

§ 1620.3

(b) A *matter* is an action which contributes to the overall delivery of program services but does not involve direct legal advice to or legal representation of one or more specific clients. Examples of matters include both direct services, such as community education presentations, operating pro se clinics, providing information about the availability of legal assistance, and developing written materials explaining legal rights and responsibilities; and indirect services, such as training, continuing legal education, general supervision of program services, preparing and disseminating desk manuals, PAI recruitment, intake when no case is undertaken, and tracking substantive law developments.

§ 1620.3 Establishing priorities.

(a) The governing body of a recipient must adopt procedures for establishing priorities for the use of all of its Corporation and non-Corporation resources and must adopt a written statement of priorities, pursuant to those procedures, that determines the cases and matters which may be undertaken by the recipient.

(b) The procedures adopted must include an effective appraisal of the needs of eligible clients in the geographic area served by the recipient, and their relative importance, based on information received from potential or current eligible clients that is solicited in a manner reasonably calculated to obtain the views of all significant segments of the client population. The appraisal must also include and be based on information from the recipient's employees, governing body members, the private bar, and other interested persons. The appraisal should address the need for outreach, training of the recipient's employees, and support services.

(c) The following factors shall be among those considered by the recipient in establishing priorities:

- (1) The suggested priorities promulgated by the Legal Services Corporation;
- (2) The appraisal described in paragraph (b) of this section;
- (3) The population of eligible clients in the geographic areas served by the recipient, including all significant seg-

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ments of that population with special legal problems or special difficulties of access to legal services;

- (4) The resources of the recipient;
- (5) The availability of another source of free or low-cost legal assistance in a particular category of cases or matters;
- (6) The availability of other sources of training, support, and outreach services;
- (7) The relative importance of particular legal problems to the individual clients of the recipient;
- (8) The susceptibility of particular problems to solution through legal processes;
- (9) Whether legal efforts by the recipient will complement other efforts to solve particular problems in the area served;
- (10) Whether legal efforts will result in efficient and economic delivery of legal services; and
- (11) Whether there is a need to establish different priorities in different parts of the recipient's service area.

§ 1620.4 Establishing policies and procedures for emergencies.

The governing body of a recipient shall adopt written policies and procedures to guide the recipient in undertaking emergency cases or matters not within the recipient's established priorities. Emergencies include those non-priority cases or matters that require immediate legal action to:

- (a) Secure or preserve the necessities of life,
- (b) Protect against or eliminate a significant risk to the health or safety of the client or immediate family members, or
- (c) Address other significant legal issues that arise because of new and unforeseen circumstances.

§ 1620.5 Annual review.

- (a) Priorities shall be set periodically and shall be reviewed by the governing body of the recipient annually or more frequently if the recipient has accepted a significant number of emergency cases outside of its priorities.
- (b) The following factors should be among those considered in determining whether the recipient's priorities should be changed: