



**DELAWARE HEALTH AND  
SOCIAL SERVICES**

Division of Services for Aging and  
Adults with Physical Disabilities

**Legal Services for the Elderly  
Service Specifications**

**Revision Table**

<b>Revision Date</b>	<b>Sections Revised</b>	<b>Description</b>
1/8/2014		Original for 2014 RFP
11/24/15	3.0 & 8.0	Added: 3.0, 3.1 & 8.2
5/18/16	5.0	Amended 5.2.1.4
7/3/2017	8.3	Added entire section
7/27/2017	8.3	Deleted: <i>Service Units – The Provider must supply supporting documentation for the <u>service units charged</u> for the selected month of the Invoice Review. These records must indicate: <u>Service Units provided including the dates and time of service.</u></i>
8/15/2017	5.2	Amended 5.2.1.4
7/11/2018	5.2 & 8.2	Amended 5.2, 8.2
7/16/2018	Attachment	Added Attachment A
7/16/2018	8.3	Deleted Section
8/08/2018	6.0	Amended 6.8, 6.9. Added 6.12



**DELAWARE HEALTH AND  
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**Legal Services for the Elderly  
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**1.0 SERVICE DEFINITION**

- 1.1 Legal advice and representation in civil matters, including consultation, negotiation, and preparation of legal documents. Conducting community education presentations on legal issues related to the elderly.
- 1.2 Please note – due to the fact that the Division of Services for Aging & Adults with Physical Disabilities is procuring the Legal Services for our target population of persons sixty (60) years of age and older, and not the State, the following law does not apply for this service – (Title 29 *Del. C.* § 2507 prohibits the retainer of attorneys to provide legal services to the State and its agencies without the consent of the Governor and the Attorney General.)

**2.0 SERVICE GOAL**

- 2.1 To provide access to the legal system for the persons sixty (60) years of age or older.

**3.0 SERVICE UNIT**

- 3.1 The unit of service is one (1) hour of service as defined in 1.1 of the Service Definition.

**4.0 SERVICE AREA**

- 4.1 Legal services are available to all eligible residents of the State of Delaware.
- 4.2 Providers of legal services must provide statewide service coverage.

**5.0 ELIGIBILITY**

- 5.1 Services are available to all Delaware residents who are 60 years of age and over
- 5.2 Priority
  - 5.2.1 Priority will be given to those participants who are:
    - 5.2.1.1 Older individuals with the greatest social or economic need, as defined in the Older Americans Act, with particular emphasis on:
      - 5.2.1.1.1 Older individuals with low-incomes
      - 5.2.1.1.2 Old individuals who are minorities
      - 5.2.1.1.3 Older individuals who identify as LGBTQ
      - 5.2.1.1.4 Older individuals with limited English proficiency
      - 5.2.1.1.5 Older individuals living in rural areas.
    - 5.2.1.2 Legal assistance shall only be provided in matters related to:
      - Public Benefits: Legal assistance for older persons to access public benefits (including SS/SSI/SSDI, Medicaid and Medicare, veterans benefits and unemployment compensation)
      - Advanced Directives: Legal assistance for older persons to draft advance directives and designate surrogate decision makers who will effectuate their wishes if they become incapacitated



**DELAWARE HEALTH AND  
SOCIAL SERVICES**

Division of Services for Aging and  
Adults with Physical Disabilities

**Legal Services for the Elderly  
Service Specifications**

- Guardianship: Legal assistance on issues related to guardianship with a focus on representation for older persons who are the subject of guardianship actions
- Housing: Legal assistance for older persons to access available housing options, including low income housing programs that allow them to stay independent in their homes and communities
- Foreclosure and Eviction: Legal assistance for older persons facing foreclosure or eviction proceedings that jeopardize their ability to stay independent in their homes and communities
- LTC Private Financing: Legal assistance for older persons to gain access to the full benefit of appropriate long-term care (LTC) private financing options
- Financial: Legal assistance for older persons to maintain their long term financial solvency and economic security
- LTC Transition: Legal assistance to ensure elder rights protections for older persons transferring from long-term care (LTC) facilities to home and community-based care
- Elder Abuse, Fraud, and Exploitation: Legal assistance for older persons who have experienced elder abuse, including consumer fraud and the financial exploitation of older persons

**6.0 SERVICE STANDARDS**

- 6.1 Services must be provided by an attorney, or a paralegal under the supervision of an attorney, who has the ability to relate to older individuals and their legal issues
- 6.2 At a minimum, there shall be one full-time attorney who is a member in good standing of the Delaware Bar staffing the project
- 6.3 Service must be provided and administered according to the provisions of the Delaware Lawyers' Rules of Professional Conduct.
- 6.4 Services must be in compliance with all federal, state, and local laws, rules, regulations, and policies.
- 6.5 Services shall be provided in an office which is as free from architectural and psychological barriers as possible, and which provides adequate space and privacy.
- 6.6 Legal services may also be provided in any other location (such as senior centers, nursing homes, hospitals, or private residences) which the participant's situation shall render necessary or practical.
- 6.7 In view of the confidential nature of the services, care should be taken in delivery of services outside the office. Delivery should take place in as private an area as possible.
- 6.8 The provider must conduct outreach to ensure that eligible participants are aware of services and have access to them. At least two outreach events per quarter should be conducted.



**DELAWARE HEALTH AND  
SOCIAL SERVICES**

Division of Services for Aging and  
Adults with Physical Disabilities

**Legal Services for the Elderly  
Service Specifications**

- 6.9 Where appropriate, the provider must conduct at least one legal education program for eligible participants, or for providers of services to eligible participants, each quarter of the contract year.
- 6.10 The provider shall be subject to restrictions and regulations promulgated under the Legal Services Corporation Act (other than restrictions and regulations governing eligibility for legal assistance under such Act and governing membership of local governing boards) as determined appropriate by the Assistant Secretary for Aging.
- 6.11 If the provider is not a Legal Services Corporation (LSC) program grantee, it shall coordinate with existing LSC programs in targeting services to older individuals with social or economic need.
- 6.12 When the Legal Services for the Elderly program or services are publicized, provider will identify the Division of Services for Aging and Adults with Physical Disabilities as the support agency. The provider must also state that primary funding is provided by Title III-B of the Older Americans Act.
- 6.13 **Allowable Services**
- 6.13.1 Provide legal advice and representation to eligible participants, including but not limited to, the following:
- 6.13.1.1 Assess the participant's case and possible approaches to its resolution.
  - 6.13.1.2 Present the assessment to the participant in clear and understandable language to provide a basis for an informed decision.
  - 6.13.1.3 Advise the participant of any steps he/she should take to further his/her case, at all stages of representation.
  - 6.13.1.4 Identify additional information needed and, if necessary gather information on behalf of the participant.
  - 6.13.1.5 Conduct investigations and legal research necessary to prepare the participant's case.
  - 6.13.1.6 Prepare legal documents for the participant.
  - 6.13.1.7 Initiate legal actions on behalf of the participant.
  - 6.13.1.8 Initiate administrative decision appeals on behalf of the participant.
  - 6.13.1.9 Negotiate on behalf of the participant.
  - 6.13.1.10 Represent the participant in court.
  - 6.13.1.11 Represent the participant in administrative hearings.
  - 6.13.1.12 Review case outcomes to determine whether appeals are appropriate.
  - 6.13.1.13 Review the case with the participant to ensure he/she understands the outcome and its implications.
- 6.13.2 Coordinate with the Office of Long-Term Care Ombudsman regarding referral procedures, training of the staff of the Ombudsman program and service delivery as appropriate.



**DELAWARE HEALTH AND  
SOCIAL SERVICES**

Division of Services for Aging and  
Adults with Physical Disabilities

**Legal Services for the Elderly  
Service Specifications**

6.13.3 Work with the private bar to provide them with the necessary training and technical assistance to develop programs which provide legal services to the elderly.

**6.14 Prohibited services**

6.14.1 Providing legal services to a person under sixty (60) years of age.

6.14.2 Providing legal advice and representation in criminal proceedings.

**7.0 CLOSING INTAKE**

7.1 When the demand for a service exceeds the ability to provide the service, the provider may close its intake process until such time that additional participants can be offered legal services. The provider will report the number of potential participants who request service while intake is closed.

**8.0 INVOICING REQUIREMENTS**

8.1 The provider will invoice DSAAPD for reimbursement utilizing the invoicing workbook provided, pursuant to the DSAAPD Policy Manual for Contracts, policy X-Q, Invoicing.

8.2 The provider will submit quarterly program reports, using the form provided by DSAAPD (Attachment A), by the 15<sup>th</sup> day after each quarter.

**9.0 PROGRAM INCOME**

9.1 Participants, family members, and/or caregivers must be informed of the cost of providing services and must be offered the opportunity to make voluntary contributions to help defray the cost, thereby making additional services available to others.

9.2 Providers must:

9.2.1 Inform applicants, family members and/or caregivers of the cost of providing services and offer them the opportunity to make voluntary contributions.

9.2.2 Protect their privacy with respect to his/her contribution

9.2.3 Safeguard and account for all donations

9.2.4 Use the contributions to expand services



**DELAWARE HEALTH AND SOCIAL SERVICES**

Division of Services for Aging and Adults with Physical Disabilities

**Legal Services for the Elderly Service Specifications**

**Attachment A**

**A. Participant Information**

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	Total
<b>TOTAL SERVED</b>					
<b>Number of unduplicated persons (60+) served under Title III</b>					
<b>Age</b>					
60-65					
66-70					
71-75					
76-80					
81-85					
86 +					
Age missing					
<b>Gender</b>					
Female					
Male					
Other					
Gender missing					
<b>Geographic location</b>					
Urban					
Rural					
Geographic Location missing					
<b>LGBTQ</b>					
LGBTQ					
Not LGBTQ					
LGBTQ missing					
<b>Ethnicity</b>					
Hispanic or Latino					
Not Hispanic or Latino					
Ethnicity missing					



**DELAWARE HEALTH AND  
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Adults with Physical Disabilities

**Legal Services for the Elderly  
Service Specifications**

<b>Race</b>					
American Indian or Alaskan Native					
Asian or Asian American					
Black or African American					
Native Hawaiian or other Pacific Islander					
White					
Race missing					
<b>English Proficiency</b>					
Speaks English					
Speaks other Language					
English Proficiency missing					
<b>Poverty Status</b>					
Below Poverty					
Above Poverty					
Poverty Status missing					
<b>Military Status</b>					
Served in the military					
Has not served in the military					
Military Status missing					
<b>Referral Source</b>					
Self					
Nursing Home					
Senior Center					
Hospital					
CLASI Offices					
DSAAPD Staff/ADRC					
Community Organization or Non-DSAAPD Agency					
Other					
Referral Source missing					



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**B. Case Information**

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	Total
<b>TOTAL</b>					
<b>Number of Cases Opened</b>					
<b>Case Types</b>					
Public Benefits					
Advanced Directives					
Guardianship					
Housing					
Foreclosure and Eviction					
LTC Private Financing					
Financial					
LTC Transition					
Elder Abuse, Fraud, and Exploitation					
<b>Referrals to Private Attorneys</b>					
<b>Referrals to Non-Legal Services</b>					

**Brief Narrative on Case Trends for the Quarter:**

**C. Outreach Information**

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	Total
<b>TOTAL</b>					





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<b>Number of Community Presentations</b>					
<b>Number of Trainings Held for Private Bar</b>					