

Kentucky Model Approaches to Legal  
Service Development  
Legal Delivery Systems Assessment  
December 11, 2008

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## Acknowledgements

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## Executive Summary

The purpose of this study was to examine the established system that delivers legal services to persons age 60 and over in Kentucky. The study collected and analyzed data from the Area Agencies on Aging, the regional legal service programs that deliver services funded under Title III-B of the Older Americans Act and the Legal HelpLine for Older Kentuckians.

The Study shows that integrating services from the Title III-B providers and the Legal HelpLine results in a significant improvement in the volume of services delivered from 3571 to 4632 and in increase in reaching rural and isolated reducing the number of counties reached with legal assistance to seniors to 117 from 114 out of 120 total counties in the state. All Area Agencies on Aging have contracts with the local regional legal services provider to provide legal assistance under Title III-B covering all 120 counties in the Kentucky. The data indicates that the services provided under older Americans Act funding appear to be reaching Older Americans Act Targeted populations.

All respondents agreed that there is insufficient funding to meet the demand for legal assistance by targeting populations. All providers report providing services in excess of the funding made available.

The top 10 legal issues that services are provided for are:

Rank	Problem Code	legal issues	number of cases
1	95	estate planning, probate, LW, POA	947
2	51	Medicaid	627
3	2	Collection	457
4	52	Medicare	401
5	96	Advance Directives	400
6	32	Divorce	188
7	99	Other misc	162
8	62	private landlord tenant	152
9	63	public housing	141
10	33	Guardianship	111

This report marks the completion of an essential next step in developing improved access to legal assistance by older Kentuckians and should serve as a centerpiece for strategic planning. The value of this study is in using the data in this study and in the “Study of the Concerns of Older Kentuckians” published in November of 2007 to engage

all constituents in meaningful dialog aimed at leveraging limited resources to provide the highest levels of assistance to those in the greatest need.

The study revealed a lack of a uniform reporting definition for a unit of service under III-B funding making data based on units of service unreliable for comparison. This is an issue that should be addressed.

## Purpose of the Study

The purpose of this study is to provide baseline data on the Kentucky legal service delivery system. Coupled with the existing study of the legal needs of older Kentuckians, the information will be used to engage in strategic planning to improve access to legal assistance by persons age 60 and older in Kentucky. This study of the legal service delivery system in Kentucky shows a snapshot of the capacity and experience of the system in delivering services to clients age 60 and over. The data from this study provides a profile of the kinds of legal assistance being provided by the legal service delivery system in Kentucky; a detailed examination of the kind of legal issues that clients are being helped with; the level of services being provided; and detailed geographic information about the services being delivered. The data from the study provides information about the legal service delivery system from the point of view of the Area Agencies on Aging and Independent Living and the legal service providers. The study will reveal best practices for replication, points of concern for possible improvement and suggested topics for further study and discussion.

## Methodology and Limitations

Data for this study was collected using survey documents and case service reports. Two survey instruments were created: one for Area Agencies on Aging, focusing on collecting data about their experience with legal assistance providers with a focus on Older Americans Act Title III-B providers, and a second for the four regional legal services providers documenting their experiences in providing services under Older Americans Act Title III-B funding and their experience working with the local and regional Area Agencies on Aging. The survey instruments were distributed by email to the Executive Directors of the legal service providers and the directors of the Area Agencies on Aging. Follow-up was done with the legal service programs to urge the timely return of the surveys and reports. The provider surveys were completed and returned over approximately a four month period of time between June and October 2008. The Legal Services Providers were asked to provide detailed reports on the number of legal assistance provided in each county by Legal Service Corporation problem code. Data was collected and compiled from a computer database used to collect data on client services. The data was then consolidated into a series of reports that form the basis for this narrative report and some of the appendixes. The survey instruments were distributed to the identified contact persons at all AAA's. Follow up to solicit timely return of the surveys was done by the program manager at the Department for Aging and Independent Living. Surveys were collected over a four month period of time starting in June of 2008 and ending in October 2008.

This study is limited by a several factors. The legal services providers voluntarily reported data and completed the survey. Though all legal services providers completed the survey and submitted case service data, we had no ability to compel participation or to audit or verify the completeness or accuracy of the data submitted. The case service data was submitted in different formats by each of the program but appears to be

collected with a uniform set of data points. It is believed that the data as compiled represents an accurate picture of the service delivered, but may contain some minor discrepancies caused by the formatting differences. Case service data was requested for a “recent 12 month period.” The actual time period was left flexible to encourage submission of data, but the 12 month periods for data may vary slightly for the four providers, and most reports did not include specific dates for the data. The time periods are reasonable close with no major impacts on service demand in the overall time frame, so the data should fairly reflect the service supply in a typical recent 12 month period, but cannot specify a specific time frame. At the recommendation of the research advisor at the Department for Aging and Independent Living, the legal service provider survey promised to report summaries only of data in certain categories to encourage provider participation and disclosure. The underlying data does contain more detail than the final report and summaries. In selected situations, program and AAA names have been redacted and replaced with XXX to protect the identity of the participating providers, which could have a minimal but unavoidable impact on the final report and summaries. Finally, there were some unanswered questions on returned surveys.

Data was collected from the fifteen regional Area Agencies on Aging using a survey instrument. The surveys were emailed to contact persons in all AAAs. Data was returned in a variety of formats, including some hand-written, which created some minor difficulty in reading. Data was requested and reported regarding units of service; however, the provider surveys revealed a lack of a uniform definition of a unit of service (it varied from .5 hours or 1 hour,). As a result, the units of service data is unreliable and will not be included in the narrative.

An attempt was made to collect information on legal service providers outside the traditional legal services providers. Very limited data was collected on this topic. A search of other research in this field revealed no “best practices” for collecting data on providers outside the normal service network.

A report was compiled of services provided by the Legal HelpLine for Older Kentuckians between October 1, 2007 and September 30, 2008. The primary service for the HelpLine is counsel and advice to Older Kentuckians, while many of the III-B services are extended representation. The data reflects total cases closed, but the time required for each case can vary widely.

## Overview of the Kentucky Legal Services Delivery System

Legal services to the poor, elderly and at-risk populations are provided by four regional civil legal aid programs, their local pro bono programs and a stand-alone statewide legal hotline housed at the Access to Justice Foundation. All programs have developed pro bono referral systems and there is a statewide pro bono recruitment program hosted by the Access to Justice Foundation. Here is a brief description of the components of the legal service delivery system in Kentucky.

The four regional legal services programs:

- 1) Legal Aid of the Bluegrass (LAB) serves northern, north central and northeast Kentucky, covering Covington to Lexington and east, along the I-64 Corridor to Ashland. LAB is the result of the merger of Northern Kentucky Legal Aid, Central Kentucky Legal Services and Northeast Kentucky Legal Services over the course of the past 11 years. The program(s) have been providing services in the region for over 30 years. LAB is a full-service civil legal aid program providing legal assistance without charge to low-income clients. The program focuses primarily in family law, domestic violence, consumer law, debtor/creditor issues, public benefits and housing. The program receives funding from multiple sources including Legal Service Corporation, file fee, state general appropriation, United Way, State Health Insurance Information and Assistance program (SHIP), and Older American's Act Title III-B.
- 2) Legal Aid Society (LAS) has provided services in Louisville and the surrounding counties for over 50 years. LAS is a full service civil legal aid program. The program staff specializes in selected areas of the law and cases are assigned based on the case load of staff with expertise in a given area of the law. The program focuses primarily on family law, domestic violence, consumer law, debtor/ creditor issues, public benefits and housing. The program is host to a new initiative funded by caregiver support funding from the local area on aging to provide special assistance to grandparents and family caregivers of children. The program receives funding from multiple sources including Legal Service Corporation, file fee, state general appropriation, United Way, State Health Insurance Information and Assistance program (SHIP), long term care ombudsman and Older American's Act Title III-B.
- 3) Appalachian Research and Defense Fund (ARDF), provides civil legal aid in eastern and south central Kentucky, including the Appalachian mountain region and many of the poorest counties of the state, with a couple of those counties ranking among the poorest in the country. Services are provided by small local offices throughout the region. The service population is very poor, rural and dispersed. The local offices have small staffs with widely varying areas of expertise. The programs focuses primarily on issues of rural poverty including family law, domestic violence, debt collections, mortgage foreclosure, defective mobile homes, defective home repairs, SSI and disability law, public benefits and unemployment. The program receives funding from Legal Service Corporation, file fee, state general appropriation, United Way, State Health Insurance Information and Assistance program (SHIP), long term care ombudsman, IRS taxpayer assistance program,

a special foreclosure prevention project and Older American's Act Title III-B among others.

- 4) Kentucky Legal Aid (KLA) provides civil legal aid services in a large geographic area of western Kentucky. KLA has a very well developed central intake and assistance program. All new cases and new clients are screened for service eligibility by a specialized team in a central location. Using a hotline format, advice is offered to all eligible clients and appointments for additional services with advocates in the regional offices are made directly by the intake staff, using a live online calendaring and instant electronic communications system. The service area is primarily rural, dominated by rolling farmland and with isolated manufacturing. KLA's services focus primarily on family law, domestic violence, public benefits and health care law (including Medicare and Medicaid.) The program receives funding from Legal Service Corporation, file fee, state general appropriation, United Way, State Health Insurance Information and Assistance program (SHIP), long term care ombudsman and Older American's Act Title III-B among others.
  
- 5) The Access to Justice Foundation Legal HelpLine for Older Kentuckians provides a statewide toll-free hotline offering legal advice, information and referral services. This program has been in operation since 1999 and has assisted over 18,000 clients. The focus of the HelpLine is clients age 60 and over. Legal issues focus primarily on access to health care, including Medicare and Medicaid, powers of attorney, elder abuse, guardianship and estate and probate issues. Calls are accepted from all 120 counties in the state and advice and assistance are provided by experienced attorneys. If the client requires services beyond the scope of the service capacity of the HelpLine, clients are referred to the intake offices of their local legal aid program (III-B providers.), and selected cases are referred directly to pro-bono attorneys with specialized knowledge of the issues of law and aging. The HelpLine has no dedicated funding. It is kept in service by the Model Approaches to Statewide Legal Service Development project, and the staff of the Access to Justice Foundation by state general appropriation funding and funding for special projects from a variety of other sources.
  
- 6) Pro Bono Initiatives:  
All of the programs operate pro-bono programs using Legal Service Corporation Private Attorney Involvement funding set asides. The pro-bono programs vary in capacity and success. A statewide effort to recruit additional pro-bono attorneys is being coordinated by the Access to Justice Foundation's Volunteer Lawyer Program.

Specialized training is being used to recruit attorneys to accept pro-bono referrals in a wider spectrum of cases.

### Service Delivery provider reports

A survey instrument was distributed to the four regional legal services providers asking about their experience in providing legal services funded under Title III-B of the Older Americans Act and their experience working with the local Area Agencies on Aging. This section contains a summary of the data collected in those reports.

All four of the regional legal service providers report having contracts with their local area agencies on aging to provide services under Title III-B of the Older American’s act. Legal services providers reported III-B services in 114 out of 120 Kentucky counties in a 12 month reporting period. The six counties with no reported III-B services are Jackson, Lee, Leslie, Monroe, Nicholas, Owsely and Wofle. When we include services provided by the Legal HelpLine for Older Kentuckians, the number of counties with no reported services drops to only three, Leslie, Monroe and Wolfe.

#### Total Services By County III-B Providers Only

County	Population from 2000	LAB	KLA	LAS	ARDF	Total Services to County
<a href="#">Adair</a>	17,244				19	19
<a href="#">Allen</a>	17,800		10			10
<a href="#">Anderson</a>	19,111	30				30
<a href="#">Ballard</a>	8,286		6			6
<a href="#">Barren</a>	38,033		30			30
<a href="#">Bath</a>	11,085	12				12
<a href="#">Bell</a>	30,060				8	8
<a href="#">Boone</a>	85,991	89				89
<a href="#">Bourbon</a>	19,360	31				31
<a href="#">Boyd</a>	49,752	42				42
<a href="#">Boyle</a>	27,697	11				11
<a href="#">Bracken</a>	8,279	11				11
<a href="#">Breathitt</a>	16,100				1	1
<a href="#">Breckinridge</a>	18,648			6		6
<a href="#">Butler</a>			9			
<a href="#">Bullitt</a>	61,236			15		15
<a href="#">Butler</a>	13,010		9			9
<a href="#">Caldwell</a>	13,060		38			38
<a href="#">Calloway</a>	34,177		18			18
<a href="#">Campbell</a>	88,616	114				114
<a href="#">Carlisle</a>	5,351		2			2
<a href="#">Carroll</a>	10,155	3				3

<a href="#">Carter</a>	26,889	27				27
<a href="#">Casey</a>	15,447			1	11	12
<a href="#">Christian</a>	72,265		44			44
<a href="#">Clark</a>	33,144	13		1		14
<a href="#">Clay</a>	24,556				3	3
<a href="#">Clinton</a>	9,634				8	8
<a href="#">Crittenden</a>	9,384	1	37			38
<a href="#">Cumberland</a>	7,147			1	3	4
<a href="#">Daviess</a>	91,545		174			174
<a href="#">Edmonson</a>	11,644		8			8
<a href="#">Elliott</a>	6,748	1				1
<a href="#">Estill</a>	15,307	16				16
<a href="#">Fayette</a>	260,512	219		1	1	221
<a href="#">Fleming</a>	13,792	17				17
<a href="#">Floyd</a>	42,441			2	27	29
<a href="#">Franklin</a>	47,687	51		3		54
<a href="#">Fulton</a>	7,752		2			2
<a href="#">Gallatin</a>	7,870	5				5
<a href="#">Garrard</a>	14,792	6				6
<a href="#">Grant</a>	22,384	12				12
<a href="#">Graves</a>	37,028		21			21
<a href="#">Grayson</a>	24,053			4		4
<a href="#">Green</a>	11,518				1	1
<a href="#">Greenup</a>	36,891	23				23
<a href="#">Hancock</a>	8,392		8			8
<a href="#">Hardin</a>	94,174			25		25
<a href="#">Harlan</a>	33,202				13	13
<a href="#">Harrison</a>	17,983	10		1		11
<a href="#">Hart</a>	17,445		5			5
<a href="#">Henderson</a>	44,829		34			34
<a href="#">Henry</a>	15,060			3		3
<a href="#">Hickman</a>	5,262		2			2
<a href="#">Hopkins</a>	46,519		138			138
<a href="#">Jackson</a>	13,495					
<a href="#">Jefferson</a>	693,604	1		714		715
<a href="#">Jessamine</a>	39,041	74				74
<a href="#">Johnson</a>	23,445				10	10
<a href="#">Kenton</a>	151,464	170				170
<a href="#">Knott</a>	17,649				3	3
<a href="#">Knox</a>	31,795				16	16
<a href="#">Larue</a>	13,373			1		1
<a href="#">Laurel</a>	52,715				9	9
<a href="#">Lawrence</a>	15,569	8				8
<a href="#">Lee</a>	7,916					
<a href="#">Leslie</a>	12,401					
<a href="#">Letcher</a>	25,277	1			11	12
<a href="#">Lewis</a>	14,092	6				6
<a href="#">Lincoln</a>	23,361	29				29

<a href="#">Livingston</a>	9,804				19	19
<a href="#">Logan</a>	26,573				19	19
<a href="#">Lyon</a>	8,080				43	43
<a href="#">McCracken</a>	65,514				95	95
<a href="#">McCreary</a>	17,080					7
<a href="#">McLean</a>	9,938				19	19
<a href="#">Madison</a>	70,872	62		1		63
<a href="#">Magoffin</a>	13,332					3
<a href="#">Marion</a>	18,212			3		3
<a href="#">Marshall</a>	30,125		22			22
<a href="#">Martin</a>	12,578					5
<a href="#">Mason</a>	16,800	18				18
<a href="#">Meade</a>	26,349			6		6
<a href="#">Menifee</a>	6,556	4				4
<a href="#">Mercer</a>	20,817	21				21
<a href="#">Metcalfe</a>	10,037		6			6
<a href="#">Monroe</a>	11,756					
<a href="#">Montgomery</a>	22,554	21				21
<a href="#">Morgan</a>	13,948	6				6
<a href="#">Muhlenberg</a>	31,839		64			64
<a href="#">Nelson</a>	37,477			11		11
<a href="#">Nicholas</a>	6,813					
<a href="#">Ohio</a>	22,916		22			22
<a href="#">Oldham</a>	46,178			9		9
<a href="#">Owen</a>	10,547	2				2
<a href="#">Owsley</a>	4,858					
<a href="#">Pendleton</a>	14,390	10				10
<a href="#">Perry</a>	29,390					32
<a href="#">Pike</a>	68,736					34
<a href="#">Powell</a>	13,237	5				5
<a href="#">Pulaski</a>	56,217					72
<a href="#">Robertson</a>	2,266	3				3
<a href="#">Rockcastle</a>	16,582					10
<a href="#">Rowan</a>	22,094	31				31
<a href="#">Russell</a>	16,315					11
<a href="#">Scott</a>	33,061	53				53
<a href="#">Shelby</a>	33,337	1		10		11
<a href="#">Simpson</a>	16,405		10			10
<a href="#">Spencer</a>	11,766			3		3
<a href="#">Taylor</a>	22,927					3
<a href="#">Todd</a>	11,971		6			6
<a href="#">Trigg</a>	12,597		46			46
<a href="#">Trimble</a>	8,125			1		1
<a href="#">Union</a>	15,637		6			6
<a href="#">Warren</a>	92,522		112	2		114
<a href="#">Washington</a>	10,916			3		3
<a href="#">Wayne</a>	19,923					8
<a href="#">Webster</a>	14,120		19			19

<a href="#">Whitley</a>	35,865				11	11
<a href="#">Wolfe</a>	7,065					
<a href="#">Woodford</a>	23208	7				7
out of state and no county		13	1	14	5	33
out of state	4,041,769	1290	1104	841	345	3571

**Total Services by County  
Includes Services by Legal HelpLine for Older Kentuckians**

County	Population from 2000	LAB	KLA	LAS	ARDF	HelpLine	Total Services to County
<a href="#">Adair</a>	17,244				19	4	23
<a href="#">Allen</a>	17,800		10				10
<a href="#">Anderson</a>	19,111	30				3	33
<a href="#">Ballard</a>	8,286		6			2	8
<a href="#">Barren</a>	38,033		30			2	32
<a href="#">Bath</a>	11,085	12				1	13
<a href="#">Bell</a>	30,060				8	8	16
<a href="#">Boone</a>	85,991	89				13	102
<a href="#">Bourbon</a>	19,360	31				5	36
<a href="#">Boyd</a>	49,752	42				17	59
<a href="#">Boyle</a>	27,697	11				18	29
<a href="#">Bracken</a>	8,279	11					11
<a href="#">Breathitt</a>	16,100				1	1	2
<a href="#">Breckinridge</a>	18,648			6		1	7
<a href="#">Bullitt</a>	61,236			15		11	26
<a href="#">Butler</a>	13,010		9			2	11
<a href="#">Caldwell</a>	13,060		38				38
<a href="#">Calloway</a>	34,177		18			9	27
<a href="#">Campbell</a>	88,616	114				22	136
<a href="#">Carlisle</a>	5,351		2				2
<a href="#">Carroll</a>	10,155	3					3
<a href="#">Carter</a>	26,889	27				2	29
<a href="#">Casey</a>	15,447			1	11	3	15
<a href="#">Christian</a>	72,265		44			3	47
<a href="#">Clark</a>	33,144	13		1		21	35
<a href="#">Clay</a>	24,556				3		3
<a href="#">Clinton</a>	9,634				8	1	9
<a href="#">Crittenden</a>	9,384	1	37				38
<a href="#">Cumberland</a>	7,147			1	3		4
<a href="#">Daviess</a>	91,545		174			7	181
<a href="#">Edmonson</a>	11,644		8				8
<a href="#">Elliott</a>	6,748	1					1

<a href="#">Estill</a>	15,307	16				7	23
<a href="#">Fayette</a>	260,512	219		1	1	485	706
<a href="#">Fleming</a>	13,792	17				3	20
<a href="#">Floyd</a>	42,441			2	27	2	31
<a href="#">Franklin</a>	47,687	51		3		24	78
<a href="#">Fulton</a>	7,752		2				2
<a href="#">Gallatin</a>	7,870	5				3	8
<a href="#">Garrard</a>	14,792	6				3	9
<a href="#">Grant</a>	22,384	12				4	16
<a href="#">Graves</a>	37,028		21			3	24
<a href="#">Grayson</a>	24,053			4		7	11
<a href="#">Green</a>	11,518				1	2	3
<a href="#">Greenup</a>	36,891	23				8	31
<a href="#">Hancock</a>	8,392		8				8
<a href="#">Hardin</a>	94,174			25		11	36
<a href="#">Harlan</a>	33,202				13	1	14
<a href="#">Harrison</a>	17,983	10		1		10	21
<a href="#">Hart</a>	17,445		5				5
<a href="#">Henderson</a>	44,829		34			5	39
<a href="#">Henry</a>	15,060			3			3
<a href="#">Hickman</a>	5,262		2				2
<a href="#">Hopkins</a>	46,519		138			1	139
<a href="#">Jackson</a>	13,495					1	1
<a href="#">Jefferson</a>	693,604	1		714		121	836
<a href="#">Jessamine</a>	39,041	74				17	91
<a href="#">Johnson</a>	23,445				10	3	13
<a href="#">Kenton</a>	151,464	170				31	201
<a href="#">Knott</a>	17,649				3	1	4
<a href="#">Knox</a>	31,795				16	3	19
<a href="#">Larue</a>	13,373			1		2	3
<a href="#">Laurel</a>	52,715				9	7	16
<a href="#">Lawrence</a>	15,569	8				3	11
<a href="#">Lee</a>	7,916					2	2
<a href="#">Leslie</a>	12,401						
<a href="#">Letcher</a>	25,277	1			11		12
<a href="#">Lewis</a>	14,092	6				1	7
<a href="#">Lincoln</a>	23,361	29				3	32
<a href="#">Livingston</a>	9,804		19			2	21
<a href="#">Logan</a>	26,573		19			2	21
<a href="#">Lyon</a>	8,080		43			1	44
<a href="#">McCracken</a>	65,514		95			8	103
<a href="#">McCreary</a>	17,080				7	5	12
<a href="#">McLean</a>	9,938		19				19
<a href="#">Madison</a>	70,872	62		1		20	83
<a href="#">Magoffin</a>	13,332				3	1	4
<a href="#">Marion</a>	18,212			3		3	6
<a href="#">Marshall</a>	30,125		22			14	36
<a href="#">Martin</a>	12,578				5	3	8

<a href="#">Mason</a>	16,800	18				2	20
<a href="#">Meade</a>	26,349			6		1	7
<a href="#">Menifee</a>	6,556	4				3	7
<a href="#">Mercer</a>	20,817	21				8	29
<a href="#">Metcalf</a>	10,037		6				6
<a href="#">Monroe</a>	11,756						
<a href="#">Montgomery</a>	22,554	21				14	21
<a href="#">Morgan</a>	13,948	6					6
<a href="#">Muhlenberg</a>	31,839		64			4	68
<a href="#">Nelson</a>	37,477			11		3	14
<a href="#">Nicholas</a>	6,813					2	2
<a href="#">Ohio</a>	22,916		22				22
<a href="#">Oldham</a>	46,178			9		1	10
<a href="#">Owen</a>	10,547	2				2	4
<a href="#">Owsley</a>	4,858					1	1
<a href="#">Pendleton</a>	14,390	10				1	11
<a href="#">Perry</a>	29,390				32	5	37
<a href="#">Pike</a>	68,736				34	8	42
<a href="#">Powell</a>	13,237	5				1	6
<a href="#">Pulaski</a>	56,217				72	11	83
<a href="#">Robertson</a>	2,266	3					3
<a href="#">Rockcastle</a>	16,582				10	4	14
<a href="#">Rowan</a>	22,094	31				1	32
<a href="#">Russell</a>	16,315				11		11
<a href="#">Scott</a>	33,061	53				12	65
<a href="#">Shelby</a>	33,337	1		10		3	14
<a href="#">Simpson</a>	16,405		10				10
<a href="#">Spencer</a>	11,766			3		2	5
<a href="#">Taylor</a>	22,927				3	2	5
<a href="#">Todd</a>	11,971		6				6
<a href="#">Trigg</a>	12,597		46			1	47
<a href="#">Trimble</a>	8,125			1			1
<a href="#">Union</a>	15,637		6			1	7
<a href="#">Warren</a>	92,522		112	2		6	120
<a href="#">Washington</a>	10,916			3		1	4
<a href="#">Wayne</a>	19,923				8	2	10
<a href="#">Webster</a>	14,120		19			1	20
<a href="#">Whitley</a>	35,865				11	8	19
<a href="#">Wolfe</a>	7,065						
<a href="#">Woodford</a>	23208	7				8	15
out of state and no county		13	1	14	5	166	
out of state	4,041,769	0	1095	841	345	1274	4632

Providers report funding from local AAAs ranging from \$5,000 per year to \$125,761 per year (the high number includes significant SHIP and LTC Ombudsmen.)

PADD_____	6,688_____
PEADD_____	16,875_____
GRADD_____	17,361_____
BRADD_____	125,761(INCLUDES SHIP AND OMB)_
BSADD	6,346.00
KRADD	7,176.00
CVADD	7,097.00
LCADD	23,087.00
Buffalo Trace	10,000
FIVCO	8,560
Bluegrass	28,000
Northern KY	26,067
Gateway	5,000
KIPDA_____	23,000
Lincoln Trail_	30,975

The providers were asked if restrictions were placed by the AAA on the services provided using III-B funds. Narrative answers to this question indicate that services are limited to persons age 60 and over and helping those in greatest economic and social need.

- Counsel and advise are provided to clients over age 59 regardless of income.
- Litigation services are limited to those in greatest social and economic need as defined by 125% of the federal poverty guidelines or other factors in certain cases.
- Emphasis is given to priority areas established by program with focus on safety, stability, health, economic security, preserving the family home.

The III-B providers were asked how they define a unit of service for reporting purposes under III-B. The answers varied from .5 hours to 1 hour, with one program reporting a definition of “legal assistance.” A uniform definition is necessary to create data that can be used to compare services from one program to another. The answers clearly show that a uniform definition needs established and utilized for future reporting. Due to the lack of a uniform definition, reporting of the number of units of service will not be included in this report, despite being collected from the Area Agencies on Aging.

All four III-B providers reported exhausting III-B funding before the end of the fiscal year. Three out of four providers report limiting services at least briefly after the year’s funding has been consumed. The majority of the AAAs acknowledge that the service provider exhausts funding before the end of the fiscal year, but all of the AAAs responded that services were not curtailed or significantly curtailed when funding was

exhausted. One AAA reported that services delivered were valued at roughly three times the funding provided.

When asked how much additional funding they need to meet the existing demand for services under III-B, programs reported figures from \$5,000 to \$50,000. Clearly current funding is not sufficient and additional funding is needed to meet the growing demand for services.

- This is a difficult question to answer, but it would require at least a doubling of the Title III funding or an additional \$75,000 in the four ADDS.
- \$5000 to \$10,000
- \$50,000

The III-B providers were asked to rate their experience with III-B funding on a scale of 1-10 with 1 being very poor and 10 being very good. The results show a fair to good experience with requesting funding. All programs reported good to very good experiences in working with their AAAs. Payment of funding reported scores of 7 to 10, while record keeping ranged from 6 to 10. Satisfaction with the amount of funding provided averaged a score of 5.75, slightly above neutral. Reporting requirements and the reporting process had the widest range of scores from 3 to 10. The narrative on how the system could be improved indicates that more time to file reports would be helpful.

Requesting Funding	Amount of Funding	Working with AAA	Payment	Recordkeeping	Reporting
9	9	5	9	9	7
9	9	8	10	10	10
6	6	4	9	7	6
6	6	6	9	9	6

**How could the system of requesting funding, receiving funding, or reporting services provided under this contract be improved?**

- It is sometime difficult to get billings by the 10th of the month. I feel like it should be changed to the 10th work day of the month.
- Better and more consistent reporting requirements of the grantors/agencies.
- Make them the same for all areas and have more interfaces with client management.

The strength of III-B funding are reported as g flexibility to help vulnerable seniors without restrictions on income and assets. The weakness of III-B funding was uniformly reported a lack of sufficient funding to meet the need for services.

**What are the Strengths of Title IIIb Funding**

- The ADDs are great to work with and most of the billing sheets are easy to use.
- With title III funding, we are able to represent clients regardless of their income. Otherwise, our services would be limited.

- We can do all types of work for people who need it so long as they are elderly.
- Allows for critical legal services to be provided to vulnerable seniors.

**What are the weaknesses of title IIIb funding?**

- XXX could use a lot more funding (units) for the work that we provide. The XXXX funding is extremely low for the service demand.
- We exhaust funds early in the year.
- Not enough funding to meet the need.
- Limited amount available.

A very significant part of the data reported for this project is contained in a spread sheet covering the reported services by county and problem code across the state of Kentucky. These numbers report the number of cases closed in a recent 12 month period. The data reflects services from all programs. A modest number of services were reported outside the service area of the program reporting the service. The report contains the services provided by the Legal HelpLine for Older Kentuckians.

**The Top 10 Legal Issues:**

Rank	Problem Code	legal issues	number of cases
1	95	estate planning, probate, LW, POA	947
2	51	Medicaid	627
3	2	Collection	457
4	52	Medicare	401
5	96	Advance Directives	400
6	32	Divorce	188
7	99	Other misc	162
8	62	private landlord tenant	152
9	63	public housing	141
10	33	Guardianship	111

**Area Agency on Aging III-B reports**

All of the Area Agencies on Aging were asked who they contracted with for III-B services. The reported contracts cover the entire state and the programs reported by the AAAs match the contracts reported by the regional legal aid programs. The AAA’s were asked to report the hourly rate if they contracted for III-B services on an

hourly basis. The AAA's reported paying from \$25.38<sup>1</sup> per hour to \$70.00 per hour, with the average cost per hour of \$52.76. Three AAA's report paying a fixed contract fee for services. All AAA's reported that they have contracted with the regional Legal Service Corporation funded legal aid program.

**If funding is paid on an hourly basis, what is the hourly rate?**

BRADD	\$60
BSAAA	\$25.38
BGAAA	n/a
BTAAA	\$64.42
CVAAA	\$50.11
FIVCO	\$67.57
Gateway	n/a
GRADD	\$50
KIPDA	\$50
KY River	\$42.97
Lincoln Trail:	\$70
NKY -	NA
Pennyrile	\$50
Purchase	\$50

The AAA's were asked how many units of service, how many clients and what level of service was provided in the most recent year of reported data. The number of units of service has been omitted from this report due to a lack of uniformity on the definition of a unit of service.

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How do you defined a unit of service

1/2 hour

1 hour

1 hour

1 hour

1 hour

---

<sup>1</sup> Below the actual cost of providing services.

1 hour

1 hour

1 hour

narrative answer

one session

1 hour

1/2 hour

1/2 hour

1 hour

1 hour

Cases closed Using III-B Funding in a 12 month period

	# Clients	Advice	Assistance	Administrative	Court	Other
Barren River Area Agency on Aging	449					
Big Sandy Area Agency on Aging	51					
Bluegrass Area Agency on Aging	637	158	440	5	27	7
Buffalo Trace Area Agency on Aging	55	21	19	9	6	0
Cumberland Valley Area Agency on Aging						
FIVCO Area Agency on Aging	101	30	54	2	2	0
Gateway Area Agency on Aging	21					
Green River Area Agency on Aging	540					

KIPDA Area Agency on Aging	337	160	247	8	70	
Kentucky River Area Agency on Aging	28	6	17	1	0	0
Lake Cumberland Area Agency on Aging	198					
Lincoln Trail Area Agency on Aging	30					
Northern Kentucky Area Agency On Aging	419					
Pennyrile Area Agency on Aging	788					
Purchase Area Agency on Aging	468					

The AAA's were asked what other services, in a matrix of services, were regularly provided by the legal service provider under the III-B contract.

	<b>Direct Representation</b>	<b>Telephone</b>	<b>Wills, Living Wills and Powers Of Attorney</b>	<b>Presentations</b>	<b>Training</b>	<b>Technical Assistance</b>
<b>Barren River Area Agency on Aging</b>	yes	yes	yes	yes	yes	yes
<b>Big Sandy Area Agency on Aging</b>	yes	yes	yes	yes	yes	yes
<b>Bluegrass Area Agency on Aging</b>	yes	yes	yes	yes	yes	yes
<b>Buffalo Trace Area Agency on Aging</b>	yes	yes	yes	yes	yes	yes
<b>Cumberland Valley</b>	yes	yes	yes	yes	no	no

**Area Agency on Aging**

**FIVCO Area Agency on Aging**

yes yes yes yes yes yes

**Gateway Area Agency on Aging**

yes yes yes yes no yes

**Green River Area Agency on Aging**

yes yes yes yes yes yes

**KIPDA Area Agency on Aging**

yes yes yes yes yes yes

**Kentucky River Area Agency on Aging**

yes yes yes yes yes no

**Lake Cumberland Area Agency on Aging**

yes yes yes yes no no

**Lincoln Trail Area Agency on Aging**

yes no yes yes no no

**Northern Kentucky Area Agency On Aging**

yes yes yes yes yes no

**Pennyrile Area Agency on Aging**

yes yes yes yes yes yes

**Purchase Area Agency on Aging**

yes yes yes yes yes yes

**The AAA's were asked to provide a narrative description of the services provided by their legal services provider:**

- Title III and SHIP Benefits Counseling and Title III Legal Assistance Services.

- Bankruptcy; consumer protection; guardianship; Medicare, Medicaid, and SSI; Divorce.
- XXX provides legal representation and advice in issues affecting the elderly, including family law cases such as divorce, domestic violence, etc.; consumer issues like home foreclosures, bankruptcies and other consumer issues; government benefits like SSI and Medicaid, and housing cases like evictions and admissions cases.
- XXX provides no-cost legal assistance to poor.
- XXX provides legal advice and counseling.
- XXX provides protective services, healthcare, public benefits, housing assistance, other civil cases and administration of one educational program.
- Provides legal assistance and counseling.
- Administers the SHIP program, provides legal representation / advice to community dwelling seniors when necessary; provides legal assistance to residents, family members, guardians and power of attorney for long term care residents.
- Provides counsel and advice and non-litigation and litigation services to the elderly and to low-income individuals with the greatest economic and social need.

**The question was asked if there were any restrictions on the services offered by the legal services providers.**

**Restrictions and types of cases handled:**

- XXX does not take criminal cases.
- The case must fall within XXX priorities and case acceptance guidelines.
- XXX takes no fee generating case or criminal cases.
- XXX is based on national initiatives and availability of funds (services to seniors, housing, wills, poa); no criminal law, estate planning or real estate is conducted.
- Count only people over age 60. Core legal Services.
- Case acceptance determined by prioritized issues addressing greatest social and economic needs – representation in Medicaid and Public Benefit appeals, appeals defending involuntary discharges from nursing homes, bankruptcy, defense against foreclosure lawsuits, predatory lending practices, eviction defense, assistance with wills and living wills and powers of attorney.
- No representation of undocumented aliens, does not file class action litigation, and does not represent prisoners.

A priority under the Older Americans Act is targeting services to those in greatest social and economic need, urban and inner city, isolated and minority seniors.

**The question was asked of the AAA's how do they encourage their legal service providers to target services.**

**BRADD:** targets Title III B services to those with the greatest economic and social needs, but information, referral and assistance is available.

**BSAAA:** greatest economic and social need.

**BGAAA:** gives preference to those in greatest need, but there are no income requirements. It mostly depends on what type of case it is.

**BTAAA:** targets those with the greatest economic and social need. XXX gives preference to those in greatest need, but there are no income requirements. It mostly depends on what type of case it is.

**CVAAA:** targets greatest economic and social need.

**FIVCO:** XXX gives preference to those in greatest need, but there are no income requirements. It mostly depends on what type of case it is.

**Gateway:** yes.

**GRADD:** yes.

**KIPDA:** Age 60 and over is the main priority. Should resources for services become limited, low-income minority elderly are to be made priority.

**Lake Cumberland:** targets service to those with the greatest economic and social need.

**Lincoln Trail:** target those with greatest need.

**NKY:** target those with the greatest economic and social need.

**PR AAA:** provide counsel and advice and non-litigation services to clients 60 and over without regard to income. Litigation assistance directed toward low-income individuals with greatest social and economic need.

**Purchase:** no specific response

**Of those programs reporting, the average AAA reports that they budget 3.75% of their Title III-B funding for legal services.**

BRADD	5.5 %
BSAAA	3.2%
BGAAA	3.1%
BTAAA	10%
CVAAA	2%
GRADD	3.8
KIPDA	3%
Ky River	2%
Lake C	4.16%
Lincoln Trail	1%
NKY	5%
Purchase	4%
Purchase	2.1%

All but one AAA's reported that their provider exhausts funding before the end of the fiscal year and all AAA's responding reported that services are not reduced in a meaningful way by their legal service providers.

**The AAA's were asked to rate their relationship with their legal services provider:**

Excellent	Good	Fair	Other
8	6	1 <sup>2</sup>	

**The most common response to how to improve the working relationship with the legal services provider was to improve communications, followed by increased funding.**

- Work on our communication. Except for monitoring we never hear too much from the legal side. We are more involved with our SHIP counselor who is with the same office, but do not have much communication or receive detailed reports about the legal service side or know when attorneys are in our area.
- Not sure at this time.
- Open Communications.
- More Funding.

**The AAA's were asked for suggestions for roundtable topics to be covered in discussions of how to improve legal service delivery in Kentucky.**

- How to continue to provide services with limited funding but increasing demand.
- Guardianship and general aging population legal issues such as appeals, etc for benefits.
- Methods of communication, common types of cases, the best way to make a referral to see that it is accepted, know when our provider is in our are.
- What their cases consist of and how they are carried out.
- New trends, qualified income trust (Medicaid), more assistance with utility problems, foreclosures (region wide), need increase in services. Grandparent issues: guardianship, caregiver services, legal custody, poverty law issues.
- Expansion of services with limited funding.

**The AAAs were asked what they considered to be the strengths of their legal service provider and what topics they felt would be good replicable "best practices" from their area.**

- Kentucky Legal Aid assists the BRADD/AAAIL staff, service providers, case managers and senior center providers through training and education about issues of benefits for seniors, disabled and caregivers, and other elder law issues such as POA, Living Wills. Also, the KLA staff has assisted on Elder Abuse Prevention Council by facilitating and chairing

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<sup>2</sup> We have taken the SHIP back into the ADD and Legal Aid had it last year and it has made for difficult times and We plan on bring in the Ombudsman with ending of FY

the meetings. Many community members are on this council. When we have a legal or benefits issue that requires Legal expertise or in-depth benefits counseling, then we make a referral to KLA for services and or information and assistance. They are always willing to help and assist in training our staff.

- Coordinating Medicare Part D sign-ups.
- We always receive reports in a timely fashion and they are very responsive to any request. They contact me if there is any issue and I feel like we have a good partnership.
- The only issue we ever had was sometimes referred clients getting through to provider. The solution was to have client tell receptionist that they are a IIB referral.
- Referrals, answer specific questions from AAA staff.
- Counseling services in mortgage foreclosure and negotiations with mortgage companies on clients behalf.
- Life planning documents.

**In an effort to identify legal assistance providers outside of the traditional legal services network the AAAs were asked to identify other resources that help clients with legal issues.**

Better Business Bureau  
270-781-8445  
830 Fairview Ave.  
Bowling Green, KY 42102  
Email: lchambers@bbbkyin.org

Barren River Safe Space  
270-781-9336  
P O Box 1941  
Bowling Green, KY 42102  
Email: lalcott@barrenriverareasafespace.com

Access To Justice Foundation  
Legal HelpLine for Older Kentuckians  
535 West Second Street, Suite 101  
Lexington, KY 40508  
800-200-3633  
Email: nhanley@mis.net

Pro bono programs operated by the legal service providers

## The Picture that This Data Paints

There are several strong points to be found in this data. All areas of the state have contracts between the Area Agency on Aging and the full service regional legal service

provider to provide legal assistance funded through Title III-B of the Older Americans Act. There is universal agreement that funding is insufficient to meet the need for services and that the legal service providers leverage other programs and funding to provide services far beyond the scope of the available III-B funding. The vast majority of AAA's rate their relationship with their legal services provider as good or excellent, with the only program reporting a fair relationship acknowledges that the strain is a result of restructuring of other programs, resulting in a significant reduction in funding to the legal aid program.

While there are 6 counties that had no reported III-B services, other services providers, including the Legal HelpLine and Legal Services Corporation- funded programs, provide services in those counties. Identifying the un-served or under-served counties will allow the partners to leverage additional resources to these counties to assure access to services by seniors in those communities.

The reports indicate that services are provided to clients qualified under the Older Americans Act (60 and over without regard to income) and targeted at those in greatest economic and social need including isolated and at risk populations. Special projects such as the grandparent's program being piloted between KIPDA and the Legal Aid Society in Louisville demonstrate innovative and creative programming to address the unique issues of law and aging and to leverage limited resources to meet the needs of older Kentuckians. Several programs coordinate local SHIP (health information assistance programming) and long term care ombudsmen programs along with legal services. This partnership appears to leverage resources resulting in high levels of service. ‘

## Next Steps

We now have the information needed to engage in meaningful strategic planning. The next step is to convene a meeting of all providers and funders and examine this information before us.

### **Some specific topics to consider include:**

- Leveraging existing services, including pro bono and the Legal HelpLine, to provide coverage to counties reporting no services or which are clearly under-served by proportion to population.
- Comparing the legal needs reported by older clients to the actual legal services we are providing.
- Planning for better integration of services. Counting the Legal HelpLine services in the statistics shows a much more accurate level of service in the overall picture.
- Agreeing on a uniform definition of a unit of service for all reporting purposes.
- Agreeing to uniform data collection on at least an annual basis.
- Developing improved referral protocols.
- Recognizing the value of alternative services such as the Legal HelpLine.

- Expanding funding for services, including funding for the Legal HelpLine.

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**AA Survey Instrument:**

**Kentucky Model Approaches to Legal Services Development Project  
Legal Resources for Older Kentuckians  
Legal Assistance Services Questionnaire of AAAs**

Please provide responses to the following questions to determine the current status of AAAs using Title III-B funds for the provision of legal assistance services. Data from these surveys will be consolidated into a single report to reflect the overall availability of legal assistance using Title III-B funding across Kentucky.

1. With whom does your AAA contract for Title III-B legal assistance services? Give title of the legal services provider, contact information and what counties they provide services in:

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2. Describe the services of the legal services provider. Also check if services include actions listed below. \_\_\_\_\_

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- \_\_\_ direct representation / represent clients in court or administrative hearings
- \_\_\_ telephone advice
- \_\_\_ prepares Will, Living Will or Power of attorney
- \_\_\_ talks/presentations to senior events/centers
- \_\_\_ training of AAA staff and volunteers
- \_\_\_ provides technical assistance
- \_\_\_ writes articles for AAA newsletters

3. What is the total funding provided to the legal service provider by your AAA in the current year?

\$ \_\_\_\_\_

If funding is paid on an hourly basis, what is the hourly rate? \$ \_\_\_\_\_

4. Is this legal services provider funded by the federal Legal Services Corporation (LSC)?

\_\_\_ YES

\_\_\_ NO If NO, what steps have you taken to coordinate services with the LSC funded legal services provider in your area?

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5. For the most recent contract year for which you have data, how many clients were provided with legal assistance, (or how many cases were handled), under the contract with the legal services provider? What types of services were provided, and during what year?

Number of Units of service \_\_\_\_\_  
Number of clients \_\_\_\_\_ Year for Data \_\_\_\_\_

Nature of legal services provided (number of clients in each category if known):

\_\_\_\_\_ Clients provided legal advice  
\_\_\_\_\_ Clients provided legal assistance (such as creating legal documents)  
\_\_\_\_\_ Clients represented in administrative appeals  
\_\_\_\_\_ Clients represented in Court  
\_\_\_\_\_ Other please specify \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

6. How do you define a "unit of service" for reporting purposes from your provider?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Does the AAA or the legal service provider place any limitations or restrictions on the type of legal services that are provided or on the recipients of legal services? \_\_\_YES \_\_\_NO

Restrictions and types of cases handled: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Do you require your Title III-B provider to serve and count only people over 60 who would not otherwise qualify financially for legal services or do you tell the legal services provider to target their Title III-B services to those in the greatest economic and social need? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

8. What percentage of your Title III-B funding do you currently expend for legal assistance services? \_\_\_\_\_

9. Does the provider exhaust the funding before the end of the fiscal year? \_\_\_\_ yes \_\_\_\_ no

If so, do they limit services once the funding has been exhausted?  
\_\_\_\_\_

10. How would you describe the relationship between your agency and the legal services program or legal provider that receives Title III-B funds through your agency? \_\_\_\_ Excellent

\_\_\_\_ Good \_\_\_\_ Fair \_\_\_\_ Poor \_\_\_\_ Collaborative \_\_\_\_ Distant \_\_\_\_ No Contact  
\_\_\_\_ Occasional Contact. Please Check all that apply and elaborate with the following:

- a. If the relationship is fair to poor, what is the challenge? Check all that apply.

\_\_\_\_ reporting requirements \_\_\_\_ referrals \_\_\_\_ does not take enough cases  
\_\_\_\_ lack of follow-up \_\_\_\_ does not return calls \_\_\_\_ problems with intake  
\_\_\_\_ other \_\_\_\_\_

b. The best way to improve the relationship between my agency and the Title III-B legal services provider would be to \_\_\_\_\_  
\_\_\_\_\_

11. In a roundtable discussion between AAA directors and legal services providers, I would like to see discussion of the following topics:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

12. My AAA and legal services provider have worked together particularly well in the following ways and I would like to see this included in any discussion or write-up of best practices for the AAA-legal services arena.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

13. We are trying to create a directory of all programs that offer legal assistance in the Commonwealth. Please list any providers other than legal aid and your IIIb provider that provide legal advice, legal information or assistance in your area.

Provider \_\_\_\_\_ address \_\_\_\_\_  
Phone \_\_\_\_\_ email \_\_\_\_\_

Provider \_\_\_\_\_ address \_\_\_\_\_  
Phone \_\_\_\_\_ email \_\_\_\_\_

Provider \_\_\_\_\_ address \_\_\_\_\_  
Phone \_\_\_\_\_ email \_\_\_\_\_

Provider \_\_\_\_\_ address \_\_\_\_\_  
Phone \_\_\_\_\_ email \_\_\_\_\_

Provider \_\_\_\_\_ address \_\_\_\_\_  
Phone \_\_\_\_\_ email \_\_\_\_\_

Provider \_\_\_\_\_ address \_\_\_\_\_  
Phone \_\_\_\_\_ email \_\_\_\_\_

**LSC and III-B Survey Instrument**

Kentucky Model Approaches to Legal Services Development Project  
 Legal Resources for Older Kentuckians  
 Title IIIb and LSC Providers

We need your help gathering information to better understand the senior legal service network in Kentucky. This is an important step in the Kentucky model approaches to legal service development project. The overall goal is to improve access to legal aid by seniors in Kentucky. A key first step is understanding the capacity of the existing legal service providers in Kentucky. This short survey is designed to gather information to help assess the capacity of the legal service delivery system to meet the legal needs of seniors living in Kentucky. Data from this survey will be compiled into a single statewide report reflecting the availability of legal assistance by persons age 60 and older in Kentucky. Answers to questions 3, 4, 5, 6, 7, 9, 10, 11, and 12 will be reported in aggregate only to protect the confidentiality of your answers.

1. Does your program provide services under title IIIb of the Older Americans Act?  
 \_\_\_\_\_ yes \_\_\_\_\_ no

What AAA's do you have contracts to provide services in what counties?

Name of AAA	Counties Served -----

2. What level of funding do you receive for services from each AAA for title IIIb services

AAA \_\_\_\_\_ \$ \_\_\_\_\_  
 AAA \_\_\_\_\_ \$ \_\_\_\_\_  
 AAA \_\_\_\_\_ \$ \_\_\_\_\_  
 AAA \_\_\_\_\_ \$ \_\_\_\_\_  
 AAA \_\_\_\_\_ \$ \_\_\_\_\_

3. Other than the age of the clients, are there restrictions placed on the use of this funding?

- Advice Only
- Representation in court only
- Low income only
- Not able to serve all counties
- representation in limited problem codes

Describe \_\_\_\_\_

\_\_\_\_\_

4. The AAAs report services to the Department for Aging and Independent Living in “units of service.” How do you define a unit of service for reporting purposes under this contract?

\_\_\_\_\_

\_\_\_\_\_

5. Do you exhaust your available III-b funding before the end of the fiscal year?  
 yes  no

6. Do you have to decline services when your III-b funding is exhausted?  yes  
 no

7. How much additional funding do you need to meet the existing need for services by seniors in your service area?  
\$ \_\_\_\_\_

8. How would you rate the following experiences with title IIIb funding with 1 being very poor and 10 being very good:

Requesting funding	1 2 3 4 5 6 7 8 9 10
Amount of funding	1 2 3 4 5 6 7 8 9 10
Working with the AAA	1 2 3 4 5 6 7 8 9 10
Payment of funding	1 2 3 4 5 6 7 8 9 10
Record Keeping required	1 2 3 4 5 6 7 8 9 10
Reporting requirements	1 2 3 4 5 6 7 8 9 10

How could the system of requesting funding, receiving funding, or reporting services provided under this contract be improved?

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9. What are the strengths of title IIIb funding

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10. What are the weaknesses of title IIIb funding?

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11. Please attach the a Kemps report showing services by county and problem code, provided under Title III-B funding in the most recent 12 month period.

## **AAA Survey Summary**

Kentucky Model Approaches to Legal Services Development Project  
Legal Resources for Older Kentuckians  
Legal Assistance Services Questionnaire of AAAs

Please provide responses to the following questions to determine the current status of AAAs using Title III-B funds for the provision of legal assistance services. Data from these surveys will be consolidated into a single report to reflect the overall availability of legal assistance using Title III-B funding across Kentucky.

With whom does your AAA contract for Title III-B legal assistance services? Give title of the legal services provider, contact information and what counties they provide services in:

### **BRAAA:**

Kentucky Legal Aid  
1700 Destiny Lane  
Bowling Green, KY 42104  
270-782-1924 or 1-800782-1924  
Intake 270-782-5740 or 1-866-452-9243

### **BSAAA:**

Appalachian Research and Defense Fund (Appalred)  
Cynthia Elliott, Executive Director  
Floyd, Johnson, Magoffin, Martin and Pike Counties

### **BGAAA**

Legal Aid of the Bluegrass, 498 Georgetown Street, P.O. Box 12947, Lexington, KY 40583  
859-233-4556 (phone), 859-233-1907 (Fax)  
Counties Served: Anderson, Boyle, Bourbon, Clark, Estill, Fayette, Franklin, Garrard, Harrison, Jessamine, Lincoln, Madison, Mercer, Nicholas, Powell, Scott, and Woodford

### **BTAAA**

Brenda Combs/Richard Cullision  
Legal Aid of the Bluegrass  
320 East Main Street  
PO Box 1040  
Morehead, Kentucky 40351-1040  
1-800-274-5863  
606-784-8921

### **CVAAA**

ARDF

Prestonsburg, KY

Fivco

LABAW

Morehead, Ky

Gateway

Legal Aid of the Bluegrass

320 E. Main St. Morehead Ky 40351

Counties: Menifee, Morgan, Montgomery, Bath, and Rowan

GRADD

Kentucky\_Legal\_Aid

KIPDA

Legal Aid Society, Louisville, KY

Jefferson, Oldham, Trimble, Henry, Shelby Spencer, Bullitt

Ky River

Appalachian Research & Defense Fund of Kentucky (606) 886-3876 serving Breathitt, Knott, Lee, Leslie, Letcher, Owsley, Perry and Wolfe Counties

Lake Cumberland

ARDF, Columbia, KY 270-384-4707 Marilyn Newman, Adair, Casey, Clinton,

Cumberland, Green, McCreary, Pulaksi, Russell, Taylor, Wayne

Lincoln Trail Legal Aid Society Louisville

NKY: Legal Aid of the Bluegrass Covington, Boone, Kenton, Campbell, Gallatin,

Pendleton, Grant, Carroll, Owen

PR-AAA Kentucky Legal Aid, Bowling Green, all 9 counties

Purchase: Kentucky Legal Aid Bowling Green, KY Ballard, Calloway, Fulton, Graves, Hickman, Marshall, McCracken

Describe the services of the legal services provider. Also check if services include actions listed below.

BRADD Title III and SHIP Benefits Counseling and Title III Legal Assistance Services

BSAAA- Bankruptcy; consumer protection; guardianship; Mdicare, Medicaid, and SSI;

Divorce

BGAAA:

LABG provides legal representation and advice in issues affecting the elderly, including family law cases such as divorce, domestic violence, etc.; consumer issues like home foreclosures, bankruptcies and other consumer issues; government benefits like SSI and Medicaid, and housing cases like evictions and admissions cases.

BTAAA LABG provides legal representation and advice in issues affecting the elderly, including family law cases such as divorce, domestic violence, etc.; consumer issues like home foreclosures, bankruptcies and other consumer issues; government benefits like SSI and Medicaid, and housing cases like evictions and admissions cases.

CVAAA- Provides no cost legal assistance to poor

Gateway: Legal advice and Counseling

GRADD – no narrative, see excel for types-

KIPDA: Protective services, healthcare, public benefits, housing assistance, other civil cases and administration of one educational program

KY River Provides legal assistance and counseling

Lake Cumberland – see attached flyer

Lincoln Trail – no narrative

NKY: Administers the SHIP program, provides legal representation / advice to community dwelling seniors when necessary provides legal assistance to residents, family members, guardians and power of attorney for long term care residents

PR AAA: Provide counsel and advice and non-litigation and litigation services to the elderly and to low-income individuals with the greatest economic and social need.

Purchase- no narrative

What is the total funding provided to the legal service provider by your AAA in the current year?

BRADD- \$30,000.

BSAAA \$6,346.00

BGAAA \$28,000

BTAAA 10,000 in Title III B funding

CVAAA \$7,097

FIVCO \$8468

Gateway \$10,079

GRADD 16.997

KIPDA \$27,000 IIIB + \$15,000 family caregiver and KY caregiver assistance

KY River \$ 7,176

Lake Cumberland \$13,738

Lincoln Trail - \$70,686.25 with \$3,675 for legal services

NKY \$26,067

PR AAA 16,875

Purchase \$7235

If funding is paid on an hourly basis, what is the hourly rate?

BRADD \$60 (1/2 hour units=\$30.00 cost per half hour of service)

BSAAA \$25.38

BGAAA n/a

BTAAA \$64.42

CVAAA \$50.11 for representation \$28.12 benefits counseling

FIVCO \$67.57

Gateway n/a

GRADD 50.00

KIPDA \$50

KY River Funding provided by unit rate of \$22.61 Counseling & \$42.97 Legal Assistance

Lincoln Trail: \$70

NKY - NA

PR AAA \$50

Purchase \$50

Is this legal services provider funded by the federal Legal Services Corporation (LSC)?

\_\_\_ YES

BRADD, BSAAA, BGAAA, BTAAA, Fivco, Gateway, GRADD, KIPDA, KY River, Lake Cumberland, Lincoln Trail, NKY, PRAAA, Purchase

\_\_\_ NO

If NO, what steps have you taken to coordinate services with the LSC funded legal services provider in your area?

For the most recent contract year for which you have data, how many clients were provided with legal assistance, (or how many cases were handled), under the contract with the legal services provider? What types of services were provided, and during what year?

BRADD

Number of Units of service 900 units Title III Legal and Benefits Counseling

Number of clients 449 unduplicated Year for Data: FY 2007

BSAAA

592.5 \_\_\_\_\_

Number of clients \_\_\_51\_\_\_ Year for Data \_\_\_FY 08\_\_\_\_\_

BGAAA

Number of Units of service \_\_\_783\_\_\_\_\_

Number of clients \_\_\_637\_\_\_\_\_ Year for Data \_\_\_FY\_2008\_\_\_\_\_

Nature of legal services provided (number of clients in each category if known):

Nature of legal services provided (number of clients in each category if known):

BGAAA

158 Clients provided legal advice

440 Clients provided legal assistance (such as creating legal documents)

5 Clients represented in administrative appeals

27 Clients represented in Court

7 Other please specify \_1 client was referred to another agency after a legal assessment, 1 client had a change in eligibility status, and 5 clients withdrew or did not return

BTAAA:

Number of Units of service \_\_183\_\_\_\_\_

Number of clients \_\_55\_\_\_\_\_ Year for Data \_\_\_\_2007\_\_\_\_\_

Nature of legal services provided (number of clients in each category if known):

\_\_\_21\_\_\_\_\_ Clients provided legal advice

\_\_\_19\_\_\_\_\_ Clients provided legal assistance (such as creating legal documents)

\_\_\_9\_\_\_\_\_ Clients represented in administrative appeals

\_\_\_6\_\_\_\_\_ Clients represented in Court

\_\_\_0\_\_\_\_\_ Other please s

CVAAA:

Number of Units 198 Number of Clients \_\_\_not reported--- year 2008

Fivco:

Number of units 200 number of clients 101 year 2007

30 legal advice

54 legal assistance

2 adminstrative appeals

2 represented in court

Gateway

Number of Units of service \_\_\_\_121\_\_\_\_\_

Number of clients \_\_\_\_21\_\_\_\_\_ Year for Data \_\_\_\_2008\_\_\_\_\_

GRADD:

Number of Units of service \_\_\_\_494\_\_\_\_\_

Number of clients \_\_540\_\_\_\_\_ Year for Data \_FY 008\_\_\_\_\_

Nature of legal services provided (number of clients in each category if known):

\_\_\_x\_\_\_\_\_ Clients provided legal advice

\_\_\_x\_\_\_\_\_ Clients provided legal assistance (such as creating legal documents)

\_\_\_\_\_ Clients represented in administrative appeals

\_\_\_x\_\_\_\_\_ Clients represented in Court

KIPDA:

1419 units of service 337 clients in 2008

160 legal advice  
247 legal assistance  
8 administrative appeals  
70 clients represented in court

Ky River:

Number of Units of service 195  
Number of clients 28 Year for Data 2008

Nature of legal services provided (number of clients in each category if known):

6 Clients provided legal advice  
17 Clients provided legal assistance (such as creating legal documents)  
1 Clients represented in administrative appeals  
0 Clients represented in Court  
Other please specify \_\_\_\_\_

Lake Cumberland

Number of Units of service 1685.5  
Number of clients 198 Year for Data 07-08

Nature of legal services provided (number of clients in each category if known):

\_\_\_\_\_ Clients provided legal advice  
\_\_\_\_\_ Clients provided legal assistance (such as creating legal documents)  
\_\_\_\_\_ Clients represented in administrative appeals  
\_\_\_\_\_ Clients represented in Court  
\_\_\_\_\_ Other please specify

Lincoln Trail:

Number of Units of service 240  
Number of clients 30 Year for Data 08 FY

Nature of legal services provided (number of clients in each category if known):

Y Clients provided legal advice  
Y Clients provided legal assistance (such as creating legal documents)  
Y Clients represented in administrative appeals  
Y Clients represented in Court  
Other please specify \_\_\_\_\_

NKY

Number of Units of service 766  
Number of clients 419 Year for Data 08 FY

Nature of legal services provided (number of clients in each category if known):

\_\_\_\_\_ Clients provided legal advice  
\_\_\_\_\_ Clients provided legal assistance (such as creating legal documents)  
\_\_\_\_\_ Clients represented in administrative appeals  
\_\_\_\_\_ Clients represented in Court  
\_\_\_\_\_ Other please specify

PR AAA

Number of Units of service 622

Number of clients 788 Year for Data 08 FY

Nature of legal services provided (number of clients in each category if known):

\_\_\_\_\_ Y \_\_\_\_\_ Clients provided legal advice  
\_\_\_\_\_ Y \_\_\_\_\_ Clients provided legal assistance (such as creating legal documents)  
\_\_\_\_\_ Clients represented in administrative appeals  
\_\_\_\_\_ Clients represented in Court  
\_\_\_\_\_ Other please specify

Purchase

Number of Units of service 718

Number of clients 468 Year for Data 08 FY

Nature of legal services provided (number of clients in each category if known):

\_\_\_\_\_ Clients provided legal advice  
\_\_\_\_\_ Clients provided legal assistance (such as creating legal documents)  
\_\_\_\_\_ Clients represented in administrative appeals  
\_\_\_\_\_ Clients represented in Court  
\_\_\_\_\_ Other please specify

How do you define a “unit of service” for reporting purposes from your provider?

BRADD 1/2 hour of services

BSAAA 1 unit per hour of service

BGAAA One Hour

BTAAA: Legal Assistance (Benefits Counseling) (1 Hour = 1 Unit) Provision of legal advice, counseling and representation by an attorney or other person acting under the supervision of an attorney.

CVAAA 1 hour

Fivco 1 hour

Gateway 1 hour

GRADD 1 hour

KIPDA: A unit is defined as the definition of service or time for purposes of reporting and billing.

Ky River Unit of services consists of one session

Lake Cumberland 1 hour

Lincoln Trail ½ hour

NKY ½ hour minutes

PR AAA 1 hour  
Purchase 1 hour

Does the AAA or the legal service provider place any limitations or restrictions on the type of legal services that are provided or on the recipients of legal services?

Yes: BRAAA , BGAAA, BTAAA, Fivco, GRADD, KIPDA, KY River, Lincoln trail, NKY, Purchase

No: BSAAA, CVAAA, gateway, Lake Cumberland

Restrictions and types of cases handled:

BRADD Kentucky Legal Aid does not take Criminal Cases

BGAAA- The case must fall within LABG's priorities and case acceptance guidelines.

BTAAA The case must fall within LABG's priorities and case acceptance guidelines

CVAAA ---- noting reported---

Fivco The case must fall within LABG's priorities and case acceptance guidelines

GRADD - no fee generating case ; criminal cases

KIPDA- based on national initiatives and availability of funds (services to seniors, housing, wills, poa) no criminal law, estate planning or real estate is conducted.

KY River no narrative

Lake Cumberland- Count only people over age 60 and

Lincoln trail- Core legal Services

NKY: Case acceptance determined by prioritized issues addressing greatest social and economic needs – representation in Medicaid and Public Benefit appeals, appeals defending involuntary discharges from nursing homes, bankruptcy, defense against foreclosure lawsuits, predatory lending practices, eviction defense, assistance with wills and living wills and powers of attorney

PR AAA no representation of undocumented aliens, does not file class action litigation, and does not represent prisoners

Purchase 60+

Targeting services

BRADD-

We target Title III B services to those in the greatest economic and social needs, but Information, Referral and Assistance is available???

BSAAA

greatest economic and social need

BGAAA LABG gives preference to those in greatest need, but there are no income requirements. It mostly depends on what type of case it is.

BTAAA- Target those in the greatest economic and social need. LABG gives preference to those in greatest need, but there are no income requirements. It mostly depends on what type of case it is.

CVAAA- target greatest economic and social need

Fivco- LABG gives preference to those in greatest need, but there are no income requirements. It mostly depends on what type of case it is.

Gateway- yes-

GRADD – yes-

KIPDA We require provider to serve and count people over 60 with greatest economic and social need and who would not otherwise qualify financially for legal services.

Lake Cumberland target service to those with the greatest economic and social need.

Lincoln Trail- target those in greatest need

NKY- target those in the greatest economic and social need

PR AAA\_ provide counsel and advice and non-litigation services to client 60 and over without regard to income. Litigation assistance directed towards low income individuals with greatest social and economic need.

Purchase ?

What percentage of your Title III-B funding do you currently expend for legal assistance services?

BRADD 5.5 % of all Title III-B funding

BSAAA 3.2%

BGAAA 3.1%

BTAAA- 10%

CVAAA – 2%

Fivco - nothing reported

GRADD .038

KIPDA 3% (11% of federal and state funds for caregivers and grandparents raising grandchildren

Ky River 2%

Lake Cumberland: 4.16%

Lincoln Trail: 1%

NKY 5%

PR AAA 4%

Purchase 2.1%

Does the provider exhaust the funding before the end of the fiscal year? \_\_\_\_\_ yes  
BRADD, BGAAA, BTAAA, CVAAA, Fivco, Gateway GRADD, KIPDA, KY River,  
Lake Cumberland , Lincoln Trail, NKY, PR AAA, Purchase  
\_\_\_\_\_ no BSAAA

If so, do they limit services once the funding has been exhausted?

BRADD Services are still provided. KLA utilizes local cash

BGAAA- Not significantly

BTAAA- Not Significantly

CVAAA – No-2008 did just over twice as much service as we paid for

Fivco – Not significantly

Gateway n/a

GRADD – no-

KIPDA: no they use their own resources to continue services

KY River: They provide services pro bono

Lake Cumberland: yes

Lincoln Trail: No, they provide significantly more services then they are funded for last year 300% of funded services.

NKY No  
PRAAA No  
Purchase they continue to help with other funding sources

How would you describe the relationship between your agency and the legal services program or legal provider that receives Title III-B funds through your agency?

Excellent

BRADD, BSAAA, BGAAA, GRADD, KY River, Lake Cumberland, PR AAA, Purchase

Good

BTAAA, CVAAA, Fivco, KIPDA, Lincoln, NKY,

Fair Gateway<sup>3</sup>

Poor \_\_\_\_\_

Collaborative \_\_\_\_\_

Distant \_\_\_\_\_

No Contact

Occasional Contact BTAAA \_\_\_\_\_.

Please Check all that apply and elaborate with the following:

If the relationship is fair to poor, what is the challenge? Check all that apply.

\_\_\_ reporting requirements \_\_\_ referrals \_\_\_ does not take enough cases

\_\_\_ lack of follow-up \_\_\_ does not return calls \_\_\_ problems with intake

Other \_\_\_\_\_

The best way to improve the relationship between my agency and the Title III-B legal services provider would be to:

Work on our communication. Except for monitoring we never hear too much from the legal side. We are more involved with our SHIP counselor who is with the same office, but do not have much communication or receive detailed reports about the legal service side or know when attorneys are in our area.

Not sure at this time

Open Communications

More Funding

---

Round Table Topics:

How to continue to provide services with limited funding but increasing demand. Guardianship and general aging population legal issues such as appeals, etc for benefits. Methods of communication, common types of cases, the best way to make a referral to see that it is accepted, know when our provider is in our area...

---

<sup>3</sup> We have taken the SHIP back into the GADD and Legal Aid had it last year and it has made for difficult times and We plan on bring in the Ombudsman with ending of FY

What their cases consist of and how they are carried out.

New trends, Qualified income trust (Medicaid), more assistance with utility problems, foreclosure (region wide) need increase in services. Grandparent issues- guardianship, caregiver services, legal custody, poverty law issues

Expansion of services with limited funding

Best Practices:

Kentucky Legal Aid assists the BRADD/AAAIL staff, service providers, case managers and senior center providers through training and education about issues of benefits for seniors, disabled and caregivers, and other elder law issues such as POA, Living Wills. Also the KLA staff have assisted on Elder Abuse Prevention Council by facilitating and chairing the meetings. Many community members are on this council. When we have a legal or benefits issue that requires Legal expertise or in dept benefits counseling, then we make a referral to KLA for services and or information and assistance.

They are always willing to help and assist in training our staff

Coordinating Medicare Part D sign up.

We always receive reports in a timely fashion and they are very responsive to any request. They contact me if there is any issue and I feel like we have a good partnership.\_

The only issue we ever had was sometimes referred clients getting through to provider, the solution was to have client tell receptionist that they are a IIIB referral (rephrased slightly)

Referrals; Answer specific questions from AAA staff

Counseling services in mortgage foreclosure, negotiations with mortgage companies on clients behalf

Life planning documents

We are trying to create a directory of all programs that offer legal assistance in the Commonwealth. Please list any providers other then legal aid and your IIIb provider that provide legal advice, legal information or assistance in your area.

Better Business Bureau

270-781-8445

830 Fairview Ave.

Bowling Green, KY 42102

lchambers@bbbkyin.org

Barren River Safe Space

270-781-9336

P O Box 1941

Bowling Green, KY 42102

lalcott@barrenriverareasafespace.com

Access To Justice

800-200-3633

[nhanley@mis.net](mailto:nhanley@mis.net)

**LSC and III-B Survey Summary**

Kentucky Model Approaches to Legal Services Development Project  
 Legal Resources for Older Kentuckians  
 Title IIIb and LSC Providers

We need your help gathering information to better understand the senior legal service network in Kentucky. This is an important step in the Kentucky model approaches to legal service development project. The overall goal is to improve access to legal aid by seniors in Kentucky. A key first step is understanding the capacity of the existing legal service providers in Kentucky. This short survey is designed to gather information to help assess the capacity of the legal service delivery system to meet the legal needs of seniors living in Kentucky. Data from this survey will be compiled into a single statewide report reflecting the availability of legal assistance by persons age 60 and older in Kentucky. Answers to questions 3, 4, 5, 6, 7, 9, 10, 11, and 12 will be reported in aggregate only to protect the confidentiality of your answers.

12. Does your program provide services under title IIIb of the Older Americans Act?  
 \_\_\_XXXX\_\_ yes \_\_\_\_\_ no All 4 regional legal aid programs responded yes

What AAA's do you have contracts to provide services in what counties?

Name of AAA	Counties Served -----
PADD	Ballard, McCracken, Marshall, Calloway, Graves, Carlisle, Hickman, Fulton
PEADD	Crittenden, Hopkins, Muhlenberg, Todd, Christian, Trigg, Lyon, Caldwell, Livingston,
GRADD	Union, Webster, Henderson, Daviess, Hancock, Ohio, McLean
BRADD	Butler, Edmonson, Hart, Warren, Barren, Metcalfe, Monroe, Allen, Simpson, Logan
Big Sandy ADD	Floyd, Johnson, Magoffin, Martin, and Pike
Kentucky River ADD	Knott, Leslie, Letcher, and Perry
Cumberland Valley ADD	Harlan, Knox, Laurel, Rockcastle, and Whitley
Lake Cumberland ADD	Adair, Casey, Clinton, McCreary, Pulaski, Russell, Taylor, and Wayne
Buffalo Trace ADD	Bracken, Mason, Lewis, Fleming, and Robertson
FIVCO ADD	Boyd, Carter, Elliott, Greenup, and Lawrence
Bluegrass	Anderson, Boyle, Bourbon, Clark, Estill, Fayette, Franklin, Garrard,

AADD	Harrison, Jessamine, Lincoln, Madison, Mercer, Nicholas, Powell, Scott, and Woodford
Northern Kentucky ADD	Boone, Campbell, Carroll, Gallatin, Grant, Kenton, Pendleton, and Owen

No IIIB cases were reported in 6 counties.

<a href="#">Jackson</a>	Cumberland Valley
<a href="#">Lee</a>	Kentucky River
<a href="#">Leslie</a>	KRAAA
<a href="#">Monroe</a>	BRADD
<a href="#">Nicholas</a>	Bgrass
<a href="#">Owsley</a>	Kentucky River
<a href="#">Wolfe</a>	Kentucky River

There were a few counties left off the reports that had IIIB case services reported in them. This oversight has been remedied in this report.

13. What level of funding do you receive for services from each AAA for title IIIb services

III-B program reports

<u>PADD</u>	<u>6,688</u>
<u>PEADD</u>	<u>16,875</u>
<u>GRADD</u>	<u>17,361</u>
<u>BRADD</u>	<u>125,761(INCLUDES SHIP AND OMB)</u>
<u>BSADD</u>	<u>6,346.00</u>
<u>KRADD</u>	<u>7,176.00</u>
<u>CVADD</u>	<u>7,097.00</u>
<u>LCADD</u>	<u>23,087.00</u>
<u>Buffalo Trace</u>	<u>10,000</u>
<u>FIVCO</u>	<u>8,560</u>
<u>Bluegrass</u>	<u>28,000</u>
<u>Northern KY</u>	<u>26,067</u>
<u>Gateway</u>	<u>5,000</u>
<u>KIPDA</u>	<u>23,000</u>
<u>Lincoln Trail</u>	<u>30,975</u>

14. Other than the age of the clients, are there restrictions placed on the use of this funding?

- Advice Only

- Representation in court only
- Low income only
- Not able to serve all counties
- representation in limited problem codes

Only one response was recorded in the line item option, the consolidated narratives are below.

Counsel and advise are provided to clients over age 59 regardless of income. Litigation services are limited to those in greatest social and economic need defined as by 125% of the federal poverty guidelines or other factors in certain cases.

No, there are no restrictions.

Emphasis is given to priority areas established by program with focus on safety, stability, health, economic security, preserving the family home.

One survey had no answer to this question.

15. The AAAs report services to the Department for Aging and Independent Living in “units of service.” How do you define a unit of service for reporting purposes under this contract?

.5 hours for one AAA 1 hour for all others  
 legal assistance  
 1 hour  
 1/2 hour

16. Do you exhaust your available III-b funding before the end of the fiscal year?

4 yes 0 no

17. Do you have to decline services when your III-b funding is exhausted? 2

yes 1 no 1 Sometimes

18. How much additional funding do you need to meet the existing need for services by seniors in your service area?

This is a difficult question to answer, but it would require at least a doubling of the Title III funding or an additional \$75,000 in the four ADDS

\$5000 to \$10,000

no answer

\$50,000

19. How would you rate the following experiences with title IIIb funding with 1 being very poor and 10 being very good:

Requesting funding                    1 2 3 4 5 6 7 8 9 10

Amount of funding                    1 2 3 4 5 6 7 8 9 10

Working with the AAA                1 2 3 4 5 6 7 8 9 10

Payment of funding	1	2	3	4	5	6	7	8	9	10
Record Keeping required	1	2	3	4	5	6	7	8	9	10
Reporting requirements	1	2	3	4	5	6	7	8	9	10
Question 8										
Ratings a	b	c	d	e	f					
Requesting funding	Amount of Funding	working with AAA	Payment	Recordkeeping	Reporting					
	9	5	9	9	9	7				
	9	8	10	10	10	10				
	6	4	9	7	6	3				
	6	6	9	9	6	6				

How could the system of requesting funding, receiving funding, or reporting services provided under this contract be improved?

how can the funding system be improved  
 It is sometime difficult to get billings by the 10th of the month. I feel like it should be changed to the 10th work day of the month.  
 better and more consistent reporting requirements of the grantors/agencies.  
 Make them the same for all areas, have more interfaces with client management.  
 no answer

20. What are the strengths of title IIIb funding

The ADDs are great to work with and most of the billing sheets are easy to use  
 With title III funding we are able to represent clients regardless of their income, otherwise our services would be limited  
 can do all types of work for people who need it so long as they are elderly  
 Allows for critical legal services to be provided to vulnerable seniors

What are the weaknesses of title IIIb funding?

XXX could use a lot more funding (units) for the work that we provide.  
 The XXXX funding is extremely low for the service demand  
 We exhaust funds early in the year  
 Not enough funding to meet the need  
 limited amount available

21. Please attach the a Kemps report showing services by county and problem code, provided under Title III-B funding in the most recent 12 month period.  
 See Summary, excel all by problem code