



## Referral Process

### SUMMARY

- Clients are screened for eligibility.
- Clients referred to you by ALRP are entitled to a free, one-hour consultation.
- Please follow ALRP's fee protocol; the maximum you can charge is \$250/hour.
- If the referral does not work out, contact ALRP. Please do not refer the client to a colleague or other agency without first consulting ALRP.
- Report back to ALRP on the disposition of the case and the number of hours you worked on the case.
- Thank you for your support and commitment to people living with HIV/AIDS!

### INTAKE

ALRP is licensed by the State Bar of California as a Lawyer Referral Service (Certification #70). When a client contacts ALRP, a Staff Attorney or Law Clerk will conduct an extensive intake interview that helps us determine how we can best serve the client. First, we determine whether the client is eligible for ALRP's services. We establish that the client:

1) is **HIV+ or has a legal issue that is related to HIV/AIDS**, 2) **lives in one of the seven Bay Area counties we serve**, and 3) **has a civil legal issue**.

### DEMOGRAPHICS

In order to comply with funding requirements, our intake process includes a series of questions that capture demographic information including the client's race, gender, source of income, and income level. While some funders target their funds to serve low-income clients, ALRP will serve all eligible clients, regardless of income.

### LEGAL ASSESSMENT

Once we have captured the necessary demographic information, we work with the client to achieve a better understanding of the problem that the client is facing. In some cases we may find that there is not a legal issue presented, and perhaps there is another agency better suited to meet their needs. As we learn more about the situation, we are able to determine what level of service we can provide to the client. We might provide a referral to another agency, short-term legal advice, a referral to an ALRP Panel Attorney like yourself, or full representation by an ALRP Staff Attorney. When a referral to a Panel Attorney is most appropriate, we always 1) check in with the attorney to confirm that they are able and willing to work with the client, 2) give the client the attorney's contact information so that the client can connect with the attorney, and 3) follow-up with the client to ensure they have been able to reach the Panel Attorney. You will never receive "cold calls" from ALRP clients whom you have not previously agreed to consult with.

Many of our clients are in emergency situations and require immediate legal assistance; we ask that you respond quickly to any referral requests, allowing us to arrange referrals expediently. ALRP understands that all of our Panel Attorneys have a myriad of responsibilities, so we will often reach out to several attorneys when attempting to place a referral, anticipating that one or more Panel Attorneys will be unable to take the case. The first Panel Attorney to reply affirmatively receives the

referral.

## **FEES**

All in-house services provided by ALRP staff are free. Additionally, all clients referred to you by ALRP are entitled to a free one-hour consultation. The cost of other services provided by our Panel Attorneys is governed by the ALRP Fee Protocol. Depending on the nature of the case and the income of the client, you may be allowed to charge a fee. That said, roughly 80% of ALRP clients have incomes of less than \$30,000 a year and therefore qualify for most Panel Attorney services at a rate of \$0 an hour according to our Fee Protocol. Panel Attorneys are also expected to tithe back to ALRP 10% of any fees generated as a result of ALRP referrals. Although ALRP inquires about the client's level of income, we expect that Panel Attorneys will have their own procedures in place to verify the client's income in order to determine whether a fee may be charged; when a fee may be charged, we ask that you use ALRP's Fee Protocol to set that fee.

Please note: all ALRP clients who are referred for a simple will are entitled to receive that service free of charge. In this regard, simple wills are defined as those wills that contain no trust language, contain no real property, contain fewer than 15 bequests, and that, standing alone, constitute the only legal services provided by the attorney to accomplish the estate planning work needed by the client. Clients may be charged for the creation of a more complex will or the drafting of a trust. If you draft a will, power of attorney, advance healthcare directive or other relevant end-of-life document for a client, we ask that you provide ALRP with a copy of the completed document so that we may permanently keep it in our records.

## **REPORTING**

After a case has concluded, we ask that all Panel Attorneys provide two pieces of information to the Pro Bono Panel Manager, or through our online form: 1) the disposition of the case, and 2) the number of hours spent working on the case. We use this information to identify opportunities to recognize our Panel Attorneys for the generous work that you do, including profiles in ALRP's newsletter, nominations for State Bar awards, and nominations for ALRP's Attorney of the Year Award. ALRP uses the information you provide on the number of hours worked on a case to determine the monetary value of the legal services ALRP leverages through the Panel. At the end of each year, you will receive an e-mail requesting any information regarding your case hours and outcomes that were not already reported; it will include a table that is pre-populated with any work you have previously reported.

## **YOUR ROLE**

It is important to be aware that not every case we refer to a Panel Attorney will be found to have merit. Part of our responsibility is to help our clients by simply assessing their case. Sometimes your role is to pass along the news that the client does not have a legal remedy. Our hope is that Panel Attorneys will work with ALRP Staff Attorneys and Law Clerks to ensure that our clients get the legal advice they need. This may result in representation, drafting of simple documents, or simply a consultation that helps the client understand the limited remedies available to them in a particular matter. If you consult with a client whose case has merit, but realize that you can no longer be of assistance, we ask that you please 1) make this clear to the client, 2) alert the ALRP Staff Attorney or Law Clerk who made the referral so that we can re-refer the case, and 3) do not instruct the client to let us know on your behalf. In no instance should you refer the case to a colleague who is not a member of the Panel, as our professional liability insurance does not cover non-Panel members nor does our Fee Protocol apply to them. ALRP Staff Attorneys and the Pro Bono Panel Manager are available if needed to facilitate communication between a client and a Panel Attorney. We can also help identify a mentor for Panel

Attorneys who may find the guidance of an experienced peer useful.

**QUESTIONS**

Our goal is to ensure that being on the Panel is a rewarding experience for all of our Panel Attorneys. If you have any questions or concerns about the work you are doing with a client, please do not hesitate to reach out to ALRP's Pro Bono and Development Manager, Claire Clayton at (415) 701-1200 x321 or [clairec@alrp.org](mailto:clairec@alrp.org).