



## TITLE III B: LEGAL ASSISTANCE PROGRAM STANDARDS

**Program Definition & Goal:** To provide accessible legal representation and consultation for older adults of the greatest social and economic need with an emphasize on but not limited to legal issues related to aging, abuse and neglect. Legal assistance consists of legal representation by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar.

**Service Type:** Non-registered Service

**Unit of Service:** 1 hour = 1 hour of service

**Area to be Served:** Santa Clara County

**Service Area Target Population:** All contracts are required to provide services to all persons aged 60 and over.

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

### Scope of Service & Funding

Funding available: \$217,000.00

### Minimum Service Standard:

Units of Service: 4,500 units of service

Unduplicated Persons Served: 1,000

**Required Match:** The minimum cash and in-kind match is 11.11%. Based on the available funding, the below cash amounts include the required match for Title III B Supportive Services.

For additional budgeting requirements read the 2020-2024 Request for Proposal Bidders Guide available on the Sourcewise website: <http://www.mysourcewise.com/area-plan>

### Legal Assistance

#### Program Specific Scope of Service:

1. Provider of county-wide services shall target the delivery of legal services at Sourcewise designated focal points and senior centers, with a priority emphasis on outreach in geographic areas with a high concentration of ethnic minority and low-income elderly. The remaining service effort may be delivered at other approved sites.
2. Provider shall set case priorities for categories of cases for which legal representation will be given to ensure that those in greatest economic (22 CCR § 7125) and social need (22 CCR § 7127) are served. Legal representation shall emphasize the categories of public



benefits, long-term care, housing, alternatives to institutionalization, and elder abuse/neglect.

3. Staff shall be trained and experienced in working with seniors who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion, provide informal counseling, and coordinate community resources and linkages for participants are required.
4. Provider shall present group training and education in areas of: rights, entitlements and benefits to older persons, their families and community representatives at service intake sites.
5. Provider shall ensure service quality and maintain professional standards by:
  - (a) Establishing a system of filing, record keeping, docket control and updating case activities;
  - (b) Providing for the supervision of legal workers by an attorney;
  - (c) Establishing a system of review to evaluate the quality of legal work, determine what pertinent issues have been identified, to assure the timely handling of cases, and to ensure that clients are involved in establishing case objectives and are kept informed of developments in the case.
  - (d) Setting optimum caseloads for legal workers based on their experience and specialization;
  - (e) Providing training for legal workers based on responsibilities and skills; and
  - (f) Ensuring that the confidences of clients are preserved from unauthorized disclosure
  - (g) Provider shall have legal malpractice insurance.
6. Legal services shall be delivered to institutionalized, isolated and homebound elderly.
7. A formal agreement shall be developed with the local state-designated Long-Term Care Ombudsman program that will specify ways in which the two programs will coordinate advocacy efforts.
8. A formal agreement shall be developed with the Health Insurance Counseling & Advocacy Program

Legal assistance provider(s) shall attempt to involve the private bar in legal assistance activities, including groups within the private bar furnishing services to older individuals on a pro bono or reduced fee basis.

9. **Objectives:** The provider is required to demonstrate that each of the following programs areas are successfully completed within the awarded fiscal year from July 1, 2020 – June 30, 2021. Included in the Older American Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

#### Targeting

Service providers must have established methods, other than use of means test, to provide services to all persons aged 60 and over.

Service providers must show intent and methodology to serve the needs of:

- Age 75+

- Low Income (federal poverty)
- Minority
- Living Alone

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

### Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

Staffing & Volunteers goal must describe specifically how many staff and volunteers will be required to support the Older Americans Act program and the kind of task that will be performed by volunteers.

### Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

### Client Input

Service providers must have procedures in place for obtaining the views of the participants of the service being provided, including a written and distributed client grievance procedure.

Describe the process by which regular client input is received and areas that are monitored for quality service.

### Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

Describe the process for collecting voluntary client contributions including (a) how clients will be informed of the opportunity to contribute to the cost of the service, (b) the amount of suggested client contribution and how it was determined and (c) the method used to collect and record client contributions to ensure confidentiality.

### Reporting Requirements:

As a “non-registered” service, programs are required to collect information on name, zip code, and age in order to establish OAA program eligibility. Requirements include reporting estimated enrollment of clients/audience and service units on a quarterly and annual basis. Sourcewise will administer the California State Services Quarterly Aggregate Report CDA 1022 templates upon award.