

**Legal Assistance Development
Onsite Monitoring & Performance Review Tool**



Iowa Department on Aging
510 E 12th Street, Ste. 2
Des Moines, IA 50319
515.725.3333 | 800.532.3213
www.iowaaging.gov

Area Agency on Aging:		IDA Monitor:	
AAA Program Staff: (Name & Title)		Review Period:	
Attachment(s):		Date(s) of Onsite:	

Section I: Requirement Compliance Review

References Federal, State and/or contractual requirements with which the AAA must be in compliance. Deficiencies noted in this section are findings which will require corrective action.

#	Authority	Review Question	Complaint		Comments (Identify document used to verify compliance)
			Yes	No	
1	7.10(1)(a) Provider Requirements	The AAA shall award funds to the legal assistance provider(s) that most fully meets the standards given in this rule. The legal assistance provider(s) shall: a. Have staff with expertise in specific areas of law affecting older individuals with economic or social needs and give priority to issues related to income, health care, long-term care, nutrition, utilities, housing, protective services, abuse, neglect, age discrimination and defense of guardianship;	<input type="checkbox"/>	<input type="checkbox"/>	

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2	7.10(1)(b) Admin & Judicial Rep	Demonstrate the capacity to provide effective administrative and judicial representation in the areas of law affecting older individuals with economic or social needs;	<input type="checkbox"/>	<input type="checkbox"/>	
3	7.10(1)(c) Advocacy Capacity	Demonstrate the capacity to provide support to other advocacy efforts, for example, the long-term care resident's advocate program or elder abuse initiatives programs;	<input type="checkbox"/>	<input type="checkbox"/>	
4	7.10(1)(d) Service Delivery	Demonstrate the capacity to deliver legal services to institutionalized, isolated, and homebound older individuals effectively;	<input type="checkbox"/>	<input type="checkbox"/>	
5	7.10(1)(e) Non English Speaking	Demonstrate the capacity to provide legal assistance in the principal language spoken by clients in areas where a significant number of clients do not speak English as their principal language; and	<input type="checkbox"/>	<input type="checkbox"/>	
6	17-7.10(1)(f) Coordination Private Bar	Coordinate the provision of legal assistance with private bar attorneys and legal services corporation state grantees.	<input type="checkbox"/>	<input type="checkbox"/>	
7	17-7.10(2) Income Disclosure	A legal assistance provider shall not require an older individual to disclose information about income or resources as a condition for providing legal assistance under this rule.	<input type="checkbox"/>	<input type="checkbox"/>	
8	17-7.10(3) Client Information	A legal assistance provider may ask about an older individual's financial circumstances only as a part of the process of providing legal advice or counseling and representation, or for the purpose of identifying additional resources and benefits for which an older individual may be eligible.	<input type="checkbox"/>	<input type="checkbox"/>	
9	17-7.10(4) Assistance	Nothing in this rule is intended to prohibit an attorney or staff attorney from providing any form of legal	<input type="checkbox"/>	<input type="checkbox"/>	

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	Allowed	assistance or to interfere with the fulfillment of the attorney's professional responsibilities.			
10	17-7.10(5) Provider compliance with OAA regulations	The legal assistance provider and its attorney(s) and employee(s) shall comply with all federal and state laws, regulations and rules which govern ethical and professional conduct and the practice of law.	<input type="checkbox"/>	<input type="checkbox"/>	
11	17-7.10(6) Privilege	An AAA shall not require a provider of legal assistance to reveal information protected by attorney-client privilege.	<input type="checkbox"/>	<input type="checkbox"/>	

Section II: Program/Service/Area/Contract Performance

Addresses achievements, goals, challenges, and needs.

#	Topic	Question(s)	Response(s)
1	Goals	What are the goals?	
2	Achievements	Describe the achievement(s) over the past year.	
3	Challenges	What barriers or challenges have been experienced?	
4	Technical Assistance	Are there areas that would benefit from additional technical assistance?	