

The Results of Operating Self-Help Branch Offices in Low Income, Minority Communities Wayne Moore 3/4/03

In response to cut-backs in funding, many legal services programs have had to close some of their branch offices. While necessary, these cost savings have come at a dear price. These programs have become less visible in those communities formerly served by their branch offices. Circuit riding has helped address this problem, but it lacks the visibility and presence that branch offices once provided. Further, circuit riding can be inefficient as significant staff time can be spent in travel and client no-shows can cause staff to be underutilized. Technology has created the opportunity to re-establish branch offices at a fraction of the original cost. This is because these offices can be operated by a single paralegal supported by a specially designed website and staff located in the program's main office. These branch offices can be located in one or two rooms of a community agency, church or other facility that serves a low-income, minority neighborhood. A wide range of services can be provided in these offices. The paralegal can navigate the website for the client and print out a wide range of self-help information, which the paralegal can then explain to the client. The paralegal does not need to be proficient in the law, as the website contains the expert information needed by the client. The paralegal can contact the

main office staff to help identify the client's legal issues and the website information that pertains to these issues.

The website can contain a document generator that allows the paralegal to prepare a wide range of legal documents and letters such as small claims complaints and letters to creditors advising that a client is judgment proof. Drafts of these documents are e-mailed to the main office for review and modification, and then e-mailed back to the branch office for the client's signature. The paralegal can also connect the client to the program's hotline if legal advice is required or to the intake unit via video conferencing if full service is needed.

AARP's Legal Counsel for The Elderly has been operating several of these branch offices for over a year. Our "branch" offices are open only one or two days a week and the same paralegal staffs all the offices since they are open on different days of the week. We also opened a branch office in a community agency which is operated entirely by non-attorney volunteers who were recruited by the community agency. These volunteers are supervised remotely by staff in our main office. Since these volunteers are primarily navigators and document processors using the website, they do not have to be knowledgeable about the law. However, every case is reviewed by phone with a main office staff person before the volunteer navigates the

website; also all documents that are generated are reviewed by the main office staff before they are released by the client.

More detail about the operation of these branch offices can be found in my article: *The Future of the Delivery of Legal Services*, MIE, Summer 2002, page 6. We are currently working with Probono.net to make the functionality of our website available to programs in all states that are using Probono.net's software to create state-wide legal websites. We also have produced a how-to manual and other material to help programs replicate these branch offices in their programs. For information on the website and free copies of these materials, contact Mary Jo Potter at mpotter@aarp.org or (704) 799-6821.

Results of our First Year of Operation

During the first year, we operated two branch offices, both located in Catholic churches in two different low-income, minority neighborhoods. Each office was open two days a week for 5 hours each day, and staffed by the same paralegal. These were “walk-in” offices where no appointment was necessary. Any DC resident age 60+ could use the office. The first office was located in Southeast Washington, DC, and became a well-established part of the neighborhood with repeat clients and a neighborhood presence. The second office, located in Northwest DC, never became established because of an unrelated problem the church was experiencing.

We are now in the process of moving this office. Thus, the results described below do not reflect offices at full-capacity. In fact, these offices could have easily served two or three times as many clients. The all-volunteer office was established at the end of the year and its results are not included in this analysis.

The two offices served—clients with 274 matters. A total of 326 services were provided to these clients. In 99 of these matters, clients received written legal information or self-help materials printed from the website. Nine clients conducted an on-line benefits check-up using www.benefitscheckup.com. In 19 matters, letters were prepared for the clients to help resolve their problem (one was sent over the internet). In seven of the matters, a small claims complaint was prepared for the client and the client received instructions on how to get to the court, file the pleadings and prepare for the hearing. In five matters, clients filed on-line requests for city services (e.g., abandoned vehicles, trash build-up). In 40 of the matters, the client spoke to a hotline attorney; some of these cases became extended services cases that were handled by the main office.

In 11 matters, the paralegal engaged in telephone negotiations on behalf of the client. In 49 of the matters, the client was referred to a private attorney because he or she was over-income; however, these clients were still qualified to receive the legal information, check-ups, letters, and small

claims complaints provided by the branch offices. In 22 matters, clients were referred to other free legal services programs because the clients were under 60 years of age. In 35 matters, the client received other web services. Thus, of the 274 matters presented, 102 were fully addressed by the branch office, while 40 needed services of our main office (e.g., hotline or full representation), 72 needed additional legal services, (but were not eligible for AARP/LCE services), and 47 were referred for other, non-legal services. The following table provides a breakdown of the matters by problem area.

We made our share of mistakes which proved to be good learning experiences. In finding locations for the offices, we first wrote letters to potential agencies with little luck. We found the best tactic was to drive to the neighborhood we wanted to serve and to simply walk into accessible agencies and churches to determine if space was available. Churches were the most likely to have available space. Generally, government agencies required too much red tape.

We found that many of these locations did not have adequate telephone wiring for our faxes and computers, so we had to pay for upgrades. Generally, the neighborhoods did not have high speed internet access or even reliable internet access which caused continual service disruptions. Sometimes clients had to come back to obtain computer generated information and documents. Therefore, we kept hard copy

versions of the most popular materials on hand. We also had some equipment stolen. Thus, if possible, I would recommend making equipment fully portable by using cell phones, lap tops, and light printers so that equipment can be taken home at night. This may not be possible if the facility is in an area that does not receive cell phone service. This portability also helps if a site doesn't work out and a new location is required.

We also learned not to publicize that we used a website to deliver services for fear of scaring away computer phobic clients. Door to door flyers, signs in churches and other public places, materials left at stores, and mailings all generated clients. We were even able to get volunteers to distribute flyers throughout the neighborhood. This helped us get access to public housing facilities.

We also ended up implementing an appointment system since the walk-in policy did not produce a dependable flow of clients. This also allowed the paralegal to schedule times for presentations at community centers and other outreach.

Costs

The costs of operating a branch office were low. They include the cost of the paralegal (2 days per site), internet access, telephones, publicity, and office supplies. The space was usually free, but we did give one church

a small donation. There are also the start-up costs of laptop computers, a combined printer/fax/copier, and telephones.

Creating Self-Help Offices

A program can easily create several of these offices by assigning a currently employed paralegal to staff the offices. In our case, a paralegal welcomed the opportunity to work in the community and lived near one of the offices. The next step is to look for space in a facility that provides sufficient security as the paralegal will sometimes be working alone. The use of the website platform available from Probono.net is fairly straight forward. Of course, this assumes that the state's website is operational and has adequate legal information and self-help content. To adapt our Probono.net website to your needs, you must develop/acquire state-specific content or use content from your existing state website. The following describes all the information on our Probono.net website and the portions you would need to adapt:

1. Legal Information

- Frequently Asked Questions (FAQs) – (state-specific and national content produced by AARP – available for all 50 states and DC and updated by AARP) (Thus, you would not need to adapt this information);

- Self-help Guides (SHGs) – (state-specific and national content produced by AARP – available for all 50 states and DC and updated by AARP) (you would not need to adapt this information);
- Additional Publications - (national and state-specific – you would need to add state specific links).

2. Legal Documents

- Legal Forms - (primarily state-specific – you need to supply these);
- Court Forms (Small Claims Court Filings) – (state-specific – you need to supply.)

3. Complaint Letters and Information/Service Requests

- Complaint Letters- (primarily AARP complaint letters – national and state-specific (e.g., landlord/tenant) – state specific letters would have to be adapted by state);
- Housing Complaints- (state-specific – to be adapted by state);
- File a Consumer Complaint with the FTC- (national) (state would not need to adapt);
- Requests for Government Services - (state-specific – to be adapted by state);
- Obtain Vital Records - (national) (state would not need to adapt);

4. Eligibility Checkups

- Public Benefits Checkup - (state-specific version is available) (state would not need to adapt);
- Other Checkups (SS & possibly Legal Checkup) - (national, or as to Legal Checkups – produced by AARP for all 50 states) (state would not need to adapt)

5. Legal Help & Referral - (All legal help and referral information would have to be adapted by the state, with the exception of referral to AARP Legal Services Network (LSN)).

6. Referral to Social Services Agencies – (state-specific – to be adapted by state).

Related Sites of Interest – (national and state-specific – state-specific sites to be developed/adapted by state). Again contact Mary Jo Potter at mpotter@aarp.org or (704) 799-6821 for more information.

The final step is to purchase the equipment and install it if more portability is not possible. Expect that it will take some time to generate a flow of clients. This does not reflect a lack of need, but the reality that it takes a while to educate the community about your availability and the services offered. It can take six months to develop a good flow, and as much as a year to reach full volume.

Conclusion.

We believe these self-help offices allow a program to inexpensively establish a presence in low-income, minority communities. They can become an important part of the community and be easily accessed by its residents. Through technology, these offices can provide a full range of legal services and can resolve nearly half the matters presented without referral to the program's hotline or intake unit.