

**ATTACHMENT I
LEGAL ASSISTANCE SERVICES
PART TWO-PROGRAM DESIGN**

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**PROGRAM MODEL/SCOPE OF WORK
OLDER AMERICANS ACT
REQUEST FOR PROPOSAL 2015-17**

I. Program Overview

The Legal Assistance Program provides seniors (age 60+) with legal assistance and advice as requested by participants. Types of issues addressed by the program include restraining orders, eviction, Social Security, Medi-Cal and Medicare, housing, wills, durable power of attorney, consumer fraud, elder abuse, and real estate matters.

II. Regional Distribution Guideline for Funding and Service Unit Requirements

Please Note The interest of the RFP is for provision of county-wide services

For the purposes of planning, the percentages shown below can be used as a guideline to estimate the amount of funding and the service unit levels to include for each region(s) you are proposing to serve. For example, if proposing for the Central Region only, the guideline amount of funding would be approximately 46% of the total funding available (Section III below) and 46% of the Units of Service, County-Wide Target expected (Section IV below).

If interested in requesting more than the guideline amounts shown, please explain the reason for the request.

Region	% of Total Seniors in Sonoma County 60 Years of Age and Above Living in Each Region (Total # of Seniors in Sonoma County = 101,208)
Central	46%
Coastal	4%
North	12%
Sonoma Valley	12%
South	15%
West	11%

III. Estimated Funding

**ATTACHMENT I
LEGAL ASSISTANCE SERVICES
PART TWO-PROGRAM DESIGN**

Estimated 2015-16 funding through Title IIIB of the Older Americans Act (OAA) to provide Legal Assistance services to all regions of Sonoma County is **\$48,000.**

**ATTACHMENT I
LEGAL ASSISTANCE SERVICES
PART TWO-PROGRAM DESIGN**

IV. Units of Service Requirements for Legal Assistance Program

Service Unit	California Department of Aging Definition	County-Wide Target
1 Hour	Legal advice, counseling and/or representation by an attorney or other person acting under the supervision of an attorney.	2100 Hours

V. Program Requirements

Along with addressing each point listed in Part Four – Instructions for Proposal Preparation; Section III(D)-Proposal Narrative items 1-5 (page 9-11), proposal must demonstrate the proposer’s ability to:

- A. Provide county-wide services.
- B. Describe the legal service assistance program (e.g. a legal service corporation grantee, non-profit agency, or private lawyer). Describe:
 - 1. How the intake process works and who conducts the interview.
 - 2. Describe the specific techniques to be used to make potential clients aware of the legal assistance that will be provided. (CCR Title 22 § 7577(b)).
 - 3. How homebound clients will be reached.
 - 4. The method by which the proposer decides which cases to accept and which to reject.
 - 5. The circumstances when clients are referred to pro-bono or reduced fee assistance.
 - 6. Provide the number of seniors and hours of legal services your agency will be able to serve with this funding.
- C. Comply with California Code of Regulation, Title 22, Division 1.8, Chapter 4, Article 4 found on Attachment L – On-Line Resources #3-Title 22, and the California Statewide Guidelines for Legal Assistance, Refer to Attachment P.
- D. Provide direct representation of older individuals in legal matters. (CCR Title 22 § 7577(a)).
- E. Services must be provided by attorneys that are licensed and in good standing to practice law in the State of California. Legal assistance may be provided by law students or paralegals only under the direct and regular supervision of a licensed attorney. (CCR Title 22 § 7577(c)).
 - 1. Advise whether the persons providing the services will be full time or part time.

**ATTACHMENT I
LEGAL ASSISTANCE SERVICES
PART TWO-PROGRAM DESIGN**

2. Discuss the method by which non-attorneys are supervised by licensed attorney, is the supervising attorney available on a regular or as-needed basis?
 3. Describe the circumstances when the non-attorney provides assistance to clients without first discussing the issue with the supervising attorney.
- F. Provide priority to low-income seniors 60 years of age or older, to those with greatest social need, and to eligible minorities who have threats of financial or housing security.
- G. Provide services Monday-Friday, at least 6 hours a day.
- H. Interview persons by telephone, on a walk-in basis, or by appointment. Telephone and home visit appointments must be made to seniors who are unable to leave their home or do not have access to transportation.
- I. Describe the process of completing an intake and assessment of requested services.
- J. Refer seniors not able to be served due to resource limitations (financial or staffing, geographic location, and/or subject matter) to an appropriate agency. Describe which agencies will be used for referral.
- K. Conduct follow-up on outside referrals to confirm senior received service.
- L. Establish and maintain formal memoranda of understanding (MOU) agreeing to provide legal consultation with the Sonoma County Ombudsman, Adult Protective Services, and the local agency holding the contract for the Health Insurance Counseling and Advocacy Program (HICAP).
- M. Assure quality control through compliance with the "Standards for Providers of Legal Services to the Poor."
- N. Provide proof of malpractice insurance for the contract period.
- O. Prevent disclosure of any information about the participant without written consent of the individual.
- P. 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. (CFR Title 22 § 7579(b)).
- Q. Report suspected abuse, neglect, or exploitation of program participants to Sonoma County Adult Protective Services and/or law enforcement.
- R. Offer services free of charge. However, if requesting a fee, must comply with Fee Generating Case regulations defined in 45 CFR §1321.71(g)(1).
- S. Provide each senior with the opportunity to voluntarily contribute to the cost of the service by developing a suggested contribution schedule.
1. Protect the privacy of each senior with respect to contribution made.
 2. Establish procedures to safeguard and account for all contributions.

**ATTACHMENT I
LEGAL ASSISTANCE SERVICES
PART TWO-PROGRAM DESIGN**

- T. Comply with program standards, service priorities, and responsibilities consistent with statewide standards as they are released or identified by AAA or state licensing body.

VI. Reporting Requirements

Proposals must show the proposer's ability to:

- A. Provide timely, complete, accurate, and verifiable reports.
- B. Report activities to the AAA on a monthly basis, utilizing the software or forms supplied by the AAA. Software includes using the SAMS/Harmony data collection application to comply with California Department of Aging (CDA) non-registered services requirements.
- C. Submit program performance reports in accordance with AAA requirements.