LEGAL SERVICES CORPORATION BOARD OF DIRECTORS

MEETING OF THE DELIVERY OF LEGAL SERVICES COMMITTEE

OPEN SESSION

Thursday, January 28, 2016

2:50 p.m.

The Mills House Wyndham Grand Hotel 115 Meeting Street Charleston, South Carolina 29401

COMMITTEE MEMBERS PRESENT:

Father Pius Pietrzyk, O.P., Co-Chair Gloria Valencia-Weber, Co-Chair Victor B. Maddox Julie A. Reiskin John G. Levi, ex officio

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STAFF AND PUBLIC PRESENT (Continued):

- Allan J. Tanenbaum, Non-Director Member, Finance Committee
- Joan Kleinberg, Manager of CLEAR (Coordinated Legal Education, Advice and Referral), Northwest Justice Project

Frank Tenuta, Managing Attorney, Iowa Legal Aid

Beverly Allen, Managing Attorney, Land of Lincoln Legal Assistance Foundation

- Adrienne Worthy, Executive Director, Legal Aid of West Virginia
- Andrea Loney, Executive Director, South Carolina Legal Services

Leslie Fisk, South Carolina Legal Services Adam Protheroe, South Carolina Legal Services Gerald Jones, South Carolina Legal Services Matthew Billingsley, South Carolina Legal Services Rusty Infinger, South Carolina Legal Services Rita Roache, South Carolina Legal Services Stephanie van der Horst, South Carolina Legal Services

Juanita F. Middleton, South Carolina Legal Services Jamie L. Bell, South Carolina Legal Services Angela Myers, South Carolina Legal Services Kimaka Nichols Graham, South Carolina Legal Services Mark Fessler, South Carolina Legal Services Kirby Mitchell, South Carolina Legal Services

Don Saunders, National Legal Aid and Defenders Association (NLADA)

Robin C. Murphy, National Legal Aid and Defender Association (NLADA)

CONTENTS

OPEN	SESSION	PAGE
Appro	oval of agenda	
2.	Approval of minutes of the Committee's Open Session meeting on October 5, 2015	6
3.	Discussion of Committee's evaluations for 2015 and the Committee's goals for 2016	Tabled
4.	Review of LSC management proposal to review and revise Performance Criteria	Tabled
	* Lynn Jennings, Vice President for Grants Management	
5.	Panel presentation and Committee discussion on best practices for effective intake	б
	 * Joan Kleinberg, Manager of CLEAR (Coordinated Legal Education, Advice and Referral), Northwest Justice Project * Frank Tenuta, Managing Attorney, Iowa Legal Aid * Beverly Allen, Managing Attorney, Land of Lincoln Legal Assistance Foundation * Adrienne Worthy, Executive Director, Legal Aid of West Virginia * Ronké K. Hughes, Program Counsel, Office of Program Performance, LSC 	
6.	Public comment	Tabled
7.	Consider and act on other business	Tabled
8.	Consider and act on motion to adjourn meeting	Tabled

Motions: Pages 5, 6, 55

1	PROCEEDINGS
2	(2:50 p.m.)
3	CO-CHAIR FATHER PIUS: According to the duly
4	noticed announcement for the Delivery of Legal Services
5	Committee, I now call this committee meeting to order.
б	So we have a quorum. And the first thing on
7	the agenda is the approval of the agenda. We're going
8	to make a change before we even do that. We're making
9	a change. Because a previous committee ran very late,
10	we are going to move this around.
11	We're going to move the panel presentation
12	first, and then we will do the other items. If we
13	don't have time, we're going to table the other items
14	till tomorrow after lunch. And we're also adding one
15	item to that, and that is just a brief review of the
16	PQV pilot project to involve clients. It's really just
17	an announcement, but we'll add that to the agenda as
18	well.
19	So as I've discussed, as amended
20	MOTION
21	MS. REISKIN: So moved.
22	CO-CHAIR FATHER PIUS: So moved. Is there a

1 second?

2 CO-CHAIR VALENCIA-WEBER: Second. CO-CHAIR FATHER PIUS: All in favor? 3 4 (A chorus of ayes.) CO-CHAIR FATHER PIUS: Okay. The next thing 5 6 is the approval of the minutes from October 5th. Do I 7 have a motion? 8 ΜΟΤΙΟΝ 9 MS. REISKIN: So moved. 10 CO-CHAIR FATHER PIUS: Are there any seconds? 11 MR. MADDOX: Second. 12 CO-CHAIR FATHER PIUS: All in favor? 13 (A chorus of ayes.) 14 CO-CHAIR FATHER PIUS: Okay. So now we will go to the panel presentation. And I have Ronké --15 16 MS. HUGHES: Yes. 17 CO-CHAIR FATHER PIUS: Thank goodness. Ronké Hughes from the Legal Services Corporation is going to 18 19 introduce the members on the panel for this afternoon. 20 So thank you. 21 MS. HUGHES: Thank you. Thank you, Father 22 Pius and thank you, Gloria Valencia-Weber and the other

members of the board, for the opportunity to be here
 with you this afternoon. My name is Ronké Hughes and I
 work as program counsel in the Office of Program
 Performance. And I'm here today with this wonderful
 panel to discuss best practices for effective intake.

I am not going to do this in order, however. б 7 We have Beverly Allen with us, a managing attorney at Land of Lincoln Legal Assistance Foundation; we have 8 Joan Kleinberg, a manager of northwest Justice 9 10 Project's Coordinated Legal Education Advice and 11 Referral unit, or CLEAR; we have Frank Tenuta, a 12 managing attorney from Iowa Legal Aid; and Adrienne 13 Worthy at the end, there, executive director of Legal 14 Aid of West Virginia.

Before we begin, I would like to provide a framework for the discussion this afternoon and start with the LSC performance criteria. Performance area 2 sets forth the core values and tenets for creating and maintaining effective relations with clients.

20 Criterion 2.1 addresses how grantees engage 21 and serve the client population, specifically exploring 22 whether intake is efficient, conducted in a way that is

1 culturally sensitive, and whether the approach to client services is based on the need of the community. 2 Similarly, standard 4.1 of the ABA Standards 3 for the Provision of Civil Legal Aid, provide that an 4 5 intake system should be designed and operated in a б manner that focuses on treating clients with respect, 7 effectively identifying their legal needs, and promptly making determinations about service. 8 9 As the panel discusses the intake functions at

10 their respective programs, there are some key themes 11 from the performance criteria and the ABA standards 12 that ground the best practices that we'll discuss.

13 Those are that the intake systems must be 14 tailored to the needs of the community. The 15 communities served are the paramount -- they are the 16 most important part of the intake system when you're 17 considering how to design it. The other part is that 18 the intake systems have to provide efficient and 19 effective service.

20 Another important component of an effective 21 intake system is going to be the technology that's 22 used, and the LSC technology baselines acknowledge the

important role of technology in legal aid service
 delivery.

You're going to hear about four different 3 4 approaches to intake today. The approaches, while 5 different, each embody the principles found in the б performance criteria and the ABA standards. What you 7 will find is that there's no single intake model or system that works for every grantee. Intake is not a 8 9 one-size-fits-all proposition. Instead, each community 10 benefits from the system that is designed to meet its 11 needs.

12 And with that, why don't we have our panel 13 begin by providing a brief description of your intake 14 system. And we can start with Adrienne.

15 MS. WORTHY: I'd like to give you just a 16 little bit of context for Legal Aid of West Virginia's 17 intake system based on our service area. We are a statewide program that covers 55 beautiful mountainous 18 19 counties in West Virginia. About 1.8 million people 20 live in West Virginia. So as you will see from our 21 colleagues and where they're from, we're the smallest 22 state. Several of them are double or triple the size

1 of our entire population.

It pains me to say that the who we serve, the statistics are horrible. And particularly as I was preparing for this presentation, it reminded me about the many negative factors related to West Virginia's population.

7 In summary, we are among the poorest, the 8 sickest, the oldest, the least diverse, have the most 9 disabilities, most rural, and least technologically 10 connected state in the country. What that means is 11 there's lots of challenges for our staff of 120 in 12 terms of serving this population and getting them in 13 the door to meet their legal needs.

14 Our service area is spread, tip to tip, about 15 six hours, from Pittsburgh to Virginia, from Kentucky 16 to the Washington, D.C. suburbs. We have chosen to 17 have a centralized intake in Charleston -- the other Charleston -- that is both a service office but our 18 19 administrative offices. We have nicknamed our intake 20 system ATLAS, and I know we're not supposed to use 21 acronyms, but that stands for Access to Legal Aid 22 Services.

Now, thinking about who we serve, I think it's
 helpful not to think in the aggregate of the 330,000
 people eligible for our services, but to think of an
 individual. And so for the purposes of today, I've
 thought of Brian, who is a veteran with a disability
 living on a mountaintop in rural Pocahontas County.

7 Brian has lots of options in terms of getting 8 services from Legal Aid of West Virginia. We have 9 multiple access options, including, as of December, 10 online intake. Brian can make a phone call to us, and 11 both our online and our phone services are 12 mobile-friendly. There's lots of supporting 13 information for Brian on our website.

He can go through a local office. We have 12 regional legal offices situated around the state, so Brian can get to a local office. Or he can get to us through a partner agency, and in Brian's case, that might be the VA medical center.

When Brian gets to talk to a staff member, his first contact with us will be with an intake paralegal. We also have in that unit four part-time attorneys who work with us, a supervising attorney, and actually a

number of pro bono volunteers, including an emeritus
 pro bono attorney.

We have a manager who oversees this intake unit, the ATLAS unit, as a way to make sure that the services that Brian gets are integrated with the services throughout our program. And that person works with all of our other units to ensure that that intake unit -- folks are aware of all the variety of services available to Brian.

10 So I'll stop there, and we'll talk about Brian 11 a little bit later.

12 MS. HUGHES: Thank you, Adrienne.

13 Beverly, can you please give us some

14 information about Land of Lincoln?

MS. ALLEN: Yes. Land of Lincoln Legal Assistance Foundation serves 65 counties in central and southern Illinois. We have five regional offices that provided extended services to our clients, and then we have a centralized intake, advice, and referral unit, and one administrative office.

21 The centralized intake, advice, and referral 22 unit is called LARC, Legal Advice and Referral Center.

We are housed in the building with our central regional office and our regional office. We have approximately 103 employees at Land of Lincoln Legal Assistance Foundation; 61 of those employees are attorneys.

б Seventy percent of our new applicants that 7 come into our program are served by LARC. We have seven part-time attorneys, one full-time attorney, one 8 9 intake specialist, one administrative assistant, and 10 myself, the supervising attorney, that work at LARC. 11 I think in 2014 we had about 12,000 clients 12 that we served program-wide, a little bit over 12,000. 13 I would say that we have been in existence -- LARC has been in existence since 1998, and as time has gone on, 14 we have tried to come up with innovative ways to serve 15 16 our clients. And one of those ways is through online 17 intake.

We have several avenues ourself in which we allow applicants to come into our program, and the biggest one, of course, is via telephone; now, online intake; and we still allow walk-ins into the central regional offices. And we have court projects where we

do intake as well. And then we also do intake through
 community outreach.

3 So we try to have as many avenues of access as 4 we possibly can to make sure that we reach as many 5 clients as we possibly can. Of course, the struggle is 6 that we can't reach everyone, but we are trying to 7 reach as many as we can.

8 MS. HUGHES: Thank you, Beverly.

9 And Frank?

10 MR. TENUTA: Thank you. Just a little 11 background on Iowa Legal Aid. We have a staff of about 12 120 people, including 64 attorneys, and we have ten 13 regional offices covering 99 counties in the state of 14 Iowa. This last year we closed approximately 16,300 15 cases, helping nearly 38,000 Iowans, including 16 children.

17 Our intake system is what we call a unified 18 intake system. And we call it intake.

19 (Laughter.)

20 CO-CHAIR FATHER PIUS: What does that stand 21 for?

22 MR. TENUTA: No acronyms. And we actually use

staff in all of our offices to be part of the intake system, which is why we call it an intake system as opposed to an intake unit, because it's not a separate group of people, although we do have a number of people who work more in intake and some people who work less. We also do intake -- people can walk in, they can go online, or they can access our services by telephone.

8 We currently have five attorneys who are 9 primarily doing intake, and then we also have a couple 10 of part-time paralegals. And then we rely heavily on 11 our support staff to do the screening, which is the 12 name/address/income eligibility kind of thing. I think 13 we're moving towards using more intake paralegals.

14 That's one of the things we're looking at.

We also have -- our system is managed by two managing attorneys who do that part-time, and I'm one of those two managing attorneys. In addition, I also manage our local office, and that's sort of in keeping with the way we do things. Our staff is really involved both in intake and client service. MS. HUGHES: Okay. And Joan? Share with us,

MS. HUGHES: Okay. And Joan? Share with us,please.

MS. KLEINBERG: Northwest Justice Project came to our current intake system from a little bit different direction than other programs. It was born out of the state plan for the delivery of civil legal services that was developed in 1995, back at a time when there were some very dramatic changes happening in the legal services landscape.

8 And the plan -- at that time there were some consolidations. Northwest Justice Project was a new 9 10 program, developed with the intention of being the LSC 11 grantee. And within this plan, one of the roles that 12 was assigned to the Northwest Justice Project was to 13 serve as the primary entry point for low-income people 14 across the state of Washington who were seeking legal 15 aid.

And to carry out that role, we developed a statewide hotline, which I'm sorry to say does have an acronym name. We call it CLEAR, Coordinated Legal Education, Advice, and Referral, although I like the idea of calling it intake.

21 (Laughter.)

22 MS. KLEINBERG: And CLEAR is the primary point

1 of entry into the system, so that we work in

2 coordination with our own offices. And perhaps I3 should back up just to paint that picture a bit.

We are a statewide program. We have 13 regional offices and four satellite offices around the state. We have a staff of a little bit over 200 people spread among those offices.

8 Back to CLEAR. We do intake not just for 9 Northwest Justice Project but for the network of 17 10 local bar-sponsored volunteer lawyer programs around 11 the state, as well as a number of other freestanding 12 specialty projects such as an unemployment law project, 13 one that does Social Security advocacy, and -- I'm 14 trying to think if there are others.

But we maintain information about all of these programs in our database, and we're kind of the traffic cops. People come in at CLEAR, and our goal is to get them out to the right program on the first try so that we're not churning people around.

20 One of the big changes that happened in '95 21 was there were a number of different doors somebody 22 could have walked into looking for help. And what we

wanted to avoid happening was for that person to go into door number one and be told, no, we can't help you; go to door number two. And they would say, oh, we can't help you; try one and three. Time would be passing as well as client frustration increasing. So our goal is to get the person to the right place at the right time, or to one of our own offices.

8 Something else that we thought of at that time that we centralized intake, which was a very big change 9 10 within the service providers in Washington, was to try 11 to really work with maximum efficiency to centralize 12 tasks that were amenable to centralization, such as 13 screening and triage and advice, and free up the staff 14 in our field offices to really work on tasks that you needed to be local for -- being in court, engaging with 15 16 community partners. So it kind of divided the work in 17 a different way than we ever had before.

18 MS. HUGHES: Thank you.

19 Next I'd like to talk about the time, the time 20 that it takes for a client to get assistance from your 21 program. And I think that's important for each of you 22 to comment on. And why don't we start with you, Frank.

1 MR. TENUTA: Okay. Thanks. Our biggest chunk 2 of intake is done by telephone, which I think is what 3 probably most programs would find now. Of course, we 4 do some online intake and then also the walk-ins. But 5 since most of our people are telephone, our system is 6 set up so that they get to talk to an attorney when 7 they do the call-in and when they get screened.

8 So when someone calls in to get assistance, 9 they first will talk to an intake screener. And then 10 after the screening is completed, we have an average 11 wait time of about two minutes before they speak to an 12 attorney about their case. They're actually given the 13 option after about one minute of having a callback or 14 just waiting a little bit longer.

About 75 percent of our callers are talked to by an attorney live on the first call-in. Another 25 percent are callbacks. And then we try to make decision on -- they're provided advice on the spot when they talk to an attorney.

20 So for most people accessing our services, 21 they're going to talk to an attorney, explain their 22 situation, and at least get some initial advice on that

first call. And then we try to make a determination on
 actual representation within about a week.

And I think doing it this way -- I've been at 3 4 Legal Aid of Iowa for 30 years. And when I first 5 started doing intake, we scheduled appointments for б people, and a lot of them were no-show. Because the 7 people that we're helping, frequently they have a lot 8 of things going on, and what's the most pressing 9 problem right now? And some of those things might not 10 get addressed. And so we were losing a lot of people. 11 And of course, there's been a big progress in 12 how we do intake over time. But I think being able to 13 talk to an attorney when you call in has been a big

14 help in getting people that information that they need 15 right away.

16 MS. HUGHES: Thank you.

17 Beverly?

MS. ALLEN: At the Legal Advice and Referral Center, the applicants, most of them, speak to an attorney right away, immediately. Except for our foreclosure and divorce cases, they speak to an attorney. For the divorce cases and our foreclosure 1 cases, most of them speak to an intake specialist.

It takes about five to 15 minutes to qualify an applicant for our services, and then another 15 minutes to interview them, and approximately another 15 minutes or so to provide them with advice if they only qualify for advice.

7 If they qualify for a referral to a regional 8 office, they are referred to a regional office that 9 day. And then they are also informed that they should 10 hear from the regional office within 48 hours, except 11 one office; they will speak to them the very next day. 12 But it's a pretty quick turnaround for the applicants 13 when they first initially contact our office.

MS. HUGHES: Okay. And Adrienne, if you cantell us what's happening in West Virginia.

MS. WORTHY: Like Frank, our system is based on most of our folks coming in through the phones. We received about 15,000 phone calls to ATLAS in 2014. When someone like Brian, who I referenced earlier, calls, in our system they talk with a paralegal first, and the focus there is on eligibility and learning about the legal problem, and then we figure out where

1 we go from there.

2	Wait times for a paralegal, to get to a
3	paralegal, can vary. Folks can get an immediate answer
4	to their phone call, or wait times can be as much as 14
5	minutes. We are working to bring those call times
6	down, but one of the things that we've
7	implemented or two things we've implemented that
8	have been interesting, one is a callback system like
9	the others mentioned, where people can keep their place
10	in line, but instead of using up their cell minutes and
11	their time, they can receive a callback from us.
12	The other thing we've recently done is
13	institute some what we are calling Law Line, which are
14	approximately 60 messages that they can opt to listen
15	to while they're on the phone. We find a number of
16	people who are opting for that.
17	The messages are in a variety of different
18	areas. We even have folks who, once they've gotten to
19	a paralegal, have requested to go back into the
20	messages because they were in the middle of listening
21	to something. So we use that as a way to relay
22	additional information while people are waiting for

1 service.

2	Once people get to a paralegal, we do an
3	eligibility, figure out where they need to go. If
4	they're going to receive only advice and brief service,
5	they are likely to be spoken to by an attorney either
б	later that day or the next day. If they are being sent
7	to our local office, that referral will be made and
8	then the local office, if it is a non-emergency case,
9	will address their concerns within three business days,
10	is typically the turnaround time for us.
11	MS. HUGHES: Thank you. And Joan?
12	MS. KLEINBERG: We also handle calls live.
13	The path is to a non-lawyer screener, and then to one
14	of our advocates, most of whom are attorneys. A few
15	are paralegals. That system, for somebody who's in the
16	live process, the time from when they call in till
17	they've spoken with an advocate is probably about an
18	hour.
19	But I will say that the times vary wildly,
20	depending on the number of screeners who are in on a
21	given day and the number of advocates are in on a given
22	day. And we schedule to try to maintain steady

1 numbers.

We limit the number of people who can be out 2 3 on a scheduled absence for a vacation or go to training or something like that, to try to maintain levels. 4 But. human nature is such that illness and sick children do 5 б happen, as much as we wish they didn't. 7 And so the wait times are very sensitive to the level of staffing. And I think that's just a fact 8 9 of life. Again, we don't like it, but we live with it.

10 And if we have a perfect storm of very few of both, 11 then the wait times can become significantly longer. 12 On a really great day, when we have a really good ratio 13 of screeners to advocates, the wait times are very 14 short.

We do then refer cases on from the hotline to 15 16 our field offices for extended assistance. If it's an 17 emergency, the office will jump on it right away, and we communicate that to them. Otherwise, their normal 18 19 course generally is I believe they hold case acceptance 20 meetings once a week. So there would be -- depending 21 on the day of the week that CLEAR spoke with the person and the day of the week that office is doing their 22

1 process, there can be a several-day lag.

2	And then the only other thing that I would
3	mention is that we also have some systems where we are
4	calling people. So for example, we try to be sensitive
5	to time-sensitive matters. And so if somebody were to
6	call our front desk or call one of our offices and say,
7	"I have a hearing tomorrow; I really need help," we
8	have what we call advocate of the day. There's one
9	person who's designated to speak with those people.
10	But we find frequently great difficulty reaching
11	people, even when they're expecting a call, and so
12	those calls.

Also our online intake system, when people have problems with housing or benefits issues, we will call them. But again, it can sometimes take several days to actually connect with somebody. So we prefer the live model. It's the client's best route in to us, but it doesn't always work for them.

19 MS. HUGHES: Thank you.

20 So now I think it would be helpful for us to 21 share some of the best practices that have been 22 implemented at the various programs. And Beverly, can

1 we start with you?

2	MS. ALLEN: Of course you can.
3	MS. HUGHES: Thank you.
4	MS. ALLEN: At the Legal Advice and Referral
5	Center, we also have multiple access points, telephone
6	being the main one, kind of like all the other
7	hotlines. And we also have online intake, which the
8	applicants have access to 24 hours a day.
9	At the Legal Advice and Referral Center, we
10	operate Monday through Friday half-days, from 9:00
11	until 1:30 p.m. We're open during the lunch hour to
12	allow working applicants to call in on their lunch
13	breaks.
14	In 2014 we launched the online intake as
15	another access point in collaboration with the other
16	two major legal services programs in Illinois and
17	Illinois Legal Aid Online and PSTI, which is the
18	company that provided our case management software.
19	Applicants who comply with home ownership
20	issues, we slightly modify our process with those
21	applicants. That queue that we have for our
22	foreclosure cases is staffed by an intake specialist

because most of those cases are referred to the
 regional offices for extended services. And we also
 have a divorce queue that's staffed by the intake
 specialist for the same reason.

5 And our hours of operation for our foreclosure 6 calls is much longer because we are allowing people 7 with home ownership issues an extended amount of time 8 to get into our program. So those hours of operation 9 is from 9:00 until 4:00. All other applicants who 10 apply online, they are instructed to give us a call 11 back.

12 Now, the foreclosure applicants, we allow them 13 to set dates and times that they will be available to 14 be reached. We also like the live contact, and we try 15 to steer away from callbacks. But when they're 16 applying online, we give them the opportunity to allow 17 us to call them back. And actually, for online 18 applicants, that has been more successful when they 19 give us a date and time that they could be reached. 20 And then we will call them back.

21 All other applicants who call our hotline, 22 they call what we call the general queue, and they

speak to an attorney right away. We have a telephone system that we acquired that allows us to monitor our calls live so that we can see the call flow, the number of calls that come in when our lines get full and get busy.

б We have reporting capabilities with our new 7 telephone system. And we also have the callback feature of that telephone system that allow applicants 8 9 to call in, hang up the phone, but maintain their place 10 in line, so for those applicants who are using cell 11 phones so that they can save their hours on their 12 phone. And that has been very successful, the automatic callback feature. 13

As I mentioned, we have four queues -- the general queue, which is staffed by attorneys, the foreclosure and divorce queue, which is staffed by intake specialists and another attorney, and then we have what we call the priority queue.

19 Those applicants who call the
20 foreclosure/divorce queue who do not qualify for
21 referral to the regional office for extended services,
22 they will be transferred into what we call the priority

queue so that they can be next in line to speak to an
 attorney to receive advice.

The attorneys who are staffing the hotline, 3 4 they do everything, as I mentioned earlier. They do the screening. They qualify the applicants for our 5 б services. They will interview them to determine the 7 nature of their program. And then if they qualify for referral to the regional office for extended services, 8 9 they will be referred to the regional office the same 10 day.

11 If they do not qualify for referral to the 12 regional office, then the attorney will attempt to 13 provide them with advice. If there's no advice to be 14 given, then we will try to find other resources to 15 refer them to. So we try to provide them with some 16 sort of assistance if we cannot give them the ultimate, 17 which is representation by one of the attorneys in the regional offices. 18

19 The Legal Advice and Referral Center took on a 20 project last year where we used business process 21 analysis to basically take a look at what we're doing 22 at our hotline to make us more efficient so that we can

better serve our clients, and also to extend our
 services in the housing and consumer area.

And when we did that, basically we changed some of the ways that we do business. We changed the way the managing attorney operates or manages the hotline. We tried to make ourselves more efficient. We went to a paperless operation. We created scripts for the attorneys and the intake specialists to use.

9 We drafted canned advice notes for those 10 common issues that come across our desk every day. And 11 then we also tried to standardize the case acceptance 12 policies that the regional offices use to let us know 13 what types of cases they want referred to them so that 14 we can make our process a little bit more efficient.

15 And each day, as we grow, we try to serve as 16 many clients as we possibly can and become as efficient 17 and client-friendly as we possibly can.

18 MS. HUGHES: Thank you.

And Joan, can you tell us what's happening at NJP in terms of the strategies that you all are recommending?

22 MS. KLEINBERG: Well, are we on best

1 practices?

2 MS. HUGHES: We are. 3 MS. KLEINBERG: Yes. I think I can give you 4 four pretty quickly. 5 MS. HUGHES: Great. б MS. KLEINBERG: One, and Beverly touched on 7 this, these days I think having a provision for people who are using cell phones is critical. Otherwise 8 9 you're burning through their minutes and their 10 batteries, and they're on the phone when you get to them because the battery died. 11 12 Intake systems have to make provisions for 13 people who have limited time issues. We have our 14 systems, but our clients' lives tend to happen on very 15 short notice. And so somebody can't be needing to call 16 in day after day till the call gets answered. 17 And so, as I mentioned, we have both the 18 attorney of the day system and our online intake system 19 as well can expedite connecting with somebody who's 20 working against a tight deadline. 21 Language access, critical. Our clients don't speak only English. And so every intake system needs 22

the capacity to communicate with clients in the language in which they speak. Telephonic systems tend to use a telephone interpretation system, which are actually pretty amazing, where you can conference in an interpreter who speaks just about any language that you can find.

7 And then, finally, a system has to have, if 8 it's a telephonic system, provision for people who have 9 access barriers to using the phone. And in our case, 10 even though we've largely shifted the intake function 11 to the hotline, all of our offices know that they are 12 expected to perform that function if there's somebody 13 for whom the hotline just does not work.

14 MS. HUGHES: Thank you.

15 And Frank, what about in Iowa?

MR. TENUTA: Just a little bit more about our online system. We started that in 2014, and we actually started it sort of -- rolled it out slowly before then. But that was when we really got it going. And at that time, about 5 percent of our cases came in through the online system in January of 2014; we were up to 12 percent in December of 2015. Online intake obviously makes it more accessible for some people because they can get to it any time. That's the nice thing about it. Anybody who completes an online application, we use the A2J system, and our database is Pika, and it merges it all in.

б Our staff, our intake screening staff, will 7 then call everybody back and go over their application and make sure that the information is correct, and then 8 9 get them connected with an attorney. They have an 10 opportunity to provide a time that they would be 11 available if there's a particular better time for a 12 callback. We also do walk-ins and, of course, the 13 telephone intake.

14 To go back to the online intake, we're finding that it probably saves our intake screeners about 50 15 16 percent of the time that they spend with a client 17 because of the information already in. And of course that means the client is also saving 50 percent on the 18 19 time, and they have a lot more flexibility as to 20 getting the information in. And then we're still 21 verifying all that and contacting them.

22 MS. HUGHES: Okay. Thank you. And finally,

Adrienne. What best practices are being implemented in
 West Virginia?

MS. WORTHY: Let me tell you about four. First of all, I mentioned the prerecorded messages that we use called Law Line. We have more than 60 messages that provide legal information both after hours and while callers are on hold. And we have found that the messages are very popular. We had more than 9,000 callers who listened to Law Line in 2015.

10 We were actually kind of surprised by that 11 number and decided, because they were so popular, we 12 have created a separate line where people who are not 13 necessarily waiting in the queue to apply but just 14 people who want to access the legal information can 15 call a separate number. And we're just about to roll out some publicity around that, and we'll be interested 16 17 to see how that works.

Another thing that we do, as Beverly mentioned, we pay a lot of attention to intake hours. It's important that people be able to access us at different times of the day. We do, of course, work through the lunch hour.

But we also have worked out to have one evening hour a week. And we do that in conjunction with our state bar's Tuesday Lawyer Connect, where a number of bar volunteers are in our offices taking phone calls from the public.

At the same time that they're taking those phone calls, if they feel like there is a client that would benefit from legal aid services, we have a staff member there and they can switch them over. And then, of course, the public can call in to apply for services at the same time.

12 The third thing I'd like to mention is we feel 13 like that when the hotline is working for applicants 14 externally or for the public, there has to be a high 15 degree of communication among our staff to make that 16 happen.

And so we've created something that we call our client access advisory team, which has staff from all over the program, each of our 12 offices, in a variety of different positions where the system is touched by clients. And these folks meet on a quarterly basis really to do a lot of evaluation of the

1 systems that we have.

2	We met yesterday before I left to come down
3	here, and the focus of that conversation was on
4	additional Law Line messages, ones that should go, new
5	ones that we should create, as well as the wait time
6	issue, trying to figure out some ways to really address
7	that.
8	And then the fourth thing I'd like to
9	mention others have talked about online
10	intake we're pretty new to the game. We just
11	started on December of 2015. So we've had just about
12	two months of online intake.
13	And without any promotion externally except a
14	button on our website, we've gotten 331 online
15	applications, which is about seven a day. So we've
16	been pretty pleased with that because we do plan on
17	doing a campaign around online intake and other ways to
18	access our services in the spring.
19	CO-CHAIR FATHER PIUS: Just to compare, how
20	many calls do you get a day? Just so I can compare the
21	numbers. A lot more than seven, I would imagine.
22	MS. WORTHY: Yes. Very much so.

1 CO-CHAIR FATHER PIUS: But you don't get like 2 a hundred calls. You're talking like maybe 40 or 50 3 calls a day?

MS. WORTHY: I'm not very good at math. But we get 15,000 a year. So I'll let somebody else do the math. We've been getting a lot of anecdotal positive feedback on the online intake, and we've looked to see how people are accessing our website to give us some jidea about how they might be accessing the online intake.

And we see that about half the people are accessing the website through their mobile phone, and about 47 percent are accessing through a desktop computer, and then the rest through a tablet. So as we're thinking about online intake, that's certainly going to be important.

And then just one other interesting stat. Ronké had asked us to see if there's any demographics that we can assign to the folks coming in through online access. And so we went back and looked through and saw that 85 percent of those who've applied, so that's 85 percent of those 331 applications, were folks

1 who were under 40 years of age. And that compares to 2 about half of our phone applicants. So we'll be 3 monitoring things like that as well to see where that 4 takes us.

5 MR. MADDOX: Father Pius, can I just 6 interrupt? I've got to leave for a conference call. I 7 just want to say this has all been incredibly 8 interesting and helpful. I have an idea for how all of 9 you could dramatically increase your funding with 10 unrestricted funds, and that is just take your systems 11 to the cable company.

12 (Laughter.)

MR. MADDOX: Or moonlight as consultants. Itis very impressive.

MS. HUGHES: Thank you. So now I'd like to talk about how intake is integrated into service delivery. I think very often people think of intake as a standalone sort of function, and I'd like the panel rather to share how that looks at their program. And Frank, let's start with you.

21 MR. TENUTA: Okay. Well, part of this really 22 has to do with how we're using technology in our intake system. And so we don't have a call center with
 attorneys or support staff or anybody. We have
 essentially a virtual call center, where staff is
 anywhere in any of our ten regional offices. And those
 staff then are assigned to times on the intake.

б And they keep in contact with each other 7 through a chat room, and there's a whole complicated system, which I won't go through, in how the calls come 8 9 in, how they're assigned, how they get to an attorney. 10 We even have a separate room where we can assign cases 11 to volunteer attorneys so that they're involved in it 12 because we have a number of volunteer attorneys who 13 just do intake.

14 So we have this complicated system using technology, the voice over internet phone system, of 15 16 course, and our email, and the chat rooms, as I 17 mentioned, to get the calls out to these various people who are doing the intake. And then because our system 18 19 is such that the people who are doing the intake are 20 often the ones also providing services, there is that 21 close cooperation there as well.

22 So the intake attorneys provide a basic

advice, and then the cases are transferred. But it's
 really not transferred because we use a single
 database. Really, they're just -- I like to think of
 our system as using technology to make our program one
 big office.

I like to think about how we used to do intake, and clients would come in or we'd talk to them on the phone. And then we'd all go meet. How do you do that using technology and keep all those people involved?

11 So our system involves all these intake 12 people. And even though someone is in Dubuque and 13 they're interviewing the client, they give that initial 14 advice. They have a way to check what Sioux City staff 15 is available, what kind of cases that are available, 16 and then that case is sent on to me or, for some 17 offices, they use an intake reviewer that screens through the case to make some kind of initial 18 19 determination.

20 And then also there's a more formal staff 21 meeting later on, where decisions are made about 22 whether we're going to provide assistance, or more

1 assistance, because everybody's going to get advice.
2 And then it all goes back so that if we're not going to
3 provide extended representation, the same person that
4 talked to them the first time is the one that gives
5 them, unfortunately, the bad news: Well, we can't give
6 you any more help here. But they don't feel like they
7 got thrown around to all these different places.

8 So that's one of the ways that at least we're 9 trying to make sure that that system of intake is 10 integrated in with the service provision. And I know 11 our program feels that that's very important because 12 you feel like you're part of it even if you're not 13 doing a lot of intake.

And I have a couple of attorneys in my particular office who do intake full-time, and then a couple of attorneys who don't. And there are staff in all different offices in a similar way. And I think it really helps us keep connected.

19 MS. HUGHES: Thank you.

20 Joan, how is intake integrated into service 21 delivery at NJP?

22 MS. KLEINBERG: I think one of the most

1 salient features is that we don't view CLEAR in a silo. So the CLEAR attorneys and paralegals are very much 2 3 part of everything else that we do at NJP. So they 4 serve on legal problem task forces, which is a great way for them to be able to communicate to other people, 5 б here's what we're seeing on the ground and here's what 7 people are bringing to us; and then also for them to know what issues that the task force is interested in 8 9 and working on so that they can make connections when 10 they identify issues that the task force is working on.

11 They also work on what we call our strategic 12 advocacy focus, which is something that came out of our 13 last strategic plan, in which we identified barriers to 14 employment as a focus for a three-year period for some 15 fairly intensive work.

And so again, CLEAR people are involved with the work groups that are working on strategic advocacy focus and connecting the people who are coming into the system with the strategic and affirmative work of the program.

21 Also, as the central portal for not just NJP 22 but for a lot of programs, we keep in our database

information about all of the other providers in the
 state -- what types of cases they're taking, what their
 eligibility criteria area, and they have the ability to
 open and close for referrals.

Again, the idea is that we don't want to be churning clients. We don't want to send somebody to a volunteer lawyer program in Tacoma with a family law matter when they have just maxed out all of their volunteers and they cannot handle one more case.

10 They can let us know: Close us down for a 11 week. Then it'll ease up and we'll be okay. And we 12 can do that automatically in our case management 13 system, which is basically -- say, don't let this one 14 show up as a referral, but next Monday open it back up, 15 and they will show up again.

I think those are -- I will say one other thing that we've done. When we went to the centralized system, where intake used to happen in all of the field offices and then now is happening centralized, people in the field offices did feel something of a loss, I think, when they didn't have client traffic into their offices quite in the same way. And something that we just have started doing in the last year is send out weekly reports to each of our field offices, giving them information about the cases that were handled and closed at CLEAR that they never saw in the field office.

And that's been very helpful in having them feel connected back to the clients in their area to be able to see opposing parties whose names are coming up frequently, and maybe the cases didn't rise to the criteria in which we would refer the case to that field office.

But when you start seeing a certain name or company coming up a lot, then you start thinking about whether there are some practices there that are impacting low-income people. So that's been another good integration.

17 MS. HUGHES: Thank you.

So with the demand for services being so significant, obviously there are going to be some challenges. So I think it would be nice if we could hear about what intake-related challenges the panelists might be facing at their programs, and what strategies

they're using to meet them. And I'd like to start with
 Adrienne.

MS. WORTHY: I think of two challenges. One is the quality and quality oversight. We, as I noted earlier, have a tremendous number of calls coming with folks seeking services. And as a way to handle that call volume, we have a custom-built call center that has reporting capacities and realtime monitoring for our supervisory staff.

10 Our supervising attorney looks at who's 11 working, how long they're on a call, the length of each 12 call and then with an application, and case reviews the 13 quality of the work.

14 It's really a challenge to oversee this work, 15 given the small number of staff that we have working 16 here, but also with the call volume and the number of 17 funding sources and ways that people can be served 18 within our program. So I'd say that's one of the 19 challenges.

The second, I think, relates more to West Virginia, and that is how to expand the use of technology in a way that meets the needs of the folks in West Virginia as well as makes our program efficient
 and effective.

As I noted earlier, we're one of the least connected states in the country. And while many of our folks have cell phones, the availability of high-speed internet, even in urban areas, can be very spotty at best.

8 So while technology is an important piece of 9 our access strategy, we know that we still have to have 10 our local offices; that we have to have mobile-friendly 11 online access; that particularly in our very rural 12 areas, we have to work through service partnerships.

And we have a lot of those, ranging from domestic violence programs to our local Department of Health and Human Resources to veterans' regional centers. And so those public partnerships are really important as a way for people to access services.

And the other thing I would note as it relates to all of this, I feel like culturally, West Virginians are very much into storytelling. And so we know that our systems have to be respectful of that urge to tell stories about their situation and accommodate that, and

that all of those access points need to be respectful
 of that.

MS. HUGHES: Thank you.

3

We have about seven minutes left, so at this point, although I know that the panelists have more that they can share, I'd like to see if there are any questions.

CO-CHAIR FATHER PIUS: Thank you, Ronké. 8 This is Father Pius. Again, I just wanted to express my 9 10 gratitude to you all, to follow up on what Vic said. 11 This was just a very helpful and informative panel. 12 And especially, Ronké, I think this was presented very 13 well, I think exactly the right issues we wanted to 14 hear and in a good and organized way. So a special thanks, Ronké, for what you've done to organize this. 15

16 I'll just ask, it's interesting to me. When 17 we think about technology in the legal services world, 18 we immediately think internet. Right? But it's 19 interesting, in hearing you all talk, is technology in 20 telephony and the advancements in technology in 21 telephony, if I'm pronouncing that word right, is much 22 more critical for something like intake. And being on

top of that and aware of that and aware of the options
 is really important.

And it's one of the things, I think, is missing, for example, in our performance criteria. One, our performance criteria was really done before online intake, so there's nothing in our performance criteria about online intake.

8 But also, then, being aware of that technology and reviewing that technology periodically to make sure 9 10 that you're making the best use of it seems to be 11 absolutely critical for a decent intake system, 12 question mark, I guess. I don't know. Maybe that's 13 just a statement. But it sounds like you're all 14 nodding in agreement, so I won't make that question. 15 So I'll just mark for the record they're all nodding in 16 agreement.

17 (Laughter.)

18 CO-CHAIR FATHER PIUS: I like it when people19 nod in agreement.

All right. Are there any questions? Gloria?
 CO-CHAIR VALENCIA-WEBER: Yes. I join Father
 Pius in appreciation for what you've revealed to us.

The complexity of dealing with this is at times very
 difficult for us to understand when we're just reading
 paper reports.

I do like that you've called attention to something that we sometimes overlook. I was just at the TIG conference in San Antonio, and a number of people there reported, for instance, on the latest Pew survey that stated that 85 percent of American population are within access of internet, broadband or some form.

But it's that 15 percent that is missed in rural areas, almost totally missing in many of the Native American areas in Indian Country. And dealing with those is going to be continuously a struggle because some of it is just elements we're not able to affect.

We can't change geography and flatten mountains and stuff like that. So whatever you have to offer about ways to reach those without those internet and other more urbanized resources would be appreciated.

22 And I would like to also ask a question of

Ronké. Thank you. I'm looking at the performance area criteria 1 that you had them very much address. There is one element, and most of what we've heard is about internal -- how we do our business, what we're struggling to develop, and what we think we're doing well.

7 There is one element there that is external. 8 That is, what is the reputation of the program among 9 the client and community groups? And if you could tell 10 me, and any of these directors, how they go about 11 assessing that. How do you learn what external groups 12 evaluate the things you're doing, what we give you the 13 grant for?

14 MS. HUGHES: Sure. That is an excellent 15 question. I will say that in the work that I do as 16 program counsel, we go about with our program visits 17 interviewing a broad spectrum of individuals in the community when we do a site visit to get a sense for 18 19 how integrated the program is with the community that 20 it's serving, and what the perception is of the 21 community -- I'm sorry, of the program -- by other 22 stakeholders in the community.

1 I think that there may be some other perspectives. And we were going to address evaluation. 2 Just for the sake of time, we nixed it. 3 4 CO-CHAIR VALENCIA-WEBER: I don't want you to 5 get in that deep. But I couldn't hear what they say. б MS. HUGHES: Sure. 7 MS. KLEINBERG: If I could add one thing. We ask callers how they heard about NJP. And I can't cite 8 9 the numbers for you, but the vast majority -- I think 10 if you combine these two categories it's a vast 11 majority, which is they are a former client, which 12 means they were willing to come back for further 13 service, which is a good sign, or they heard about us 14 from friends or family. CO-CHAIR FATHER PIUS: I'm just curious, too. 15 Is that true for all of you? Most of that, you would 16 17 find out that's how they found about you, friends and family or former clients? 18 19 PANELISTS: (Nodding heads affirmatively.) 20 CO-CHAIR FATHER PIUS: Interesting. 21 Interesting. 22 MS. ALLEN: At Land of Lincoln Legal Advice

and Referral Center, we send out surveys to every fourth applicant that we provide advice to. And of those surveys that are returned, 80 to 95 percent rate our services from good to excellent. So we try to keep the gauge as to what they think of the services that we're providing via survey.

7 MR. TENUTA: Yes. We do that as well. We 8 survey about 30 percent of the people who go through 9 our intake application system. And we get 17 percent 10 of the surveys returned, which is a pretty good 11 percent, and pretty close to 90 percent rate us as 12 good, very good, or excellent. That's over -- since we 13 started doing the surveys in 2008. And I noticed the 14 numbers that the other people had were very similar.

MS. HUGHES: The other thing that I would mention is that a lot of the external assessment comes during the strategic planning and needs assessment phase for each program. And so I know that with the programs that I interact with regularly, focus groups are a part of that needs assessment process.

21 CO-CHAIR FATHER PIUS: Okay. We're running 22 into the grantee presentation time. Are there any more

1 questions or comments? John?

2	MR. LEVI: It's just not really for this
3	group. But I would like to know, do we know actually
4	how many of our grantees don't have an online component
5	to their intake?
6	MS. LABELLA: I don't have that at my
7	fingertips. But we are able to access that data from
8	the grant application process, which we just completed
9	for the 2016 year. And so we can get that for you.
10	CO-CHAIR FATHER PIUS: Yes. Just a followup
11	email. I'd just be interested about what percentage.
12	MS. LABELLA: Yes.
13	MR. LEVI: I think it would be helpful. And
14	this certainly gave powerful
15	MS. LABELLA: Right. And I think the
16	experience that these grantees have expressed with
17	online intake is definitely one across the board, that
18	they have statistics to show that it increases the
19	efficiency.
20	It shortens the time of the whole intake
21	process, and particularly the staff involvement on the
22	phone with completing the intake process. So it is

something that has been proven to have great efficiency
 gains.

3 CO-CHAIR FATHER PIUS: And I agree. And even 4 to the technology for the telephones. I mean, if 5 you've got somebody who's just got a 1-800 number and 6 an answering machine, that's a problem. Right? And if 7 they're not having some of these technological add-ons 8 to their telephone intake, because that's the big 9 majority, that signals a huge problem, I think.

10 Anyway, any other questions or comments for11 this panel? Julie, did you have anything?

12 MS. REISKIN: That's okay.

13 CO-CHAIR FATHER PIUS: I'm sorry. I'm sorry,
14 Julie. And you can certainly follow up individually
15 with them afterwards.

I really thank you all, not only for your presentation, but really for the work that you do in the field. You do an important service, as you all know. And please go back to your home states and your home programs and please thank them on our behalf for all the great work that they do for the poor, and please ask them to keep continuing gung ho in the work

1 that they do.

2	So thank you. You are the face of the legal
3	services to the poor, and you are a lifeline for so
4	many. So thank you for your time, thank you for your
5	presentations, and Ronké, thank you for a wonderful
6	presentation as well. Thank you.
7	MS. HUGHES: Thank you for the opportunity.
8	(Applause)
9	CO-CHAIR FATHER PIUS: And how long do you
10	want to wait? Do you want to wait five minutes?
11	MR. LEVI: I think we'll have five minutes.
12	And I think we'll defer
13	CO-CHAIR FATHER PIUS: Actually, before we do
14	that, then
15	MR. LEVI: We need to keep your meeting open.
16	CO-CHAIR FATHER PIUS: Yes. Can I have a
17	motion to table this committee's meeting until tomorrow
18	afternoon?
19	MOTION
20	MS. REISKIN: So moved.
21	CO-CHAIR FATHER PIUS: Is there a second?
22	MR. LEVI: Second.

CO-CHAIR FATHER PIUS: All in favor? (A chorus of ayes.) CO-CHAIR FATHER PIUS: Okay. This meeting is tabled until tomorrow afternoon. (Whereupon, at 3:49 p.m., the meeting was adjourned, to reconvene the following day, Friday, б January 29, 2016, at 2:00 p.m.) * * * * *