**Oregon DHS/Aging and People with Disabilities program**

**Community Services and Supports Unit**

**OAA Legal Assistance & Elder Rights Assessment Tool: Years 2024-25**

**Due January 31, 2025. Please submit only to** [SUA.Email@odhs.oregon.gov](mailto:SUA.Email@odhs.oregon.gov).

Provider Agency (AAA):      Date of Assessment:

Contact person at AAA for assessment questions:      Contact phone number:

Name of legal service provider organization:       Number of consecutive years of using this provider:

Name of legal service provider #2, if applicable:       Number of consecutive years of using this provider:

**Part 1: Area Agency Review**

| **Legal Assistance (Title IIIB) Standards** | **Yes** | **No** | **Comments or Requested Description** |
| --- | --- | --- | --- |
| 1. Your current contracted legal assistance provider(s) can provide some level of legal services in ***six (6) or more*** of the following topic areas: income, health care, long-term care, nutrition, housing, utilities, protective services, defense of guardianship, abuse, neglect, and age discrimination. ***Please comment*** on your satisfaction with your current provider(s). |  |  |  |
| 1. The AAA’s contract with the legal assistance provider(s) includes agreement that services provided are to comply with the requirements of the OAA **and** Oregon’s 2018 legal assistance program standards. |  |  |  |
| 1. The AAA or its legal service provider attempts to involve, or refer cases to, private attorneys in legal assistance activities authorized under the OAA, including services on a pro bono or reduced fee basis. ***Comment***: If not, what are the barriers? |  |  |  |
| 1. The AAA provides funding for its legal assistance program at or above 3% of Title III-B funding. ***Comment***: What is the current percentage level (%) of III-B funding? |  |  |  |
| 1. The AAA monitors its legal assistance provider(s) at least annually to assess compliance with contractual requirements. |  |  |  |
| 1. The AAA’s terms of agreement with its contracted legal assistance provider(s) include(s) a plan to reach target populations and address priority needs as specified in the OAA. |  |  |  |
| 1. The AAA reviews and revises service targeting plans at least every two years in coordination with its legal assistance provider(s). |  |  |  |
| 1. Does the AAA timely expend all of its legal assistance III-B budget? ***Comment*** on plans to use unspent and carried-forward amounts, if any. |  |  |  |
| 1. The AAA assures that its legal assistance provider(s) set(s) no income requirement for clients to receive III-B legal assistance. |  |  |  |
| 1. Do both the AAA and the legal assistance provider(s) have a client grievance system in place? |  |  |  |

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| --- | --- | --- | --- |
| **Vulnerable Elder Rights Protection (Title VII) Activities** | **Yes** | **No** | **Please identify if activities are provided by the AAA, a contracted legal services provider, or both.** |
| For questions 11 to 15, does the AAA use OAA Title VII funding for one or more of the following elder rights protection activities? |  |  |  |
| 1. Public education or outreach to prevent elder abuse or promote elder abuse reporting. |  |  |  |
| 1. Public education or outreach to promote elder financial literacy and/or prevent elder financial exploitation or fraud. |  |  |  |
| 1. Provide access to information about how elders can obtain legal services for protection of rights. |  |  |  |
| 1. Provide information on how elders may access transport to obtain legal services, as may be needed in the PSA. |  |  |  |
| 1. Provide information and referrals to shelter(s) or safe haven(s) for victims or potential victims of elder abuse. |  |  |  |
| 1. Does the AAA timely expend all of its elder rights Title VII budget? ***Comment*** on plans to use unspent and carried-forward amounts, if any. |  |  |  |
| **Informational** | **Comments** | | |
| 1. Other than the funding level, what are the AAA’s top unmet needs or challenges associated with the provision of OAA legal services and elder rights promotion? |  | | |
| 1. How has the Covid-19 pandemic in Oregon impacted the number of clients and type (demographics) of clients served by your contracted lawyers, and how has the amount of your budget being spent on legal assistance been affected? |  | | |
| 1. How has the AAA or legal assistance provider conducted informational outreach to persons living in rural areas, on tribal reservations, and to persons whose first language is not English to raise awareness of legal assistance programs among more vulnerable consumers? |  | | |

**Part 2: Service Reporting**

| **Question** | **Comments** |
| --- | --- |
| 1. What challenges, if any, are you having with service reporting from your provider? |  |
| 1. What legal service do you wish your provider could do more of for local seniors, and why? |  |

**Part 3: Successes/Best Practices and Plans to Address Any Identified Gaps**

1. Please note any successful strategies, tools, or best practices that the AAA feels are worth celebrating and can be shared with other AAAs.

1. Please identify any areas where your AAA or program partners are not fully meeting the standards, need assistance to meet the standards, or need to take further steps to reach a program goal.

| **Identify the question number (e.g. #1 - 15)** | **Proposed plan or steps the AAA will take.** | **Responsible person** | **Goal date for completion** |
| --- | --- | --- | --- |
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