



SeniorLAW Center

Protecting The Rights of Older Pennsylvanians

Pennsylvania SeniorLAW HelpLine Volunteer Attorney Training and Procedures

A project of SeniorLAW Center in Philadelphia, the Pennsylvania SeniorLAW HelpLine is an innovative form of legal services offered primarily by telephone, offering free, confidential legal advice, information and referrals to senior citizens age 60 and older throughout Pennsylvania (in all 67 counties). SeniorLAW Center is a nonprofit organization which improves the lives of older Pennsylvanians and protects their rights through representation, education and advocacy, serving over 8,000 seniors each year through a variety of programs and services.

Training

Bonnie Dahl, Esq., Director of the Pennsylvania SeniorLAW HelpLine, trains attorneys to provide pro bono legal advice, counseling and information (limited representation) through the HelpLine, offering a unique and defined pro bono opportunity. David Trevaskis, Pennsylvania Bar Association Pro Bono Coordinator, works with Dahl in many of these sessions statewide. Working on the HelpLine is the signature pro bono project of the attorneys on staff at the PBA. Course participants will learn how the HelpLine operates and why telephone counseling is such an effective mechanism for addressing the legal needs of senior citizens. The course instructs volunteer attorneys on how to handle HelpLine calls, and includes a CD containing a PowerPoint presentation and other training materials, as well as a variety of resources for volunteer attorneys, including a statewide directory of legal resources for older Pennsylvanians. The training is approximately two (2) hours.

Procedure

HelpLine volunteers engage in limited representation *only*: attorneys provide legal information, advice and referrals to senior citizens on any of a wide range of civil legal issues (estates, family law, consumer issues, real estate and more), in which they have expertise and experience. No litigation or on-going representation is required. Services can be provided from the privacy of a volunteer's office or any private location, at dates and times which are convenient for both the volunteer and the senior client.

1. The HelpLine Legal Advocate takes the initial call from the senior. She obtains all demographic information and a brief description of the legal issue.
2. The Advocate then contacts the volunteer attorney, via email, who has the legal expertise or working knowledge of the legal issue about which the senior is calling to discern their availability.
3. Volunteer attorneys are asked to return the senior's call within a 3 business day window. Attorneys are also asked for times during those days that they will be



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available to return the call.

4. The Advocate advises the senior client with date and time to expect the volunteer attorney's call.
5. The Advocate emails the attorney with the appointed time for calling the senior, along with the demographic information and legal issue.
6. Attorney calls the client at the appointed time and provides legal information, advice and referrals based on their legal issue.
7. Attorney enters their advice, information and referrals into Case Notes, which are provided to them on their training CD, and returns in a timely manner, via email to SeniorLAW Center.

Call times vary; most attorney calls last 30 minutes.

Volunteers may be requested to make up to 4 calls a month.

What if the caller has a question the attorney cannot answer?

- Explain that you do not have the expertise in that area
- Offer to have HelpLine call them back in a day or two
- Make a note in the "Case Notes" box
- Let HelpLine know ASAP

The HelpLine serves seniors in *any* area of civil law, so all attorneys can find a place in this unique pro bono opportunity.

Areas of Expertise Most Needed by HelpLine

1. Consumer Issues: bankruptcy, contractor fraud, debt collection
2. Medicaid Eligibility and Medicaid estate planning
3. Real Estate: reverse mortgages, foreclosure, code violations
4. Neighbor disputes
5. Landlord/Tenant Issues

Ideally, HelpLine volunteers provide services in areas in which they have experience or expertise. The HelpLine can also provide training in diverse substantive areas of law if a significant number of volunteers is interested and will commit to a minimum number of pro bono hours. For more information, contact Bonnie Dahl, HelpLine Director, at bdahl@seniorlawcenter.org or David Trevaskis, PBA Pro Bono Coordinator at dkt@pabar.org