

Call 4All Program

“Pro Bono Made Easy!”

The Call 4ALL Program is a simple and flexible program that is a perfect fit for the busy attorney. Volunteers are responsible for one client, one call, one hour a month with no expectations beyond giving legal advice. Our volunteers fit in their referred clients as their schedule allows and have the right to pass on any referral.

Call 4ALL was created to expand Legal Aid’s ability to serve indigent North Carolinians, despite increasing budgetary restrictions. Call 4ALL volunteers allow Legal Aid to perform “triage,” in which volunteers advise clients, and clients with meritorious cases receive representation from local offices or clinics as resources allow.

Volunteer Resources

The Call 4ALL program understands that most of its volunteers are assisting clients in areas that may be outside of their area of general practice. To support its volunteers, Call 4ALL provides a number of resources.

- Volunteers are covered by Legal Aid’s malpractice insurance as long as the legal assistance is pro bono, whether the volunteer is providing advice, limited service, or full representation.
- Mentors
 - Every volunteer is assigned a veteran Legal Aid attorney to be their mentor.
 - Mentors assist the Volunteer with any legal or procedural questions that may arise during their consultation with the client. Mentors are familiar with the legal areas handled by C4A and are available to help with research if the Volunteer encounters an area both they and their mentor are not familiar with.
- Written Materials
 - Basic training materials are online at <http://4allnc.ncbar.org/participate/training-materials.aspx> or www.LawHelpNC.org.
 - Self-Help and instructional materials are available from the volunteer’s mentor upon request.
 - Questionnaires and sample cases for each substantive legal area that Call 4ALL addresses.
- Call 4ALL Library
 - Located at www.ProBono.net/NC. Volunteers specify that they are involved with Call 4All when they join the site.
 - To get to the Call 4ALL Library:
 - Click on ‘Advocate Resource Center’
 - Click on ‘Library’
 - Click on ‘PAI Training Materials’.

- Currently in the Call 4ALL Library
 - Substantive Legal Area written materials
 - Videos
 - Basics of Private Landlord / Tenant Law Video
 - Basics of Public / Subsidized Housing Law Video
 - Basics of Expunctions and Certificates of Relief Video
 - Basics of Foreclosure Law and Foreclosure Defense Video
 - Basics of Custody Law Video
 - Ethics of Call 4ALL and Importance of Pro Bono
- Call 4ALL CLE Webinar Series
 - Webinars provide training in the areas of law that are handled by Call 4ALL volunteers
 - Each webinar is 1 ½ hours long, taking place from noon to 1:30 p.m. on a weekday.
 - The webinars count as Live CLE credit and are free to volunteers.
 - Call 4All offers seven webinars per year for a total of 11 hours of free CLE credit.

| Upcoming Webinar Schedule | | |
|--------------------------------------|------------------------------|-------------|
| <i>Topic</i> | <i>Date</i> | <i>Year</i> |
| Basics of Collections and Exemptions | March 12 | 2013 |
| Basics of Unemployment Benefits | April 23 | 2013 |
| Medicaid & SSDI | 1 st week of June | 2013 |
| Contracts and Warranties | Middle of July | 2013 |
| Bankruptcy | End of August | 2013 |
| Section 8 | Early October | 2013 |
| Substance Abuse | End of January | 2014 |
| Guardianship & POA | Middle of March | 2014 |
| Employment | End of April | 2014 |
| Real Property | Beginning of June | 2014 |
| Education | Middle of July | 2014 |
| Public Housing | End of August | 2014 |
| Wills & Estate Administration | Early October | 2014 |

The Call 4All Process

Client Screening

Applicants who contact the Legal Aid of NC (LANC) Helpline (866-219-5262) are screened for three things:

- Is the applicant financially eligible?
- Does LANC have a conflict of interest with the applicant?
- Does the applicant have a legal matter that is within LANC's area of practice?

File Assignment

If the applicant meets all three criteria they become a client, and are assigned to an attorney. The client assignment is based on the client's deadline.

- If the client has an immediate deadline, then the client is assigned to a LANC Staff Attorney.
- If the client does not have an immediate deadline, then the client is referred to a Call 4ALL (C4A) Volunteer.

Expectations of Volunteer

Call 4ALL Referrals are sent by email. Volunteers are asked to do the following with each referral:

- **Notify C4A staff** within **two days** of receiving the referral that they have received the referral and intend to contact the client, or state that they are unable to assist clients at that time.
- **Contact the Client** for the first time within **seven days** of receiving the referral. The volunteer does not have to finish assisting the Client within this time. The first contact attempt can be as simple as having a paralegal / legal assistant schedule an appointment.
- Attempt to contact the client three times. If the volunteer is unable to reach the client, the volunteer contacts C4A staff so the file can be closed.

All Call 4ALL Referrals are intended to be advice only. The expectations are that the volunteer will:

- Interview the client for the *relevant facts* of the case.
- Tell the client what their *rights* are.
- Tell the client what their *options* are.
- Provide *advice* to the client to empower them to solve their problem on their own.
- *Manage* the client's *expectations*. There is no guarantee that LANC will be able to provide additional services to the Client. C4A asks that the volunteer approach each referral as if the advice they provide might be all the service the client receives. This way it benefits the client if LANC can provide additional service, but does not harm the client if LANC is unable to provide those services.

Beyond Expectations

Volunteers are encouraged, but not expected, to provide additional services for clients. In over 40% of referrals, the volunteer will provide additional services such as:

- Writing a letter on the client's behalf.
- Making calls to the adverse party in an attempt to resolve the situation.
- Helping the client fill out paperwork.

In almost 10% of C4A referrals, the Volunteer has taken the case for full representation. LANC's malpractice insurance will cover all pro bono services provided by the volunteer.

Volunteer Ending Involvement

Once the volunteer has finished assisting the client, they will complete and return to C4A staff an interview summary. The interview summary form is attached to every C4A referral. The interview summary details the relevant facts and goals of client's matter and the advice given by the volunteer. There is no need for a narrative, but having the pertinent information is required to be able to determine if the local office can provide additional assistance. Most of the time the file will be closed with a closing letter and instructional materials sent.

What Happens Next

Once the interview summary is received, the file is sent to the volunteer's mentor / supervising attorney for closing review. The mentor will make sure all relevant information is included in the file to comply with the LANC guidelines. The mentor will also review the information provided by the volunteer in their interview summary, and will use that information to assess if the client can be referred to a LANC local office or clinic for further assistance.

If additional services can be provided to the Client, then the file will be transferred. If additional services cannot be provided to the Client, then the file will be closed. This determination is always made on a case by case basis based on available resources and the case acceptance criteria of the client's local LANC office or associated clinic after the volunteer returns their interview summary.

Alternative Call 4ALL Approach: The Two Call Approach

For volunteers who are younger attorneys, or are volunteering in a legal area they are not familiar with, there is an alternative call approach.

1. The volunteer will call the client for ½ hour to get the relevant facts of the case.
2. The volunteer will contact their mentor to consult with them on the applicable law and the circumstances specific to the client's issue.
3. The volunteer will call the client for a second ½ hour call to go over the advice as determined in consultation with their mentor.

Compliance with Regulations

There are three strict rules which must be followed to comply with LANC regulations and policies that Volunteers will see referenced by C4A staff.

- *Documentation of Continuing Legal Service:* C4A is required to document that there is continuing legal service. The frequency of reminders is determined by the level of service and how long a file has been open. The details of the policy dictate how often C4A must send reminder emails. Without evidence of continuing legal service, C4A must close a file as non-reportable.
- *Documentation of Individualized Legal Service:* C4A is required to have enough information when closing the file to show that there was individualized legal assistance tailored to the Client's situation. C4A must close a file as non-reportable if it violates this policy.
- *Non-Reportable Files:* Are not countable when LANC is applying for funding.

Technology Requirements

- **Hardware**
 - Computers for staff
 - Phones for hotline
 - Printer capable of high volume printing
- **Software**
 - A document management software suite such as MS Office 2007 or newer to ensure the necessary functionality for organization and smart documents.
 - A server that is properly spec-ed and has sufficient capability to support the staff
 - A CRM / Database software such as Legal Files to manage files
 - Needs to have a To-Do / Reminder / Tickler system that will allow the staff to keep track of when files need follow ups.
 - System should have the ability to auto-generate these To-Dos / Reminders / Ticklers
 - Webinar Software that has a large enough capacity for volunteer base for substantive legal area trainings
 - A website that requires a password login for volunteers to access written and video resources in a controlled setting. LANC uses ProBono.net/NC.
- **Staff Requirements**
 - At least one staff member well-versed enough in the use of technology, database software (Ex: Legal Files), and document software (Ex: MS Office 2010) to train other staff and implement more efficient processes
 - Ex: Email templates, blind emails, smart documents, etc...
- **Reliable IT support**

Call 4All Extension Programs

- **Call 4ALL Law School Co-op**
 - Call 4ALL partners with the NC Law Schools to increase the referral capacity of the Call 4ALL program, while allowing law students to develop their legal skills in a practical, real-world setting.
 - Referrals are sent to a faculty professor who supervises the student performing the interview, research, and advice.
 - The law school builds a case study library of real cases, and can build real cases into their courses.
 - This creates a pipeline for new Call 4All volunteer attorneys upon the law student's graduation.
- **Call 4ALL Clinic Partnerships**
 - Call 4ALL partners with various Clinics run by universities and non-profits across the state.
 - Call 4ALL clients that meet the eligibility requirements and have been found to have a meritorious case by the Call 4ALL volunteer are referred to these partner clinics as space allows.
- **Call 4ALL Gold Circle**
 - A group of volunteers who are highly responsive and have consistently handled their referrals with expediency. These volunteers offer the Call 4ALL program the ability to refer files with short deadlines.
- **Call 4ALL All-Stars**
 - A group of volunteers who have consistently shown that they will go above and beyond for Clients. These volunteers are becoming a reliable base for extended service referrals for Local Offices.