Hotline Training Design Committee

The Hotline Training Design committee was charged with reviewing and modifying existing training resources and developing new resources in areas of intake, advice and brief service.

Committee Members

Jan Chiaretto, Statewide Legal Services
Jane Kinney-Knotek, Statewide Legal Services
Dan Biagiotti, Legal Advocacy & Resource Ctr
Gordon Shaw, MA Justice Project
Michael Raabe, Neighborhood Legal Services
Sheila Casey, Neighborhood Legal Services
Jacqueline Sullivan, South Coastal Counties LS
John Frederick, Pine Tree Legal Assistance
Connie Rakowsky, Legal Advice & Referral Ctr
Liz Segovis, Rhode Island Legal Services
Tom Garrett, Legal Services Lawline of VT

Hotline Training Committee Activities & Accomplishments

The Hotline Training Committee met several times by conference call to review existing training modules that CLAE had posted on the CLAE online campus. Through this review, the group identified three distinct audiences for whom training is needed: screeners who conduct initial intake, eligibility determinations and problem-identification; advocates who provide information, advice and brief service; and supervisors and managers who oversee and guide the work of the first two groups.

Committee members and several others then attended a **day-long training design meeting** on July 14 at Wachusetts Village Inn facilitated by David Cruickshank of Practising Law Institute. In preparation for that meeting, CLAE conducted a **training needs survey** for hotline staff in New England. Forty-two out of a possible 125 individuals responded to the Committee's training needs survey. Of the 42 who responded, 38% had less than three years experience suggesting the importance of training for newer hotline screeners and advocates. At the July 14 meeting, committee members met initially in three groups each devoted to training needs of the screeners, advocates and supervisors; they then prioritized ten training modules to be offered through CLAE's online campus and developed initial training designs for the eight described on the following pages.

Participants in July 14 Meeting: Liz Segovis, RILS; Tom Garrett, Law Line; John Fredericks, PTLA; Jeff Goodrich, LARC; Gordan Shaw, MJP; Jan Chiaretto, SLC; Jacqueline Sullivan, SCCLS; Ray Yox, SCCLS; Julie Hanson, NCLA; Dan Biaghetti, LARC, MA; Ross Dolloff, Zenobia Lai & Ellen Hemley, CLAE.

Hotline Training Design Committee

For Advocates

- **Gathering facts from clients exhibiting challenging behaviors** – through which advocates will be able to: identify behaviors that make it difficult to interview a person; describe ways to respond to different challenging behaviors including how to diffuse anger and how to keep client focused; identify conditions for ending a call; Identify safety protocols and procedures.
- **Issue Identification** – through which advocates, during a first time telephone call, will be able to: clarify at least one legal issue for the client; identify additional legal issues in client's presenting problem.
- **Counseling Client to Empower** – through which advocates, during a first time telephone call, will be able to: articulate a game plan to help the caller resolve at least one legal issue.

For Screeners

- **Customer Service 101**- through which staff will be able to: identify the characteristics of a professional and courteous interaction; give a complete (scripted) preliminary statement about what will happen on the call; conduct a series of structured questions effectively; respond effectively to customer's objections about qualification questions; remind callers of the limits of the screener's service/purpose; identify appropriate ways (language) to complete a screening call.
- **Fact gathering 101 –** through which staff, in an initial screening call, will be able to: identify three categories for eligibility; determine eligible callers; for eligible clients, seek a brief description of client's legal problem; identify ways to help client focus on key facts and concerns; identify emergencies; and; classify and record case type.

For Supervisors & Managers:

- **Supervision Basics** – through which hotline supervisors will be able to: identify three roles of hotline supervisors - as teachers, managers and leaders – in overseeing and guiding the work of individual staff and teams; identify essential elements of effective supervision and management systems in the hotline context.
- **Developing Effective Supervisory Relationships –** through which hotline supervisors will be able to: identify four stages of supervision – building relationship, assessing needs, active supervision and performance evaluation; assess the developmental needs of individual supervisees and utilize the appropriate style for working with the individual; and, help supervisees craft individual learning development plans.

- **Innovative Practices in Hotline Delivery:** through which hotline supervisors and managers will be able to share information about a range of topics such as online intake; technological systems; hotline evaluation; staffing patterns, among others.