

NWX-HHS-AOA 1 (US)

**Moderator: Valerie Soroka
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1:00 pm CT**

Coordinator: Welcome and thank you all for standing by. I'd like to remind the participants that their lines will be on a listen only mode until today's question and answer session. This conference call is being recorded. If there is any objections, to please disconnect. And I will turn the call over now to your speakers for today, Valerie Soroka and Omar Valverde. Sir, you may begin.

Omar Valverde: Thank you (Kelly). My name is Omar Valverde. Welcome everybody. I'm with the Office of Elder Rights at AC and I'm joined here this afternoon with my colleague, Valerie Soroka.

As some of you may know, Val and I have co-administered the (model approaches) grants for going on several years now. Right Val? And we're always excited to talk to a fresh group of perspective applicants.

And I should also mention from our Office of Grants Management, we have (Ladiva Harris) with us. She'll be able to answer any questions related to the grants process that we're not able to and also questions related to the budget with regards to this FOA.

And I want to thank you all for calling in today. I know that a lot of you are eager to have a first go at a (model approaches) phase one cooperative agreement. These projects have been around since 2006 and you probably heard about them throughout your networks.

And you know that they really have made some great progress in improving legal service deliveries systems across the country. And we know you want that for your state, too.

This funding opportunity will help your state to evolve towards higher levels of capacity and service delivery impact and begin the movement towards a more integrated and cost effective legal service delivery systems that are more responsive to the whole range of a variety of legal issues impacting older adults across the country.

And certainly our timing could never be better for this type of cooperative agreement. I mean, let's face it, since 2007, we've certainly seen an intense convergence of economic social and legal issues but really have done quite the amazing job of (caring down) the (impaneled) health and financial securities seniors across the country.

And certainly it's in this kind of environment that demonstration projects like model approaches become more critical and essential to help you all take your systems to the next level and help deal with these high impact legal threats we know are out there. And believe me, we all know them well. Category's dealing with income security, Social Security, SSI, SSDI.

We see legal providers out there every day on the front lines taking on those cases and protecting those essential benefits. And, of course, we have this whole range of healthcare and long term care, financing issues, Medicare,

Medicaid issues now that are so imperative because we have full implementation of the Affordable Care Act moving forward at full speed and towards a direction of integrated managed care systems.

And, of course, you know, there's an endless manifestation of consumer fraud and scams out there and not a day goes by without something new cropping up and of course, the housing and foreclosure issues really haven't gone away yet unfortunately.

And the ones that really get me are the cases of elder abuse. Adult Protection Services was my field for a number of years in the State of Idaho and I know firsthand the nuts and the stories and levels and (averserasing) more completely than elder abuse and as you all know, this has been a key priority of (Kathy Greenly), our ASA and she's been doing this aggressively for the last 3-1/2 years.

Now (Kathy), some of you might know, comes from a lawyer's background, so she knows that there's just a whole myriad of legal issues that (stem and flow) from this category cases alone.

I mean, in theory, we could allocate all our Title 3V legal funding across the country to these cases alone, just barely, barely scratch the service in terms of the cases that are harming seniors.

And as you know, there's definitely a tremendous national movement in terms of elder abuse prevention and that activity, just let me tell you, will only intensify once the recommendation from the Elder Justice Coordinating Council are presented to Secretary Sebelius and congress for review and possible actions.

And let me just say, the member of the Elder Justice Council are very much aware, very much aware of the importance of the legal services, civil legal services in preventing and responding to all forms of elder mistreatment.

So we definitely have a surge of these, what we refer to as high impact on legal issues in all those categories I just mentioned. And at the same time, we're still in this environment after six years of either static or dwindling resources to meet the demands.

But basically you have a situation, it's a bad situation, where you have your supply and demand arrows going in exactly the opposite directions. And it's certainly a terrible position for us as an agent in disability networks and legal providers to find themselves in still.

And the real question is still, after all this time, in an environment like this, how do you build statewide legal service delivery systems that are ideally calibrated and fine-tuned for survival in an environment of low supply and high demand on the priority of legal issues?

And that is exactly the types of delivery systems the model approach's grants that are funded on under Title V, are designed to promote. These grants are more broadly described, I guess, as legal systems enhancement grants and in some instances, I think Valerie will agree with me on this as well, in the last six years they have actually reached a level and stature of the systems transformation grant.

And now the overall go of the model approaches project is the creation of a high quality, high impact legal service delivery systems that are well integrated and cost effective and that target the scarce resources that we do

have with precision to seniors with social or economic need and facing the challenges on those high impact issues that I mentioned.

Another way to state this is that through model approaches, we're trying to help the states create efficient and effective service delivery systems that are well calibrated and fine-tuned for survival in a very hostile environment of decreasing supply an increase in demand.

And you notice I say - I use the word survive all the time and I don't mean thrive. I mean these types of systems will help you survive in a very pernicious - help your states and servicing yours in a very pernicious environment.

Now I know that's rather broad, you know, 30,000 feet up in the air language, but if you translate metal approaches - the model approaches contract to the grand level, bring it right down to your tactical level, this grant has always been about creating a legal service delivery system where you have legal entities and on the right kinds of cases, priority cases, at the right level of service.

Now that's a formula that sounds really easy, you know, right entities, right cases, right levels of service and this is very simple, but it has - experience has shown me and Val the devil rally is in the details and it's just very much harder in terms of its implementation.

And achieving, kind of like an elegant balance in alignment between those three elements at the ground level. So, you know, what are the right legal entities when we say that? On the - one of the essential principles of the model approaches is to supplement the impact of a Title (3D) legal services dollars to

through the integration of vital low cost components such as the use of senior legal help lines, pro bono volunteer attorneys, law school clinics, reduced fee panels and, you know, the whole range of self-help resources that are also out there.

In a system that works well, all these vital service levy components are harnessed and leveraged to the greatest extent possible to really boost our overall service capacity to deal with a climate of increasing demands and decrease in supply on these cases.

And the more closely and tightly integrated and seamlessly integrated those components are with each other, the more an efficient cost-effective and sustainable system you will have.

Just taking the senior help lines as an example, the integration of help lines has always been a smart strategy for the states because if you think about it, you take the easier non-(court) intensive cases at the frontend and provide simple legal advice or brief service and then that frees up more time and resources for our 3B legal providers out there to handle the really difficult cases that we're talking about - going into court to fight off foreclosures, going before administrative law judges to fight the denials of Social Security and Medicare and Medicaid.

You know, folks, it's just simple effective resource allocation 101 dividing the labor in this way but this can only work, folks, if help lines are well integrated and viewed as indispensable components of the broader legal service delivery tapestry and you should know that several of the model approaches states have completed their round, have achieved this level of integration with their help lines.

They have been able to maintain their help line component beyond a three year project period which really demonstrates the thesis that well integrated systems are also sustainable systems.

And we want to see you all do that with your states as well. Another thing I want to note about senior help lines is that they have shown their effectiveness in a new domain, relatively new domain, by playing a greater role in the identification and intervention in issues related to financial abuse.

Indeed, we've seen several examples out there in states like Texas, Utah, let's see, West Virginia, New Hampshire and Michigan and even recently Georgia. All these states are positioning their help lines to better respond to issues of elder mistreatment and not financial abuse, I should note.

So we have the right entities, including the whole range of local cost mechanisms that I mentioned. We have the right cases, cases that are consistent with the Older Americans Act, that's Section 307A 11E for you citation junkies out there, of the Older Americans Act - 307A 11E and the right levels of service, full legal representation, brief service of simple legal advice.

But surrounding that seemingly simple formula is a broader strategic question. Are you reaching the right older consumers, the ones that need the most help on those high impact categories? Now the people in the most social and economic need are also defined in the Older Americans Act and there's a whole series of specific target groups under Section 306A4A of the Older Americans Act.

You all probably know those categories by heart so I'm not going to spend a lot of time on that, only if you have a specific question about reaching one of those target groups and then we'll do the best we can to advise you.

But I won't go into detail on the targeting right now. Now, of course, we have seen a wide variation throughout the states on how this entire model approaches paradigm is applied and implemented because basically there's pre-existing service delivery infrastructures out there.

There're different funding streams. There's different stakeholder interest and different fundamental administrative (structure) so they're all different. And the same is, of course, the case in your states. But regardless of the different structures and the different starting points where you all are at, there's certain essential features of the model approaches paradigm that cut across all the states regardless of what your starting point is and what your structures are.

So first, you see a - for instance, I'm going to get into those essential features now. First one of the essential features of the model approaches is the use of the legal systems developers. These are absolutely critical players because under Title VII of the Older Americans Act, they're the ones who tie directly into the state service delivery planning process.

And it is through the elder rights provisions of the state plans and the area plans of the (unintelligible) components of these efficient and effective service delivery systems can be formalized and sustained beyond the project period.

And on a broader level, LADs are really the key bridge builders that can help create a seamless interface between aging and disability and (legal) networks. It has been my experience that those two networks can really seem light years apart from each other for a number of reasons and it's even possible that some

triple A staff and legal service providers have never even sat in the room together for a discussion on legal service delivery.

Now this may or may not be the case in your states out there but in successful model approaches states we have seen (folding power) of LADs, legal systems developers, bring in those universes together for more comprehensive service delivery planning and programming implementation which is a major objective of this cooperative agreement.

And just a word of caution, if you're a help line entity that is interested in applying under this FOA, please view and describe your LAD within your FOA application as a close partner, literally attached to your hip during all the critical phases of this project.

Much of your scoring on this grant goes towards the clear articulation of your strong and substantive partnership with your state LAD. I cannot stress this enough.

Now it's also important to note effective service delivery planning never occurs in a vacuum. And that's why at the start of each one of these phase I grants, you are asked to conduct a legal needs assessment to determine what the actual legal needs of impact and (centers) are in your given state, not perceived needs or hypothesized needs. Actual needs of your target populations in your state.

But that's only half the process. And there has been some confusion in the past with previous iterations. On the flipside of the coin, there is something called legal capacity assessment that examines the existing legal service delivery infrastructure that you have to see to what degree it is actually capable of meeting the identified need.

By comparing those two sets of data from those two reports or assessments, you can begin to see where your legal service delivery gaps really are in your state, where the hard to reach seniors are.

And from there, you can make concrete recommendations and take hopefully proactive steps to address those gaps and the underserved regions of your state. So that's - and all this should accumulate in a needs and capacity assessment report within an attached set of recommendations.

And we can - we have resources that can help advise you to the different components of that. Also, many states, a high metric of achievement for these grants have been the development of uniform legal service delivery standards.

These important documents help to ensure quality and consistent legal services across a given state. The standards clearly define the role of all the vital players within your system, including the state units, the LADs, the triple As, your 3B providers, your help lines folks, et cetera, as well as setting forth clearly prior to legal issues and getting really specific on what target groups are being reached on those priority legal issues.

These documents the way I view this in my mind, is our system templates or systems blueprints that really define, describe and formalize the ideal legal service delivery systems that you're trying to achieve out there and in themselves provide a certain level of sustainability value for your systems.

And going hand in hand with the legal standards, we have seen legal reporting systems emerge in some states that - or are beginning to emerge in some states and not only collect service and case category data - that stuff's important - but also they measure program outcome and demonstrate the tangible impact

legal services have on the independence, health and financial security of seniors.

Although in this - in the context of this funding opportunity, the reporting systems are not a requirement but we all know that across the country, we have to start thinking about painting a more compelling picture of what these legal dollars are doing for seniors out there with whatever data we have available.

And we want these projects to at least start promoting serious thought and action towards those kinds of legal data collection and reporting systems. And another essential feature in the promotion of greater integration is the promotion of greater integration between aging and legal services networks.

I view this as creating reliable (land) bridges between those networks so to make these (land) bridges a reality, we have seen in previous model approaches face a greater emphasis on cross training and joint outreach activities between Title 3B providers, triple As, (unintelligible), help line staff and others to really help bridge the gap and really transcend what are the four corners of the provider contract out there and the referral protocols?

This is all part of a broader comprehensive systemic response that is at the heart of what model approaches constructs all - are all about and what we believe represents the future evolution of legal service delivery systems across the country.

And we hope to see your applications present some innovative approaches to training and outreach activities to create really those essential (land) bridges that I was talking about.

Before I turn this over to Valerie Soroka, for some comments on the cooperative agreements, I just wanted to close by saying now that we are seeing - you know, after 60 years, we are seeing an infrastructure of high quality, high impact legal service delivery systems that have been laid down in the last four rounds of model approaches.

And I really think, I'm starting to sense - or we're beginning to see a glimmer of how these delivery systems were originally envisioned the function under the Older Americans Act. And that's, because you know, as you all know, that's how the model approaches construct came to be.

It represented a lifting of those essential principles, bedrock principles from the Older Americans Act and applying those specifically to the building of the legal service delivery system that includes needs and capacity assessments, leveraging all available resources to boost capacity and the targeting of (state)'s resources to those that need help the most, those principles have always been part of the Older Americans Act.

And now through these grants that have been sharply focused on building effective legal service delivery systems, and they have resulted, I believe in many instances, they've achieved a systemic condition where the hole really has transcended or become more than the sum of its parts and we really want that for your states, too.

That's what this opportunity is all about. And we're so delighted that you are interested in competing for this exciting funding opportunity. So Valerie, with that, I'm going to turn this over to you.

Valerie Soroka: Okay. Thanks Omar.

Omar Valverde: You're welcome.\

Valerie Soroka: And welcome everybody and now that Omar has given you a very thorough overview of this funding opportunity announcement as well as a good sharing of ALE's rationale for undertaking this initiative to begin with, I just want to talk to you briefly about some of the logistics involved in the grant application process.

First of all, for those of you who are unfamiliar with the term, "cooperative agreement," a cooperative agreement is basically the grant instrument of choice among AOA ACL's programs.

A cooperative agreement is basically the same as a grant except that it allows AOA to provide a higher level of technical assistance (unintelligible) and support to grantees to ensure program success.

So this substantial involvement is in keeping with AOA's vision of enhanced delivery of senior legal services. I also want to mention that AOA ACL is in the process of adapting itself to a new grant announcement module which we are now finding contains some contradictory instructions.

For example, on Page 20, there is a chart regarding the application package components. And on that page, it says it's a 20 page project description. Narrative does not include the project abstract.

But then on - then it contradicts on Pages 23 and 24 where it says that the abstract is part of the 20 pages. What we would suggest - we've got to clean up this announcement module. We have to tweak it in order to have it apply more specifically to AOA ACL grants.

So in the meantime, I would - on this question of whether or not the summary abstract is part of the 20 page limited project narrative, I would count it as part of the 20 page limit. If you - as you come upon anything else that seems to need clarification, please give me a call. I'm at - it's in the announcement but my number is 202-357-3531 and (Ladiva Harris), who is with our grants management office, can also answer these kinds of questions. She is at 202-357-3437.

Rather than going through the announcement point by point, I think it's probably pretty self-explanatory especially after Omar's overview, so we want to give you all a chance to ask questions. So operator, if you wouldn't mind receiving those questions now, and Omar and (Ladiva) and I can try to answer them.

Coordinator: Thank you. And at this time if there're any questions or comments, if you could please press star followed by 1 on your touchtone phone. Again, that is star followed by 1 on your touchtone phone for any questions or comments. It'll take just a moment for that please.

And I am currently showing no questions. And again, to remind the parties, that is star followed by 1 on your touchtone phone for any questions or comments.

Valerie Soroka: (Kelly), this is (Valerie). May I speak now?

Coordinator: Oh sure, your lines are open.

Valerie Soroka: Okay. I just wanted to mention one thing that I think you all I'm sure have noticed, is regarding eligibility. I think you know that the only states that may

be applying under this are those that have not been among the 31 previously funded states.

And then there are more specific eligibility requirements - or not requirements but eligible applicants may be the entity within an eligible state that currently houses the state legal assistance developer or an entity within an eligible state that is experienced in providing low cost services to older persons through a senior legal help line or which proposes to develop and operate a senior legal help line.

And regardless of the originating source of the application, each proposal contains a detailed plan for direct and ongoing involvement of and leadership by the state legal assistance developer in order to help ensure sustainability.

Omar Valverde: All right, that's so good that you emphasized that last part, Valerie, because the participants will notice - the response in this criteria, they specifically mentioned the LAD's involvement, so in theory, if the - if LAD is not intricately involved or stated to be intricately involved in this, the application may very well be screened out at the front end. There's always a danger of that.

Valerie Soroka: So I just thought I'd mention the because I thought there may be some questions surrounding the eligibility portion.

Omar Valverde: Right. And also we should note that you can ask for a waiver on the match requirement here. There's a - what I would call the hardship exemption to that. We had to get that into the - weave the into the program announcement because it wasn't there originally.

But there is an opportunity for you to provide a justification why you cannot meet the match requirement and it has to be fairly detailed in terms of what your state's fiscal condition is. There could be other factors involved that could kind of impede your ability to meet that requirement.

But, you know, do the best you can if you want to meet the match, of course, but if you find your (state) in some form of hardship in terms of being able to meet that requirement, please note that waiver option is there for you and if your waiver option does not have the required level of specificity, of course, we would come back to you and request more information before we made the decision to grant or not grant the waiver. I thought I'd just point that out.

Coordinator: And I do have some questions if you'd like to take those.

Omar Valverde: Yes.

Coordinator: Okay, perfect. I have a call from (Shashana Urlich). Your line is open.

Omar Valverde: Excellent. Hey (Shashana).

(Shashana Urlich): Hi Omar and Valerie.

Omar Valverde: Hey. How are you doing?

(Shashana Urlich): I have a question about the legal needs study. Could you describe a little bit how extensive or scientific you expect that to be?

Omar Valverde: That's an excellent question. And actually there is a previously released frequently asked questions document that kind of breaks down the different

levels. We do not expect a fully scientific study that's representative of all seniors in a given state.

That is not realistic within the confines of the funds that are given out of this opportunity. However, there are other gradations that you can achieve a good sense of what the legal needs of those persons that need legal services the most in your state and there've been other tactics and techniques used by states that have been affected we see in the use of focus groups that bring in some of the target population folks that get firsthand what the legal needs area.

Also bringing in other professionals that work closely with those target populations to provide feedback in terms of what the priority issues are impacting those groups.

Now focus groups is one way you can supplement a more limited survey sample, whether you're conducting that through the mail or through a telephone survey.

All those types of techniques have their strengths and weaknesses, especially based upon the types of list you're using. The DMV lists, the voter registration lists sometimes do not - would not list the more vulnerable people, the most vulnerable people in your state so it's important to be able to have a methodology that fills in those gaps.

So what we're going to do - Val and I are going to reissue that frequently asked questions document that kind of breaks down the three levels of needs assessment but the general requirement has to be reasonable within the confines of what resources the states have available to conduct one.

And no, to answer your question, (Shashana), we don't expect a complete scientific study because we realize in terms of money and expertise necessary to achieve that, it's just not realistic for the states. So we have, you know, tried various approaches in the previous iterations of these grants.

(Shashana Urlich): Thank you.

Omar Valverde: Yes.

Coordinator: Thank you. And I do have a question from (Janet Lamb). Your line is open.

(Janet Lamb): This is (Janet Lamb).

Omar Valverde: Hi (Janet).

(Janet Lamb): How are you?

Omar Valverde: I'm doing good.

(Janet Lamb): I'm with the (unintelligible) Commission on Aging and Disability and we're very interested in the grant and so when Omar said we're really looking for (unintelligible) an training and something. So what was that?

Omar Valverde: Yes, some of the themes that run all the way through, you want to train with the key components within your service delivery networks. So we're looking for training, cross training events, joint training events where you have in the same audience, your triple As, your APS workers, long term care ombudsmen, your 3B providers, all learning about what the issues are that are common to your common target population.

So that's training, and cross training is the preferred format because I think in a lot of these cases, especially in the elder abuse prevention domain, a lot of those disciplines have a lot to learn from the others. So we need a good strong cross pollination training and agenda that could be part of your overall comprehensive plan.

And the other part was the outreach activities, getting out to those hard to reach seniors. Now, we're not just talking about going out to the senior centers. You've got to go out to some more non-traditional access points and actually some of the more successful grants that we've seen have had attorneys actually going out onsite and not just, you know, providing information and business cards.

They've actually taken intake onsite and also provided advice onsite. So we're looking to see some of that in terms of your service delivery planning. So I would say training and out - targeting the outreach activities are essential but remember, it's not just the legal providers, should not be just the legal providers going out there, you know, by themselves.

You need to bring in your - perhaps your senior help line professionals. Bring in your aging and disability folks that also have information to share about other elder and - older persons and disabilities programs that share with these audiences.

So make sure that those activities bring those networks together and - because the more jointly you can provide that type of public outreach and information, the more informed your target populations will be.

(Janet Lamb): Good.

Omar Valverde: Does that answer your question?

(Janet Lamb): It's great. Thank you.

Omar Valverde: All right, good. I'm glad that you're excited about being an applicant for this opportunity. Very glad.

(Janet Lamb): Oh yes. Thank you.

Coordinator: Thank you. We do have a question from (Fred Steele). Your line is open.

Omar Valverde: Hello (Fred).

(Fred Steele): Hi Omar and Valerie. This is (Fred), the legal service developer in Oregon. I'm in a bad cell spot. I'm on vacation this week actually, so cut me off if I'm not coming through and I'll just email later.

Valerie Soroka: Okay. We appreciate you being on the call during your vacation time.

(Fred Steele): Yes, the kids are off running around so I'm good. The - and (I'm probably going to have this) but, you know, here in Oregon, we do not have a statewide senior legal help line. To some degree, there's a, you know, I would say a philosophical opposition to doing so beyond the current infrastructure that has been set up by our two primary legal aid entities.

But that doesn't mean that they won't consider it. When the model approaches, and my first opportunity in Oregon to apply back in 2010 came up, you know, there wasn't enough - I'd only been in my developer role for a few months so I didn't have time to build up that network and to create some potential continuing of model approaches type help line beyond the three year grant.

So I didn't really know what alternatives to propose at that time. We have some options we're considering but I am still concerned about that end of the three year grant period. You know, what are the potential next steps? So obviously I've seen this phase two that's been announced here in the last couple of weeks.

It sounds very exciting. I hope to continue that. What - I mean, obviously you can't answer three years from now whether the phase two will still be available but I'm just wondering what the current thinking is so when I sit down with our executive directors of the legal aid offices in the next - next week, you know, what kind of answers can I provide to them as far as, you know, at the end of three years, what might happen to a senior legal help line. They don't want to create it and then shut it down.

Omar Valverde: That's certainly true but, (Fred), you also have to consider the - one of the requirements on the phase one here is for you and a help line entity to concurrently seek other potential funding sources, not just federal sources.

And the essence of that is showing the impact of your help line in terms of serving those people most in need and the priorities in the case categories and making the case for that.

Now, I know sometimes that's not enough. And we're fully aware of that and that's why we, you know, ACL went forward with a model approach to phase two construct. We're weren't obligated to provide that opportunity but the network convinced us that we're still needing to be done to expand the partnerships that were formed in the first three years.

So what we'll even want you to do with this grant, (Fred), is to make your help line the first three years as successful and high impact as possible and make the case for it and have it viewed as an indispensable component of your broader service delivery tapestry.

That's what I always say because if it's viewed as a standalone entity, that does not have very high survival value. Now in regards to your question whether we can actually project three years in advance, let me tell you, you can tell by the way I speak about this that I'm very passionate about the objectives of this program.

And you know (Kathy Greenley) is very passionate about legal services. But in terms of how we can project what the budgets are going to be in three years from now, but I'll tell you, if the money is there, we fully intend on proceeding with another iteration of phase two in three years.

That's always contingent upon various factors though. I've got to qualify what I say there. And the main factor is appropriations and whether the money's going to be there.

But I don't know if that's a good way to answer your question, (Fred), but I hope that it inspires you to at least go for it this time, make that component as strong as possible and look to, if not the federal funding stream, look for other sources that are within your state, whether those be foundation funds.

State appropriates we've seen in some states because those entities, with the help of state units, have helped make the case for a state appropriation to support those help line efforts. So maybe this can be the same thing for you in Oregon. I don't know. But these are all things you need to think through.

(Fred Steele): No, of course, I appreciate that. No, I see the beauty of this grant more than anything as the push towards integration and more - you know, a fuller, more comprehensive integration of services.

Omar Valverde: Yes. Yes.

(Fred Steele): With legal services and to have some very - what I think are exciting approaches to doing so, you know, bringing in the law school clinics that I don't think have been fully integrated in Oregon but I know they're expanding and developing, you know, into that, you know, and bringing those definitively into an aging services model, so you know, in the aging service delivery system.

It's just that help line and, you know, obviously a key component in trying to think through what - you know, how that can be developed and integrated, and I'm curious with the 31 states that have - you know, there're a number of the 31 states that have already done the phase one that had existing legal help lines so I would assume integration and support there was a little easier and maintenance beyond the three years.

But of states that have - I mean, in these economic times - and again, same as you at the federal level, the state level it's hard to predict what money, whether it's a state appropriation or trying to get money from foundations, most of that money has dried up in the last three to four years.

Omar Valverde: Yes. Yes.

(Fred Steele): So anyway, maybe this is a conversation for later. I just didn't know if you had any de- I appreciate your answer and I think that, you know, that it probably wasn't anything I wasn't expecting. Just didn't know if there

might've been something different there eligible to myself and the other states on this call.

But if there was, you know, just that one piece I might add, if there's something that you could provide, you know, some of those 31 states that did not have a legal help line, developed a legal help line, did any of them maintain their help line and how were they able to do so?

Omar Valverde: Right. Yes, would you like that up to include, like, a list of that in the frequently asked questions document?

(Fred Steele): That would be wonderful and I'd appreciate that. It just - it'll help me when I sit down with our executive directors and our two legal aids, so I appreciate that.

Omar Valverde: That makes a lot of sense. All right, thank you, (Fred) and good luck.

Coordinator: Thank you. Our next question comes from (Steven Palatere). Your line is open.

(Steve Palatere): Hello, this is (Steve Palatere). I'm the director of finance at the Northwest Justice Project here in Washington State.

Omar Valverde: Oh, okay. Hi (Steve).

(Steve Palatere): Hi. And I'm sort of sitting in for (John Kleinberg) who would be the lead on this. He's on vacation but he'll be back next week. We'll be tackling this proposal. One of the questions that we've got is that we do have a senior legal hot line. We've got a - actually a regular legal hot line as well. We've had one since the mid '90s. And, in fact, the senior component of that was started, if you will, with AOA grants back in the '90s and right into, like, 2005.

Omar Valverde: Yes. Yes, I seem to remember that. I was with the Idaho Commission on Aging back then. Yes, I remember my neighbor, Washington had that. You bet.

(Steve Palatere): And we actually - we have been able to sustain it. It has been difficult at times to sustain funding from various components but we have been able to sustain both hot lines though ups and downs.

Our question is, is because we have a hot line and there is a somewhat coordinated system here, and we are in one of the states that isn't excluded formerly in the proposal, are we - I guess, the question, are we in a good position to seek funding to enhance and fulfill other aspects of our system and coordination effort, I guess?

Valeria Soroka: Yes. Absolutely, (Steve), because, you know, a major - as Omar said, a major focus of this grant is integration and also as Omar said, we know that states - different states are at different stages of development in terms of integration and in terms of as we just heard (Fred) saying that there is no help line in Oregon.

You have one. But we're confident that, you know, it's not really a huge amount of funding. We're sure that you can put those funds to good use in making sure that everything within your state is integrated. So Omar, do you agree? I mean, I think...

Omar Valverde: Certainly. Certainly that's part of it. But you can also allocate for the funds, so your existing entity to expand the parameters of their activities. And an example is, if you want to sharpen that help line's ability to assess and

respond to elder abuse related legal issues and there're lots out there, you know.

You know, guardianship abuse issues and misuse powers of attorney, you know, recovering loss assets to the degree that's possible, and several other areas of, you know, creditor harassment issues, you can sharpen and enhance the capacity of that help line using the funds in this grant.

But once again, you have to do this in coordination with your state unit because your - ostensibly we're talking about a contract for the helpline to do enhanced activities under this grant. Does that make sense, Val?

Valerie Soroka: Yes, definitely.

Omar Valverde: Yes.

Valerie Soroka: Does that...

(Steve Palatere): That's exciting. Yes, we see this as an opportunity to garner some additional resources to do just that, to bring us closer to that LAD and to the triple As and others and to use the funds to get some outreach and some - and really to kind of step on the gas from what we've already got.

Omar Valverde: Yes, that LAD connection is essential. Those states that I mentioned - I'm not going to mention out loud but we will put this information on the FAQ document. Their - the secret of their success was having a great relationship with the state unit and the LAD. It really helped them sell their help line model at the state level.

And so that's definitely something that needs to be considered. And this entire, you know, grant is about boosting your statewide capacity and we view help lines as an essential aspect of that. We have viewed them since the beginning as essential mothers of low cost mechanisms within this construct.

(Steve Palatere): Okay, thank you.

Omar Valverde: Yes.

Coordinator: Thank you and I am showing no further questions at this time.

Omar Valverde: All right. Okay, well, like we said, we're going to - Val, you and I are going to put together a frequently asked questions document based upon what we heard and also maybe other thoughts we might have in terms of points of clarification.

We want to get - Valerie, correct me if I'm wrong - we want to get more clarify in terms of the final page count, whether that abstract counts or does not count against the 20 page limit.

Valerie Soroka: I would say that, you know, for the time being...

Omar Valverde: We have to presume it does count.

Valerie Soroka: It presumes that it...

Omar Valverde: Presume it does.

Valerie Soroka: So that you don't, you know, overextend yourself but you know, Omar and I are - we see a lot of things that need to be clarified and we're going to work with our grants management officer to try to get you an answer soon.

Omar Valverde: Right. Yes, there have been some challenges through our Office of Grants Management with this new module. And changes always have speed bumps so we grant that.

Valerie Soroka: Right.

Omar Valverde: Anything we can do to make the process smooth and feel free to have, you know, conversations with either me or Val, anything that you need. It (doesn't) ask uniformly of all applicants that we have 100% access policy in terms of you calling in if you have questions about whether you're on the right track.

We can't write the application for you but we can tell you - definitely give you a sense of where you're going and help bounce ideas off us, right? So - but everybody has an equal chance to do that. Remember that, okay?

And, of course, you know we have a resource center dedicated to supporting - fully supporting all the goals and objectives of these grants. National legal resource center really has some great folks involved. We have the Center for Elder Rights advocates that has helped us so tremendously these last few years in terms of supporting the help line component as well as TCSG that goes into the broader systemic issues that are at the hardened core of this construct.

So please use them because that's what we're given the money to do. And that's the bottom line. And once your system is in place, and we're talking - I was talking about the training component early on and with another listener,

yes, definitely we have some of the key (elder) law experts in the country that are housed within the resource center construct.

So use them to help plan and participate in your trainings. So these are all thoughts I want you all to keep in mind. Once again, Valerie and I have been and always shall be at your service, so Valerie, any closing thoughts?

Valerie Soroka: No. And (Ladiva), I don't - I imagine that unless (Ladiva) has questions posed to her, you might not have anything to add, but just a reminder that (Ladiva Harris) would be able to answer questions about your budget submit- you know, the budget portion of the application and so forth. And all the information, all the phone numbers are in the announcement.

Omar Valverde: Fantastic, Val. Thank you for being such a good colleague on these grants over the years.

Valerie Soroka: Sure. My pleasure.

Omar Valverde: Thanks everybody.

Valerie Soroka: Thank you.

Coordinator: Thank you. That does conclude today's conference call and you may all disconnect at this time.

END