

## PROPOSAL FOR SENIOR HELPLINE

The Federal Administration on Aging (AOA) funds Senior Legal Helplines in a number of states to enhance access to legal services for clients aged 60 and older (“Seniors”). Florida has not had a Senior Legal Helpline since 2001, even though Florida has the highest percentage of Seniors of any state. A Senior Helpline could improve both the quantity and quality of legal services provided to Seniors statewide.

Bay Area Legal Services, Inc. (“BALS”), which is headquartered in Tampa, proposes to submit a grant application to the AOA for funding to operate a Florida Senior Helpline. BALS currently operates a regional legal services hotline that screened more than 52,000 calls in 2004. Since 1977, BALS has continuously maintained a team of legal advocates dedicated to serving the elderly and funded by the Older Americans Act.

BALS proposes to develop and manage a statewide Senior Helpline to increase access to legal advice and referrals for under-served Florida Seniors. BALS would provide these services in partnership with existing Title III-B programs within Florida, serving as a convenient point of entry for Seniors who apply for legal assistance. Once the clients have received an assessment of and advice about their legal problems from trained legal advocates, the Senior Helpline will refer them to appropriate providers in their communities, based upon a referral matrix developed by the statewide partnership. Our referral matrix will be a reference guide for Helpline advocates, outlining typical civil legal issues followed by a listing of the Title III-B program in each county or region that has agreed to provide further services to Senior clients with those specific legal problems. The Senior Helpline will not take the place of programs that are sufficiently staffed to provide high quality legal services within their counties. Callers from these areas will be referred back to their local providers by trained screeners.

### How Services will be Provided

BALS will promote a toll-free Helpline number for Seniors to call to access services. While services will be available statewide, the Helpline number will be initially publicized in counties that currently have the fewest legal resources for their Senior residents. As the Helpline’s staffing capacity increases, additional counties will be added until the number can be publicized statewide.

Callers to the Helpline will be placed in a voicemail queue. BALS will staff a separate screening unit with employees who are bilingual in Spanish and English. The screeners will answer the calls in the order in which they are received. They will determine where each caller resides and consult the referral matrix to determine whether the caller should be directly referred to a local provider or scheduled for a callback appointment with a Helpline attorney or paralegal. Factors for referring callers rather than scheduling them will include resources available to Seniors in the region in which they live and the types of problems they are calling about. Priority will be given to Seniors calling for advice on AOA priority legal issues; those seeking advice on non-priority issues such as criminal and traffic matters, or establishing a trust or preparing a will, will be referred to state or local attorney referral programs. The screeners will complete a conflict check and an

application in BALS' case management system for each qualifying applicant, which will include basic demographic information as well as a description of the applicant's legal issue. Applicants who present conflicts will be referred to their county's local program or Lawyer Referral Service for assistance.

Scheduled applicants will be given a date and time at which they may expect a telephone call from a legal advocate (attorney or paralegal working under attorney supervision) to discuss their legal problem. The number of FTE advocates available will depend upon funding; at least one advocate will be bilingual in English and Spanish. The advocate will call the applicant, determine the relevant legal issues, provide appropriate advice, and prepare a summary of the interview in the case management system. If the case can be resolved with advice or brief service, the client will receive a short letter confirming that services have been concluded. If the client needs further legal services and the statewide partnership can provide assistance, the file will be printed and faxed to the provider identified in the matrix. If the partnership lacks resources for extended representation, the client will be referred to the appropriate lawyer referral service.

#### Technology Requirements

BALS will need to set up a separate copy of its web-based case management system specifically for the Senior Helpline. This will ensure confidentiality for existing and future clients served through BALS' Legal Aid Line and extended service teams, as well as for clients of the Statewide Senior Helpline. Senior Helpline advocates will be able to login to the case management system from any internet-linked computer at any location. BALS will also need to pay for a separate toll-free number dedicated to the Senior Helpline, with multiple lines to facilitate call flow into the queue.

#### Building Capacity through Partnership

BALS will seek to serve a minimum of 2600 seniors annually through the Senior Helpline. Call volume will be kept at a manageable capacity through screening and through setting of the Helpline's open hours.

We hope to expand capacity by partnering with law schools, private law firms and with advocates from current Title III-B programs that donate staff time to provide intake for the Senior Helpline, using BALS' case management system. The advocates will use legal outlines to be developed and updated by law students in clinical programs, and by private attorneys fulfilling *pro bono* commitments for their law firms.