**Legal Services Self-Assessment Tool**

**I. Area Agency on Aging Information**

Region:

AAA Name:

AAA Director:

**II. AAA Contact Information**

A. Provide the following information for the person completing the self-assessment:

Signature/E-Signature:

Printed Name:

Title:       Date:

Email:       Phone:

B. Provide the following information for your AAA:

Who is in charge of monitoring the legal services provider(s) in your region? Include their

contact information.

How long have they performed this role?

**III. DAAS Contact Information**

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| **IV. Legal Services Provider(s)**  A. Provide the following information for the region you serve:  Legal Services Provider(s) Name and County/-ies Served:  Contact Person(s) for each Legal Services Provider(s):  B. How long has the contact person(s) been involved in legal services?  C. Are new attorneys with less than one (1) year of experience providing services in your region? Y/N If yes, how many?  D. Are you aware of any attorney who provides services under Title III-B in your region being disbarred or reprimanded by the NC State Bar? Y/N | | |
| E. List the following about each legal services provider(s) mentioned above\*:  Counties Served: Last Monitored Date:  Legal Services Provider #1 name:   |  |  | | --- | --- | |  |  |   Legal Services Provider #2 name:   |  |  | | --- | --- | |  |  |   Legal Services Provider #3 name:   |  |  | | --- | --- | |  |  |   Legal Services Provider #4 name: | | |
| |  |  | | --- | --- | |  |  | |  |  |

F. Does your legal services provider respond to requests from the AAA in a timely fashion? Y/N

G. Is the AAA aware of the legal services provider’s policies regarding client conflicts of interest?

**V. Services Provided by Legal Services Provider(s)**

1. Looking at your legal services provider(s) data submitted for ACL data collection, does it look as though your legal services provider(s) is/are attempting to reach the target populations as outlined in the Older Americans Act? If not, explain.

2.Explain your AAA’s process for verifying units of service when monitoring?

a. What documents/reports do you review to verify units of service?

3. How does the AAA monitor and legal services provider(s) preserve attorney/client privilege while

also conducting programmatic monitoring and/or verifying units?

4. Do(es) your legal services provider(s) provide services virtually (e.g. consultations via Zoom, Teams, etc.) and in-person? Y/N

a. If yes, how?

5. Outreach

1. Do your legal services provider(s) conduct presentations or seminars? Y/N
2. Does your provider render legal services at clients’ homes if necessary? Y/N

6. Is there anything your legal services provider(s) have accomplished this year that you think bodes well of the services they provide? If so, explain here:

Thank you for your responses. Please email a copy of this self-assessment tool to [misty.piekaar@dhhs.nc.gov](mailto:misty.piekaar@dhhs.nc.gov).