

Memo

To: Intake Meeting Group
From: Ellen Hemley
Date: December 9, 2009
RE: Summary of issues discussed at November 24, 2009 Meeting

I enjoyed talking with all of you last week. Following is a summary of the training-related issues that you raised. I have taken the liberty of organizing these topically and then commenting on whether or not CLAE has existing training resources related to these and, if so, to what extent these would need to be modified.

- 1) Client Interactions:** Group members identified a number of different topics related to client interactions including:
 - a) **Basic customer service skills:** We have a new module on basic customer service that includes presentation and practice using case scenarios in which participants practice skills related to: 1) delivering bad news; 2) de-escalating an angry customer; 3) placing a caller on hold; 4) beginning an intake screening call; 5) explaining the absence of a co-worker and taking a message for an absent coworker; 6) ending a call; and, 7) dealing with an inappropriate and harassing caller. This module was developed for use in an in-person training but, we think, can be adapted for web-based use.
 - b) **Basic Listening skills:** With some overlap with above customer service module, we have a module on “basic listening skills” developed for Mississippi call center staff. This session provides an overview of effective questioning and listening skills generally and specifically in the context of the first two stages of the intake interview (opening and problem-identification). This is followed by demonstration and practice sessions on questioning and listening skills.
 - c) **Client interviewing and counseling skills:** We have two modules from our recent “Essential Skills for Paralegals and Legal Assistants” training on client interviewing and counseling; these are not specific to telephone based interview and counseling but could work in that context.
 - d) **Working with “difficult” clients; working with mentally ill clients** – CLAE has a module on working with mentally ill clients and how to recognize depression and suicidal tendencies. This is not an area in which we have expertise ourselves but can certainly work with you to create a resource that can be used by local programs.
- 2) Interactions with staff:** Group members identified issues related to supervision, burn-out and motivation.

- a) **Counseling staff/avoiding burn-out:** We have a module on “supportive supervision” which includes pieces on motivation and burn-out. These could be adapted to the intake context.
 - b) **Supervising intake staff:** Any supervision training would need to start with performance expectations. For your information, I am attaching “Call Center Standards of Practice” that we developed for our partners in Mississippi; these might be a useful starting point in developing performance expectations for intake staff. I’m also attaching a description of existing modules within our Supervision skills training which can be adapted for the intake context.
 - c) **Experienced advocates:** Group members identified a number of topics related to experienced advocates including how to keep them engaged and motivated and how to keep their skills up to date and fresh. See above reference to motivation module in supervision training; also it may work to provide them with above supervision training and support their ability to provide substantive skills training. See discussion below.
- 3) **Examining intake systems and structures:** While we do not have training materials on this, we have collected materials on best practices in intake that we used in working with our partners in Mississippi. We would be happy to share these with you and then to think together about whether there are other ways that CLAE can support your collective examination of intake structures and methods.
- 4) **Substantive law training:** While CLAE generally does not provide substantive law training, we can work with you to design substantive training using best adult learning practices. We would also recommend that experienced advocates attend the upcoming Training of Trainers which we hope to confirm soon for spring 2010.
- 5) **Negotiations in context of brief service:** We have a web-based Negotiations Skills training based on the Harvard principled negotiations model. We’d have to talk further about how these basic principles and practices would or would not be applicable. Assuming they are applicable, we could work with you to develop case scenarios relevant to the brief service context.
- 6) **Miscellaneous:** Group members also mentioned topics that I’ve grouped in this miscellaneous category. I wouldn’t yet dismiss these but would need to give them more thought since we do not have existing resources in any of these areas.
- a) How to direct client to get information they really need to get and so they feel they have been heard.
 - b) How to assess whether/to what extent caller/client able to understand information or materials

- c) More assistance understanding technology – find resources for people through web-based resource
- d) Providing training on counsel and advice skills to pro bono attorneys. Note: I'm not sure now if this was about the skills necessary for counsel and advice OR the substantive issues in which pro bono attorneys provide counsel and advice. Need to discuss further.

Call Center Standards of Practice

Stage	Criteria	Doesn't meet standard	Below Standard	Meets Standard	Comment
General	Uses active listening skills				
	Identifies client barriers				
	Uses effective questioning skills				
	Accurately records intake information into case management system				
	Addresses client resistance or objections				
	Explains ... and summarizes....				
	Inquires regularly to confirm client understanding				
Stage 1: Opening	Establishes rapport with client				
	Explains scope of services provided by legal aid program				
	Explains how will conduct intake and kinds of questions will ask				
Stage 2: Problem ID	Identifies and describes type of problem, if any, that organization can serve and what levels of service can provide for each				
	Identifies whether or not eligibility screening is necessary				
Stage 3: Available Services	For cases program cannot serve, identifies whether case requires referral or legal information only & takes appropriate next steps.				
	For cases requiring legal information, identifies				

Stage	Criteria	Doesn't meet standard	Below Standard	Meets Standard	Comment
	appropriate legal information and sends to client.				
	For cases requiring referral, identifies appropriate agency and attempts to transfer case or, if unsuccessful transferring call, provides referral information to client and send follow-up in writing by mail.				
	For cases that program can serve, identifies and takes appropriate next steps				
	Determine whether conflict exists				
Stage 4: Eligibility	Accurately applies financial eligibility guidelines				
	Determines client status and whether this effects eligibility				
	For cases program cannot serve, identifies whether case requires referral or legal information only & takes appropriate next steps				
Stage 5: Keep the Case	Identifies appropriate level of service (emergency, advice & brief service, extended service) and transfers case				

Supervision Skills Training Modules

Session	Description
Introduction to Supervision Systems	This session introduces the essential components of effective management and supervision structures as well as best practices related to each.
Supervision Stages and Cycle	Through lecture, demonstration and discussion, participants review the 4 stages within the supervisory relationship cycle— relationship building, assessment, active supervision, and evaluation – and purposes of and skills related to each.
Constructive Feedback	Constructive feedback is the process of sharing information with another person for the purpose of reinforcing or changing his/her behavior. Effective feedback builds trust, removes interpersonal barriers, and guides others toward improved performance. This session introduces basic feedback and communication skills; supervisors practice providing constructive feedback to hypothetical supervisees.
Supervising Across Differences	Through the True Colors exercise, participants explore issues of difference in how individuals learn and approach work and problem-solving. They then apply these concepts and those related to situational analysis to develop an initial supervision plan for someone they supervise.
Delegation	Delegation is the act of authorizing others with the responsibility to carry out tasks and actions. Successful leaders delegate to empower individuals and teams, build others’ leadership and increase overall organizational effectiveness. This session outlines a five-step process for effective delegation: (1) preparing, (2) planning, (3) discussing, (4) auditing, and (5) appreciating. Using this model, supervisors reflect on and develop strategies for overcoming barriers to and strengthening their effectiveness in using delegation to develop professional and leadership skills of those they supervise and manage.
Supervision Tips & Problem-Solving	Participants meet in small groups to address issues of concern related to management & supervision
Professional Development Planning	Professional development plans are a vehicle for identifying short and long-term professional development goals. This session provides an introduction to professional development plans – what they are and how to work with supervisees to craft them. It also looks at the role of supervisor in helping supervisees identify their professional development goals.
Performance Review & Motivation	This session provides a framework through which supervisors can prepare for and conduct performance appraisals that strengthen

Session	Description
	supervisee motivation, growth and performance.
Conflict Management	This session introduces a variety of conflict management styles and techniques. Participants analyze a style they have used in the past, work through hypothetical situations, and serve as consultants to one another concerning an existing situation at home.
Supervision Systems	This session explores the range of real-life systems (or lack thereof) that support effective supervision. Participants explore and develop strategies for addressing challenges they face in carrying out their roles as legal aid supervisors.