded to the statewide program. The case notes could also be reviewed by the local program's management.

Another benefit of this methodology is the local program would receive credit for the services and would include these cases in its case services reports. A diagram of this methodology is shown in [diagram 2](#).

#### A New Concept: The Brief Services Unit

The new methodology's limitation is that it is not well suited to handling brief services or advice cases that are based on numerous documents that cannot be read over the phone or sent by fax.<sup>4</sup> However, it occurred to me that this limitation might be an opportunity, namely the creation of a separate brief services unit (BSU). The idea of a BSU also seemed to solve other inefficiencies that I have observed in my own program (i.e., LCE) and in others. One inefficiency is that advice, brief services, referrals, and no merit cases comprise 32% of the caseloads of our staff attorneys and paralegals, notwithstanding the fact that our advice line handles many brief services. Part of this is attributable to the types of problems experienced by seniors; but most arise from the fact that these cases require further development before an appropriate resolution is apparent. This development is too time consuming or protracted for the advice line to undertake so these cases are referred to staff. But this case development and investigation could be done by a BSU which then could resolve those cases requiring only advice, brief services or a referral. Only cases requiring extended services would be forwarded to staff attorneys and paralegals.

Another inefficiency results from the misuse or under use as much as volunteer lawyer projects (VLPs). In an earlier<sup>5</sup> article, I estimated that VLP cases cost about 55% of those handled by paid staff even though the legal work is provided for free. This is

due to the time required to recruit the attorneys and to develop, place, and monitor the cases. 30% of cases closed by our VLP program are closed by means of abbreviated services. Given the cost of development, placement, and quality control, these cases cost more to process through the VLP than if they were handled by a legal advice line or BSU with paid staff. Most VLPs are underutilized because their case mix rarely matches the case handling capacities of the volunteer lawyers. Typically some volunteer lawyers are over-worked (e.g., family law lawyers), but many are under-utilized (e.g., wills, consumer, personal injury defense, legal transactions). This is a result of how cases are routed to the VLP. Since it is difficult (and unwise) to refer undeveloped cases, most cases need to be fully developed so that one can determine the expertise and amount of time required to handle the case. Nothing discourages volunteer lawyers like cases with unexpected surprises. My program and many others rely on staff attorneys and paralegals to develop all but the most straight-forward cases. However, once staff have developed the case, they often find it easier to resolve it themselves than refer it. As a result they tend to send the VLP those cases they don't want to handle which, not surprisingly, tend to be the ones that volunteer lawyers don't want to handle either. Thus, there is a need for a separate unit (i.e., a BSU) to develop these cases and send the most referable ones to the VLP and the others to the staff. There is also a need for this separate unit to conduct "active intake" to identify clients with problems that can be referred to underutilized volunteer lawyers. Several articles including those of LCE staff have been written on how to proactively obtain these cases.<sup>6</sup>

Also we have discovered over many years of testing that non-attorney volunteers are well-suited to case development and investigation. They can take the time to call SSA until they get the information that is needed. They can write for documents and records; they can take pictures of deplorable housing conditions and review housing records and licenses. Thus, I propose that the BSU be staffed with non-attorney volunteers, a few experienced, paid paralegals and a paid supervising attorney. The unit could resolve over 50% of the cases now handled by expensive paralegal and attorney staff. I recently reviewed all of the cases closed last year by two of our staff attorneys. One did more court work; the other did more administrative agency work. The attorney doing administrative work closed 140 cases of which 26% involved extended services. I estimated that a BSU could have closed 116 of these

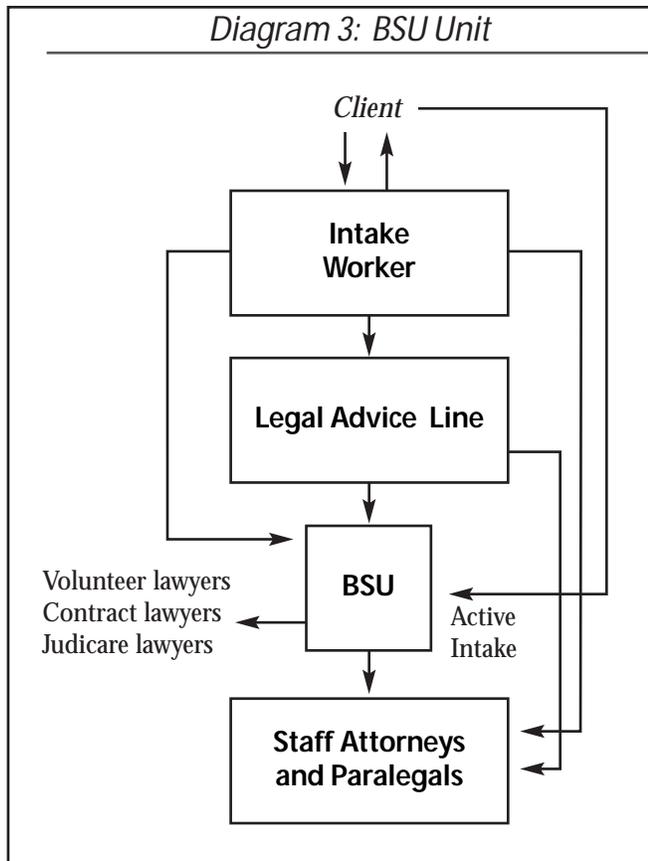
including 23 that involved extended services. Much of the work could have been done by a non-attorney volunteer and a paralegal with an attorney monitoring to determine how the case should be resolved. The extended services cases that seemed to be resolvable by the BSU involved simple negotiations with utility companies and other providers of goods and services.

The attorney doing court work closed 72 cases of which 28 involved extended services. I estimated that a BSU could have resolved 50 of these including 15 extended services cases.

Thus, I propose that a BSU be tested in some legal services programs. All cases except some emergencies, those cases clearly requiring extended services (e.g., client has a court or hearing date), and those requiring a complex legal document (e.g., will) would be referred to the legal advice line. Some emergencies and cases clearly needing extended services or the drafting of complex documents would be directly scheduled for staff advocates or the VLP as appropriate. The advice line would refer all the cases it could not resolve to the BSU except those cases clearly requiring extended services or faced with a statute of limitations problem. The BSU would house the VLP and conduct active intake. The BSU would resolve all the cases it could and refer the rest to the VLP or to in-house staff. Priority would be given to the VLP to insure it is fully utilized. Only those not suitable for the VLP would be sent to in-house staff.

My sense is that the BSU could have the same impact on the delivery of legal services as the advice line has. It promotes the philosophy that staff attorney and paralegal resources should be used primarily for extended services and systemic change.

I envision that the BSU would operate something like this. Its cases would come from the advice line. The advice line attorneys could suggest in the case notes the steps that should be taken by the BSU. The managing attorney of the BSU would review each case and add any steps required to develop and investigate the case that the advice line attorneys may have overlooked. The manager would then assign each case to either a non-attorney volunteer or a paid paralegal, as appropriate, for case development and investigation. We have found that retired people are an excellent source of these non-attorney volunteers. The staff paralegals and volunteers would carry out the identified steps and consult the managing attorney as needed. Once all the steps were completed, the managing attorney would determine the proper disposition of the matter. If only advice was needed the managing



attorney or the paralegals and volunteers under the direction of the managing attorney would provide the advice to the client and close the case. Similarly other brief services would be performed by the managing attorney, the paralegals or the non-attorney volunteers as appropriate. When the BSU closed a case it could be tickled for follow-up to insure that the client followed the advice or was otherwise able to resolve the matter. The follow-up would be performed by the non-attorney volunteers. If the follow-up indicated that the client needed more services, the BSU would reopen the case and refer the client to the appropriate part of the legal services program.

Similarly any other case in the BSU that needed extended services would be referred to either the VLP (or a contract or judicare lawyer) or to an in-house attorney or paralegal. Priority would be given to referrals to the VLP.

The BSU also would conduct active intake. This would include periodic clinics held in low income neighborhoods. Publicity for these clinics would state that the clinics only handled cases in certain areas of the law (e.g., in which volunteer lawyers (or some other underutilized program resource) were available to handle the cases). Clients with other problems

would be referred to the program's intake unit or legal advice unit. Other forms of active intake could be used such as inserts in adverse decision letters from government agencies and posters in government offices or in certain branches of the courts. These active intake activities would be carried out by the paralegals and volunteers (see diagram 3).

The BSU paralegals and volunteers could also draft legal documents using document generation software. This would include powers of attorney, simple wills, deed transfers, etc. We have also been experimenting with a special methodology for resolving consumer complaints. We have developed templates for most of the common consumer problems (security deposits; defective goods and services, neighborhood complaints). We also have a database of names and addresses of people at major corporations and businesses whose job is to handle complaints arising from the businesses' goods and services. We have a database of government agencies that regulate these businesses to which copies of the complaint letters are sent. We have found a customized form letter sent to the right person at a business with copies sent to the corresponding regulatory agencies gets action. (I will be writing a separate article about our experience with this project soon). These letters can be drafted by paralegals or volunteers following our step by step procedures.

## Conclusion

Together, the streamlined legal advice line and BSU should maximize the efficiency with which programs resolve all but extended services cases. This should allow programs to better focus their resources on extended service cases and systemic advocacy which are the legacy of legal services programs nationwide.

- 1 In the case of paying by check, the caller received the service and mailed the check afterwards.
- 2 This allows 2 weeks for holidays, 2 weeks for sick leave and 2 weeks for vacation.
- 3 These averages are based on LSC data as compiled by Ken Smith.
- 4 Some programs have recruited a network of social service agencies willing to fax documents for clients.
- 5 Wayne Moore, *Improving The Delivery of Legal Services for the Elderly: A Comprehensive Approach*, 41 *Emory Law Journal* 805, 842 (Summer 1992).
- 6 Sheryl Miller, *Targeted Intake: A Community Based Approach to Increase the Availability of Cases for Pro Bono Panel Attorneys*, *MIE* Vol. 13, #3 (Fall 1999) 46-49.