

Components of Start-Up: The Big Picture

This is a list of the issues you will have to address start to finish in setting up a hotline.

- 1. Big Picture and Getting Started** *(Roadmap to Implementation Part I and II)*
 - Vision of Hotline
 - Statistical Goals (increased full representation, increased numbers served, increase in specific population served, decrease in hold time, increased hours of operation, increase in geographical area served)
 - Models of Hotlines
 - Scope of Hotline (intake, C/A, brief service)
 - Hotline Services
 - Barriers to Hotline and Concerns
 - Budget Overview and Considerations
 - Staff Resistance and Buy-In Approaches
 - Goals of the Hotline for Staff
 - Goals of the Hotline for Clients
 - Goals for larger legal aid network
 - Baseline Data Collection
- 2. Staffing**
 - Supervision models
 - Staffing models
 - Hiring considerations
 - Remote versus centralized
 - Bilingual considerations
 - Attorney versus paralegal
 - Law students and pro bono volunteers
 - Existing versus new staffing
 - Mixed staffing
- 3. Room and Equipment**
 - Central office needs
- 4. Technology**
 - Telephone Technology
 - Case Management System
- 5. Ethics, Policies and Conflicts**
 - Existing conflict policies by office
 - Existing eligibility practices by office
 - Redefined eligibility and conflicts practices for Hotline
 - Documentation of defined approach
 - ABA Standards as a Guideline
 - Unbundled Services protocols and ethics
 - Ethics on Counsel and Advice and Limited Representation
- 6. Materials and Supervision Structures**
 - Necessary Materials
 - Case Handling Protocols (Case Acceptance Criteria; Case Triage)

- Questionnaires
 - Scripts
 - Referral Networks
 - Self help
 - Online resources
 - Policies for Staff Involvement and Review
 - Policies for Updates
 - Integration of materials into technology venue (CMS, HotDocs, Website, Word, Paper)
- 7. Training**
- Training date and content
 - On-Going Training
 - Staff involvement
- 8. Hiring and Retention**
- Job Descriptions
 - Pitfalls and Lessons Learned
 - Skills needed
 - Performance standards
 - Retention
- 9. Integration with Programs and Existing Services**
- a. Full Service Staff or Programs**
 - Communication mechanism between Hotline and Full Service Staff
 - Role of Hotline with Full Service Staff or Other Programs
 - Sample mechanisms of integration and data sharing
 - b. Integration with Statewide Website**
 - Mechanisms of Integration with Statewide Website
 - c. Integration with Partner Agencies**
- 10. Evaluation and Statistics**
- a. Baseline statistics & On-going methods of reporting:**
 - Cases by office
 - Cases by LEP or age
 - Percentage of C/A versus full service
 - Hold times
 - Problem code statistics