



**THE KERBY CENTRE'S
LEGAL SERVICES PROGRAM:
AN EXAMINATION OF CLIENTS' EXPERIENCES**

Prepared for:

The Kerby Centre

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1.0 INTRODUCTION

1.1 Background

The Kerby Centre offers numerous services and programs to older adults in the Calgary area. One of these is the Legal Services Program offered by the Information Centre through which clients can receive a brief, free session with a lawyer who will provide them with assistance such as legal advice and drafting or reviewing documents (e.g., wills, powers of attorney, personal directives). Historically, the legal services were provided by volunteer lawyers from the Calgary community and were offered during two afternoons per week. In early 2013, the Kerby Centre entered into a partnership with Calgary Legal Guidance (CLG) whereby a lawyer from CLG would provide legal sessions at the Kerby Centre one afternoon per week in addition to the sessions conducted by the volunteer lawyers.

In the fall of 2012, the Canadian Research Institute for Law and the Family (the Institute) began discussions with the Kerby Centre to undertake a research project that would provide information about the process and effectiveness of the Legal Services Program. Specifically, the project was designed to collect information from the participating lawyers regarding the number of sessions conducted, the legal issues discussed during the sessions, and the actions undertaken to assist clients with their legal needs. In addition, clients were asked to complete a brief survey following their session that collected information regarding their legal needs and the extent to which the lawyer addressed those needs, as well as their satisfaction with the assistance they received. Clients were also asked to complete a follow-up mail survey two to three months following their initial session to determine whether they had accessed any additional legal services to assist them with their legal needs and whether they had any outstanding legal issues for which they required assistance. This report presents the findings from this research project.

1.2 Methodology

The Kerby Centre Legal Services Program offers brief, free legal services to older adults three afternoons per week. Attendance at the program is by appointment only and approximately 30 to 40 sessions are conducted per month. Sessions are offered by either volunteer lawyers from the Calgary community or by a staff lawyer from CLG. The Institute conducted a research project that was designed to collect information regarding the program and characteristics of its clients. The project began in early February 2013 and data collection continued until December 6, 2013. Three data

collection components were involved in the project: (1) information regarding the sessions provided by participating lawyers; (2) a survey completed by clients following their session; and (3) a follow-up survey completed by clients two to three months after their session.

1.2.1 Lawyer Consultation Session Forms

Beginning on February 6, 2013, lawyers conducting legal consultation sessions at the Kerby Centre were asked to collect information on each session they held using a form provided by the researchers (see Appendix A). The form included information on the legal issues discussed with clients, the actions undertaken on behalf of the client, the length of time spent with the client, and whether they thought that the legal issue presented by the client represented an appropriate referral to the program. Completion of these forms continued until September 12, 2013. Data were collected on a total of 242 sessions.

1.2.2 Survey of Legal Needs among Kerby Centre Clients

Immediately following their consultation session, clients were asked to complete a brief survey, place it in a provided envelope, and drop it off at the Information Centre reception desk (see Appendix B). This survey solicited information on clients' reasons for attending a legal consultation session, whether the lawyer was able to provide the advice they needed and if so, what the lawyer did to assist them, whether they had any other legal needs, and their level of satisfaction with the services provided to them by the lawyer. Collection of these surveys took place from February 6, 2013 to September 12, 2013. A total of 133 completed surveys were received.

1.2.3 Follow-up Survey of Legal Needs among Kerby Centre Clients

Clients who completed the post-session survey were asked if they would be willing to complete a follow-up survey regarding their legal needs two to three months later (see Appendix C). Clients who agreed were asked to provide their name and mailing address so that a survey could be sent to them; 104 clients provided their contact information. Approximately 2.5 months after completing the post-session survey, follow-up surveys were sent to consenting clients by the Institute along with an addressed, postage paid return envelope. These surveys collected information on whether the assistance they received during their session helped them to resolve their legal issue, whether they received additional legal advice after their session at the Kerby Centre and, if so, whether their legal issues were resolved as a result of this advice, and whether they had any outstanding legal issues. All surveys received as of December 6,

2013 were included in the sample. A total of 47 follow-up surveys were returned (45.2% of the clients who consented to receiving a follow-up survey).

1.3 Limitations

Certain limitations to the data presented in this report should be noted. Lawyers were asked to complete the Consultation Session Form for each session they conducted during the data collection period; while this form was completed for the substantial majority of sessions, it was not completed for all. It is possible, though unlikely, that the sessions for which data are not available differed in some way from those for which data are available. Further, since completion of the post-session survey was voluntary and all clients who attended a session did not complete a survey, it cannot be assumed that the responses received are representative of all clients who attended the Legal Services Program. Similarly, not all clients who completed a post-session survey consented to receiving a follow-up survey and, of those who did consent, not all completed the follow-up survey. Therefore, it is possible that the follow-up data are not representative either of all Legal Services Program clients, or of those clients who completed the post-session survey. It should be noted, however, that the response rates for both the post-session and follow-up surveys were very high, which substantially increases the likelihood that they are representative samples.

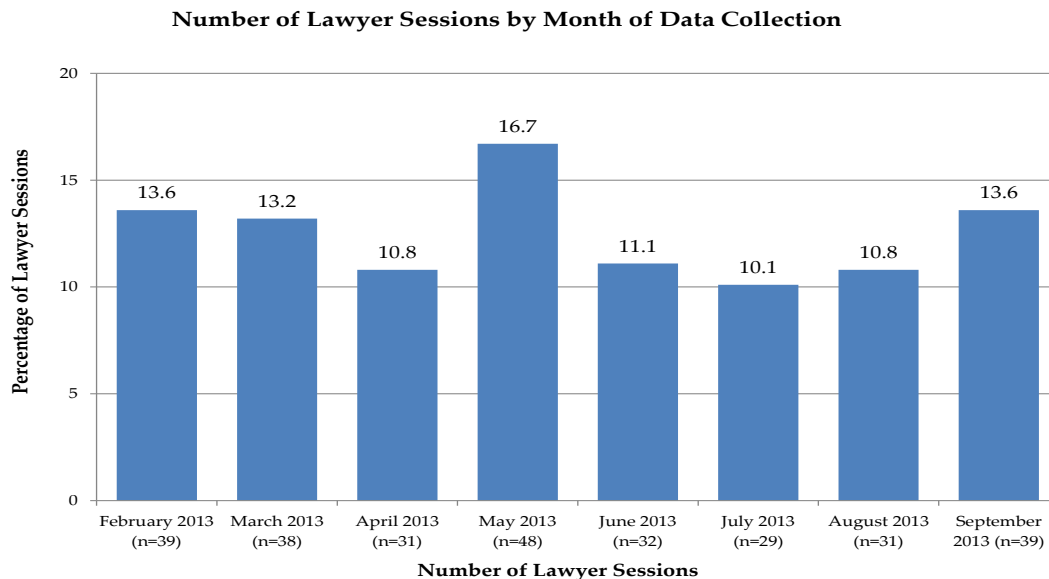
2.0 LAWYER CONSULTATION SESSIONS

During the period of this study, lawyers conducting legal services sessions with Kerby Centre clients were asked to complete a brief form for each session. This form (see Appendix A) collected information on the legal issues discussed, the actions performed by the lawyer on behalf of the client, the length of the session, and whether the lawyer thought that the client was an appropriate referral for the Legal Services Program. Findings from the lawyer session forms are summarized in this chapter.

2.1 Number of Lawyer Consultation Sessions

According to program records, during the period February-September 2013, the Information Office at the Kerby Centre received 899 telephone calls from clients seeking legal information. These included calls from clients seeking to book an appointment for a legal services session, as well as calls from individuals wanting general legal information that did not require direct contact with a lawyer. Out of these calls, a total of 287 legal services sessions were completed. Figure 2.1 presents a breakdown of the number of sessions held during each month of the study. The number of sessions completed was relatively consistent for each month, with an average of 36 per month. The greatest number of sessions was conducted in May (n=48), while the fewest sessions were conducted in July (n=29). Lawyers completed a total of 242 legal session forms during the period of this study from February 6, 2013 to September 12, 2013, and this is the sample reported on in this chapter.

Figure 2.1



Source of data: Kerby Centre Program Records
Total N = 287

2.2 Legal Issues Discussed during Lawyer Consultation Sessions

Lawyers were asked to record which issues they discussed with clients during their consultation sessions and a summary of the findings is presented in Table 2.1. The most common issue discussed in over one-third of sessions for which forms were completed was a will (36.8% of sessions), followed by a power of attorney (21.9%) and a personal directive (19.8%). Other issues that were discussed in over one-tenth of sessions were estate (12%), property/housing (11.2%), and family law (10.7%).

Table 2.1

Legal Issues Discussed during Lawyer Consultation Sessions

Issues Discussed	n	% ¹
Will	89	36.8
Power of Attorney	53	21.9
Personal Directive	48	19.8
Estate	29	12.0
Property/Housing	27	11.2
Family law	26	10.7
Financial issues/Insurance	21	8.7
Civil law/Personal injury	19	7.9
Document execution/Notary	12	5.0
Landlord/Tenant	7	2.9
Capacity/Trusteeship	6	2.5
Immigration	5	2.1
Pension	3	1.2
Criminal law	1	0.4
Health care	1	0.4
Other	3	1.2

Source of data: Lawyer Consultation Session Forms

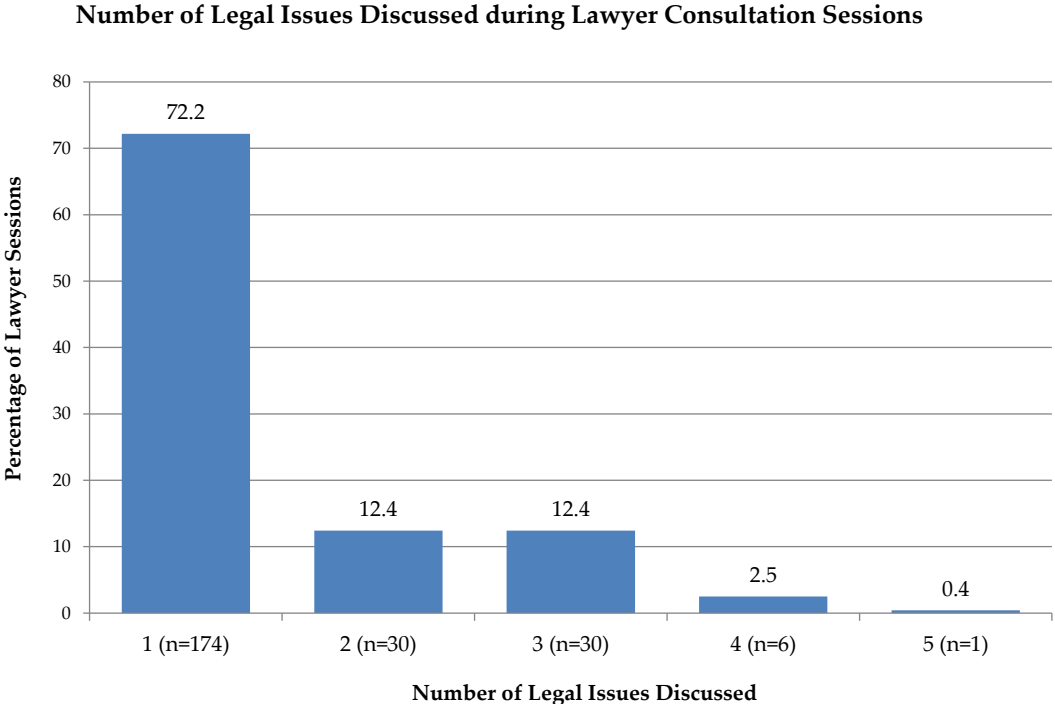
Total N=242

Multiple response data (i.e., lawyers could discuss more than one issue per session).

¹Percentages are based on number of sessions for which forms were completed (N=242).

Lawyers were asked to indicate whether more than one issue was discussed in a session; on average, 1.4 legal issues were discussed per session. Figure 2.2 presents a breakdown of the number of issues discussed. Almost three-quarters of sessions involved discussion of a single issue (72.2%). An equal proportion of cases dealt with two or three issues (12.4% each), while few sessions covered four (2.5%) or five (0.4%) issues.

Figure 2.2



Source of data: Lawyer Consultation Session Forms
 Total N = 242; Missing cases = 1 (i.e., for one session, the lawyer did not provide information on the issues discussed)

2.3 Actions Taken during Lawyer Consultation Sessions

Lawyers were asked to record the actions that were taken during each legal consultation session, and their responses are presented in Table 2.2. The most common action, taken in almost one-half of sessions, was the provision of advice (49.2% of sessions), followed by referral to a private lawyer (20.2%), referral to another agency (19.4%), or a follow-up appointment at Calgary Legal Guidance (16.9%). Other actions were each reported in less than 10% of cases.

More than one action could be reported by lawyers for each session; an average of 1.2 actions were taken per session. Figure 2.3 presents the number of actions taken per session. In the substantial majority of sessions, only one action was reported

(73.4%). Two actions were reported in one-quarter of sessions (25.3%) and three actions were reported in only 1.3% of sessions.

Table 2.2

Actions Taken during Lawyer Consultation Sessions

Actions	n	% ¹
Advice	119	49.2
Lawyer referral	49	20.2
Agency referral	47	19.4
Calgary Legal Guidance Follow-up	41	16.9
Certified/Executed documents	16	6.6
Draft/Review documents	7	2.9
Information	7	2.9
No action required	1	0.4
Other	6	2.5

Source of data: Lawyer Consultation Session Forms

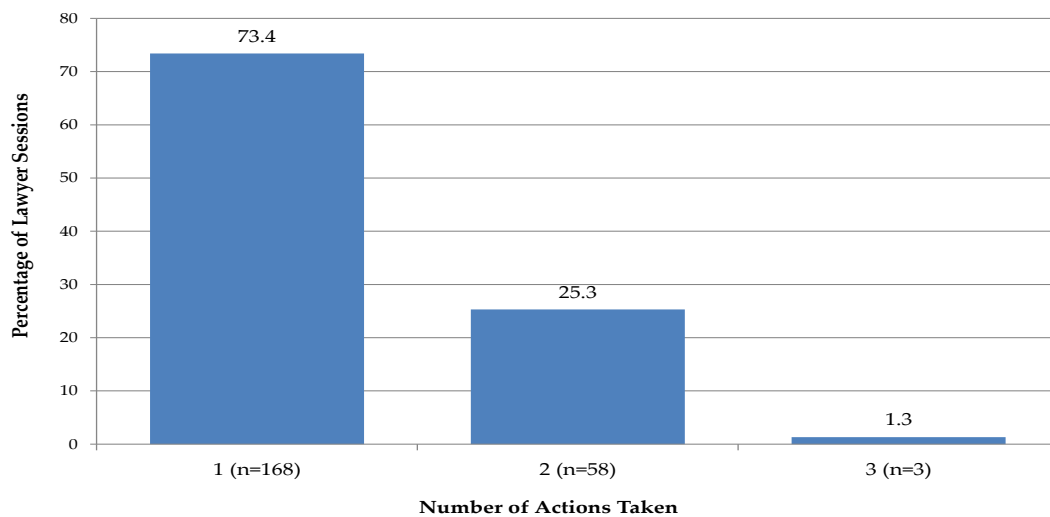
Total N=242

Multiple response data

¹Percentages are based on number of sessions (N=242).

Figure 2.3

Number of Actions Taken during Lawyer Consultation Sessions



Source of data: Lawyer Consultation Session Forms

Total N = 242; Missing cases = 13 (i.e., for 13 sessions, no indication of the actions taken was provided)

2.4 Length of Lawyer Consultation Sessions

Lawyers were asked to record how long they spent with each client during a consultation session. Sessions ranged from 5 to 45 minutes in length, with an average of 20 minutes. The majority of sessions were 15 minutes (22.6%), 20 minutes (33%), or 25 minutes (16.1%) in length.

2.5 Appropriateness of Referrals for Lawyer Consultation Sessions

Lawyers were asked to indicate whether they thought that the referral for each session was appropriate for the Kerby Centre's Legal Services Program. For the substantial majority of sessions (87.4%), lawyers stated that they thought the referral was appropriate.

3.0 SURVEY OF LEGAL NEEDS AMONG KERBY CENTRE CLIENTS

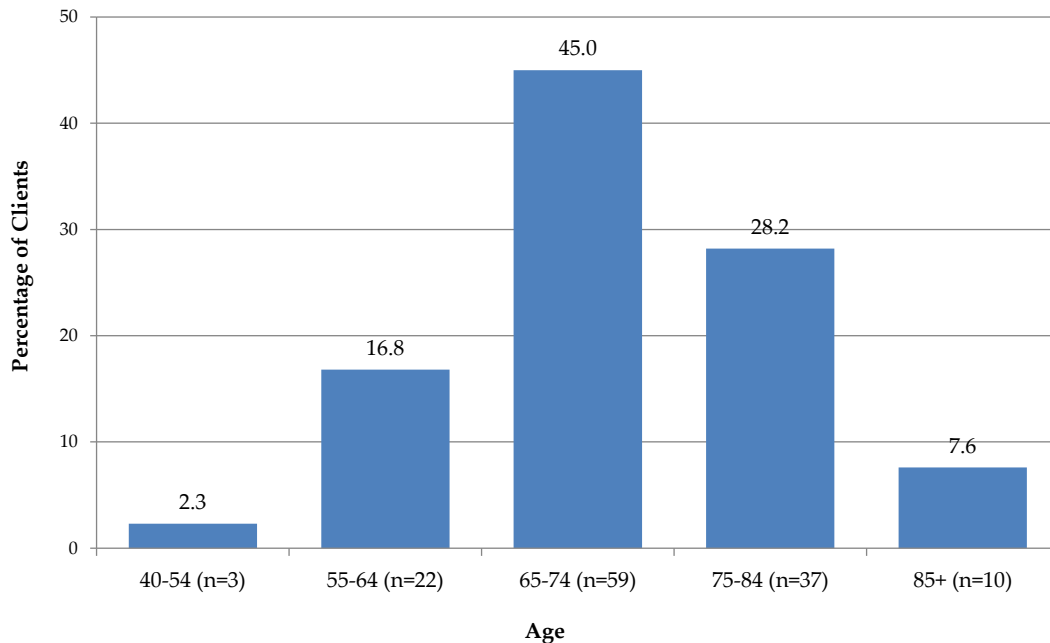
Clients who attended a legal consultation session during the period February 6 through September 12, 2013 were asked to complete a brief survey (see Appendix B) regarding their legal needs, whether the consultation session met those needs, and their level of satisfaction with the legal services they received from the lawyer at the Kerby Centre. A total of 133 completed surveys were received and findings are presented in this chapter.

3.1 Client Characteristics

Two-thirds of the clients who completed the survey were female (66.2%). Figure 3.1 presents the clients' ages. The majority of clients were aged 65-74 (45%) or 75-84 (28.2%) years. Clients ranged in age from 40 to 95 years with an average age of 72.1 years.

Figure 3.1

Age of Clients



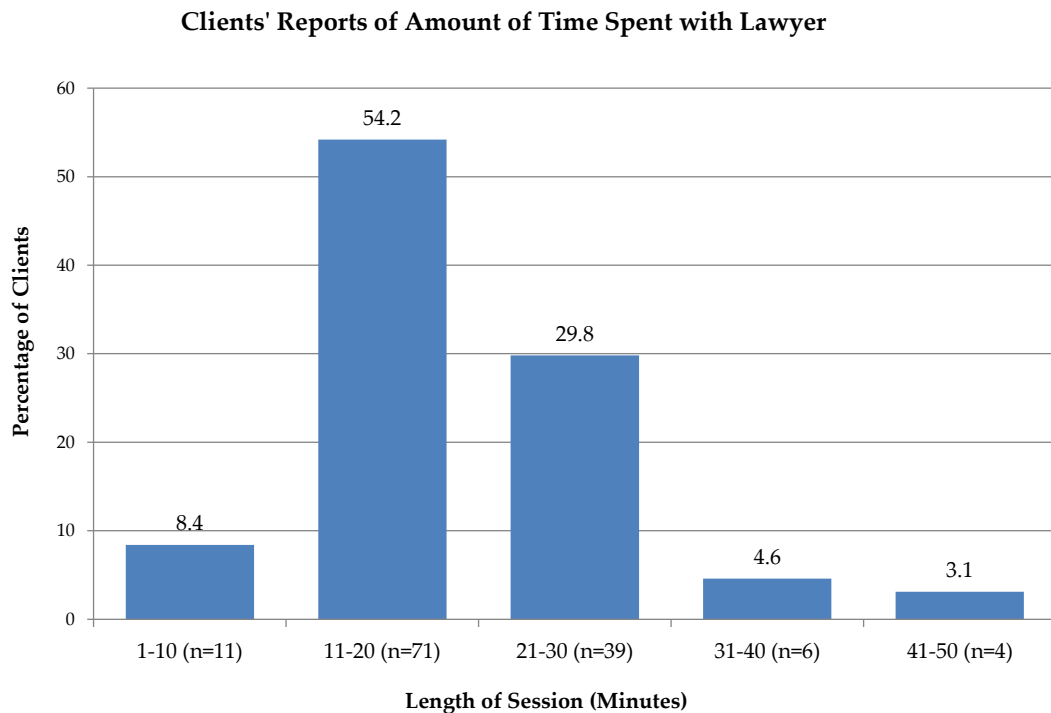
Source of data: Survey of Legal Needs among Kerby Centre Clients
Total N = 133; Missing cases = 2

3.2 Characteristics of Lawyer Consultation Sessions

Kerby Centre legal services clients were asked a number of questions regarding their lawyer consultation session including the length of time they spent with the lawyer, their reasons for meeting with the lawyer, and whether they received the help they needed.

Figure 3.2 presents the duration of the lawyer consultation sessions. Consistent with the length of the sessions reported by the lawyers, clients reported that sessions ranged from 5 to 50 minutes in length, with an average meeting length of 22.3 minutes. The majority of sessions ranged from 11-20 minutes (54.2%) or 21-30 minutes (29.8%) in length.

Figure 3.2



Source of data: Survey of Legal Needs among Kerby Centre Clients
Total N = 133; Missing cases = 2

Clients were asked their reasons for meeting with the lawyer and their responses are presented in Table 3.1. The most common reason for the session was to seek assistance in preparing a will (41.4% of clients), followed by assistance with a power of attorney (27.1%), assistance with a personal directive (26.3%), and help with estate

planning (13.5). Other reasons for meeting with the lawyer were each provided by less than 10% of clients.

Table 3.1

Clients' Reasons for Meeting with Lawyer

Reason for Meeting	n	%¹
Will	55	41.4
Power of Attorney	36	27.1
Personal Directive	35	26.3
Estate planning	18	13.5
Property/Housing	10	7.5
Family law	10	7.5
Civil law/Personal injury	10	7.5
Financial issues/Insurance	8	6.0
Landlord/Tenant	4	3.0
Document execution/Notary	4	3.0
Capacity/Trusteeship	2	1.5
Immigration	2	1.5
Criminal law	2	1.5
Pension	1	0.8
Civil law and Criminal law	1	0.8
Other	1	0.8

Source of data: Survey of Legal Needs among Kerby Centre Clients

Total N=133

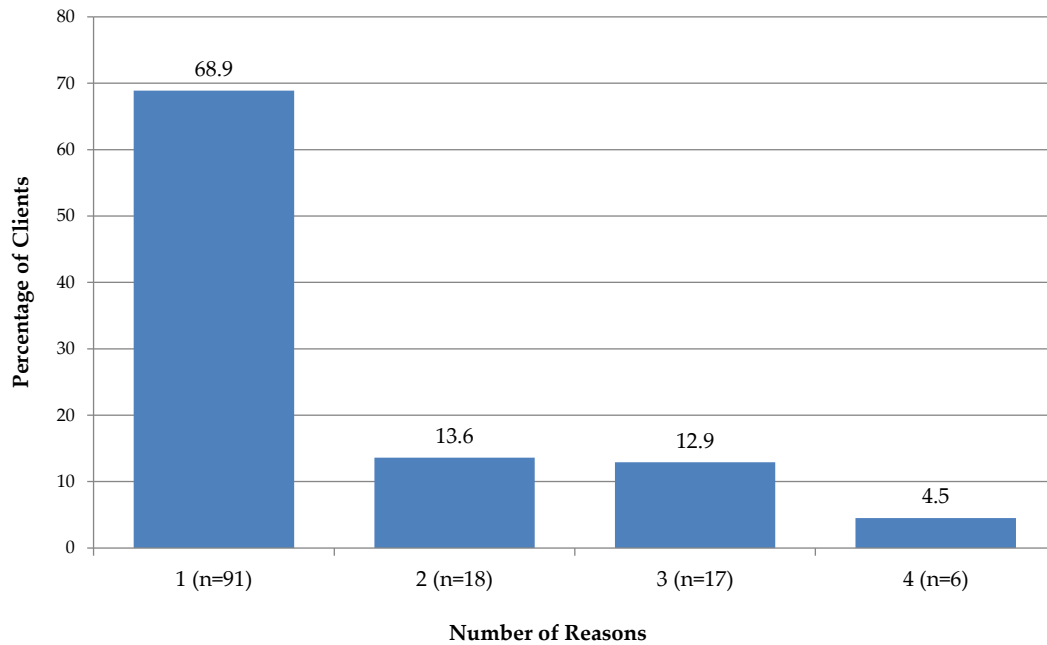
Multiple response data

¹Percentages are based on number of clients (N=133).

Clients could provide more than one reason for the meeting and Figure 3.3 presents the number of issues for which they were seeking assistance. On average, clients were each seeking assistance with 1.5 legal issues. Over two-thirds of clients were looking for help with a single issue (68.9%), while 13.6% needed assistance with two issues and 12.9% wanted help with three issues. Few clients (4.5%) reported that they needed assistance with four legal issues.

Figure 3.3

Number of Reasons for Meeting with Lawyer



Source of data: Survey of Legal Needs among Kerby Centre Clients
 Total N = 133; Missing cases = 1

Clients were then asked if the lawyer provided them with the advice that they needed and their responses are provided in Table 3.2. The vast majority of respondents said that they did receive the advice they were looking for (94.6%), while 4.6% said that they partially received the advice they needed; only one client said that they did not get the advice they wanted.

Table 3.2

Clients’ Opinions of Whether Lawyer Provided the Advice They Needed

Advice Provided	n	%
Yes	123	94.6
Partially	6	4.6
No	1	0.8
Total	130	100.0

Source of data: Survey of Legal Needs among Kerby Centre Clients
 Total N = 133
 Missing Cases=3

Clients who said that the lawyer provided them with the advice they needed were asked how the lawyer helped them and their responses are presented in Table 3.3. The most common responses were that the lawyer provided them with advice on the next step (67.4%), that the lawyer helped them to make a will (20.9%), and that they were provided with a referral to another lawyer (19.4%).

Table 3.3

Clients' Responses Regarding How the Lawyer Helped Them

How Lawyer Helped	n	%¹
Advice on next step	87	67.4
Helped make a will	27	20.9
Provided referral to another lawyer	25	19.4
Helped with a Personal Directive	20	15.5
Helped with a Power of Attorney	19	14.7
Provided referral to another agency	18	14.0
Information	8	6.2
Drafted/Reviewed documents	8	6.2
Certified/Executed documents	4	3.1

Source of data: Survey of Legal Needs among Kerby Centre Clients

This question was only asked of clients who said that the lawyer provided the advice they needed (n=129).

¹Percentages are based on number of clients (n=129).

Multiple response data

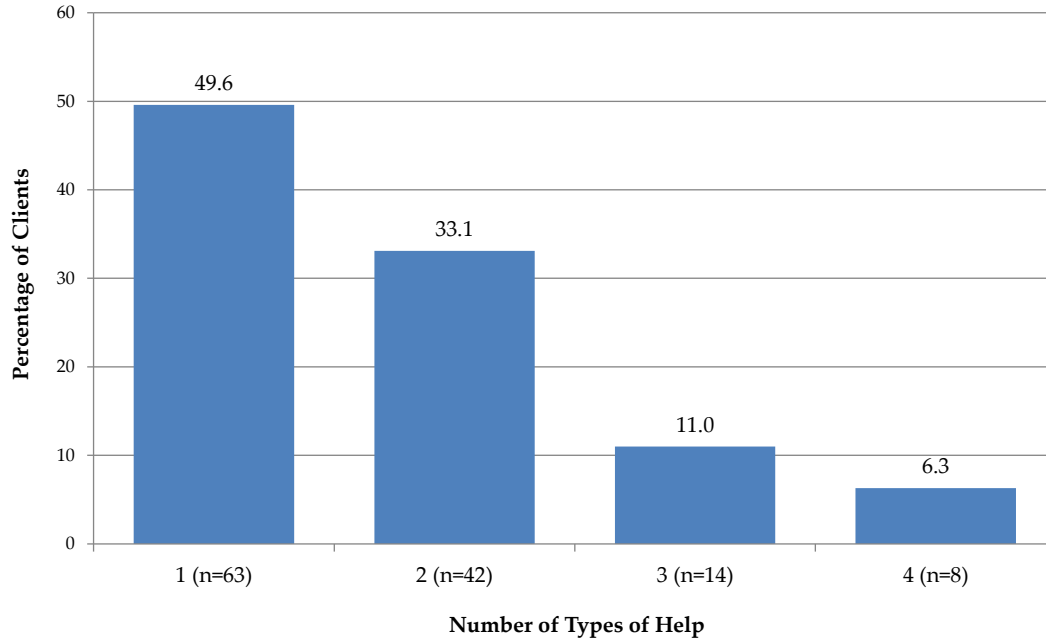
Clients could indicate that the lawyer provided them with help in more than one way; on average, Figure 3.4 presents the number of types of assistance respondents reported receiving. One-half of clients (49.6%) said that they received one type of assistance, while one-third (33.1%) received two and 11% received three different types of assistance. On average, clients said that they received 1.7 types of assistance.

3.3 Other Legal Needs

Clients were asked if they have any legal needs other than the ones that they discussed at their Kerby Centre legal consultation session for which they require legal advice or services. Almost one-third of respondents (29.2%) indicated that they have other legal needs.

Figure 3.4

Number of Types of Help Lawyer Provided



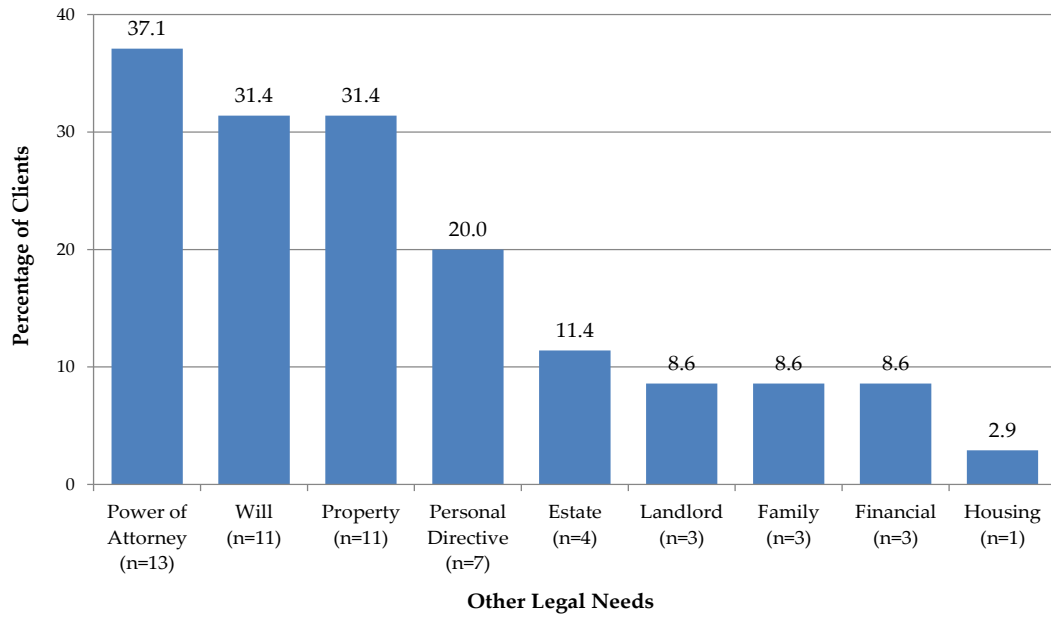
Source of data: Survey of Legal Needs among Kerby Centre Clients
Only includes clients who said that the lawyer provided the advice they needed (n=129); Missing cases = 2

When asked what other legal needs they have, the 35 clients with additional needs mentioned 56 specific needs (an average of 1.6 needs per client). Figure 3.5 summarizes the specific needs mentioned. The most common need, mentioned by 37.1% of respondents, was a power of attorney, followed by assistance with a will (31.4%) and assistance with a property matter (31.4%).

Figure 3.6 presents the number of other legal needs clients reported. The majority indicated that they have one additional legal need (60%), while 22.9% said that they have two needs and 11.4% said that they have three needs.

Figure 3.5

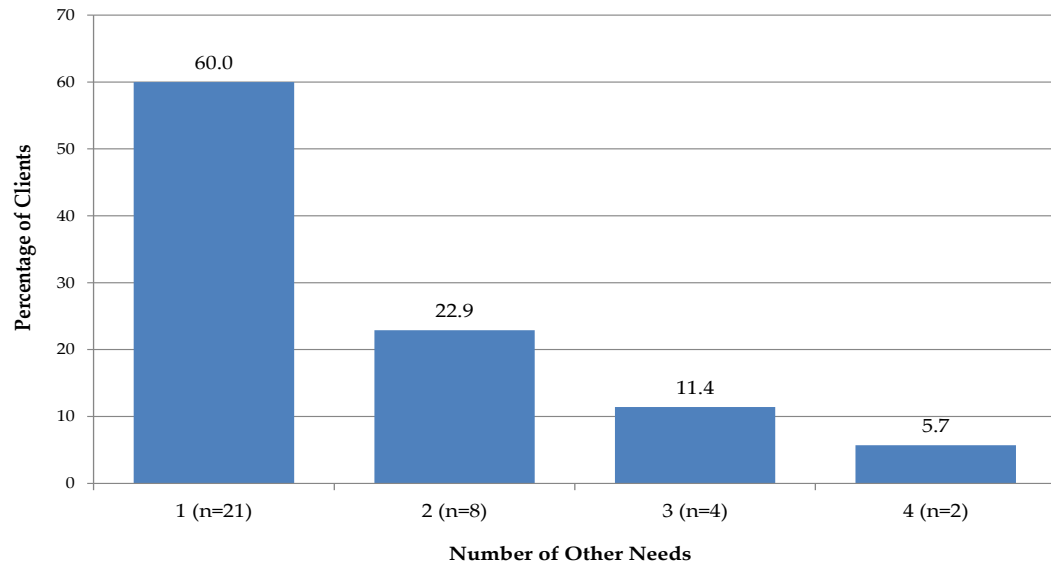
Other Legal Needs Clients Report Having



Source of data: Survey of Legal Needs among Kerby Centre Clients
Only includes clients who said that they had other legal needs (n=35)
Multiple response data; Percentages are based on number of clients (n=35)

Figure 3.6

Number of Other Legal Needs Clients Report Having



Source of data: Survey of Legal Needs among Kerby Centre Clients
Only includes clients who said that they had other legal needs (n=35)

3.4 Clients' Satisfaction with the Services Received

Finally, clients were asked to rate their level of satisfaction with their experience with the lawyer (see Figure 3.7). Satisfaction ratings were extremely positive, with 71.3% of clients stating that they were very satisfied and 25.4% indicating that they were satisfied. Only three clients said that they were either dissatisfied or very dissatisfied, and one client did not have an opinion.

Figure 3.7



Source of data: Survey of Legal Needs among Kerby Centre Clients
Total N=133; Missing cases = 11

4.0 FOLLOW-UP SURVEY OF LEGAL NEEDS AMONG KERBY CENTRE CLIENTS

Kerby Centre legal services clients who completed the post-session survey were asked if they would be willing to complete a follow-up survey (see Appendix C) in two to three months to gather information on the current status of their legal needs. The follow-up survey asked if the services they received at the Kerby Centre helped them to resolve their legal issue, whether they obtained additional legal advice after their session at the Kerby Centre and, if so, whether their legal issue was resolved as a result of the additional legal advice they obtained.

If they agreed to complete the follow-up survey, clients were asked to provide their name and mailing address so that the survey could be sent to them along with a postage-paid envelope to encourage returning the survey to the Institute. Out of the 133 clients who completed the initial survey, 104 (78.2%) agreed to complete the follow-up and provided their contact information. Follow-up surveys were sent to these clients approximately 2.5 months after their lawyer consultation session and all surveys received as of December 6, 2013 were included in the sample. Completed surveys were received from 47 clients, representing a response rate of 45.2% of clients who agreed to complete the follow-up. This chapter presents a summary of the findings from these surveys.

4.1 Client Characteristics

Almost two-thirds of clients who completed the follow-up survey were female (63.8%). Respondents ranged in age from 40 to 89 years with an average age of 72.9 years. The majority of clients were aged 65-74 (34.8%) or 75-84 (34.8%) years (see Figure 4.1).

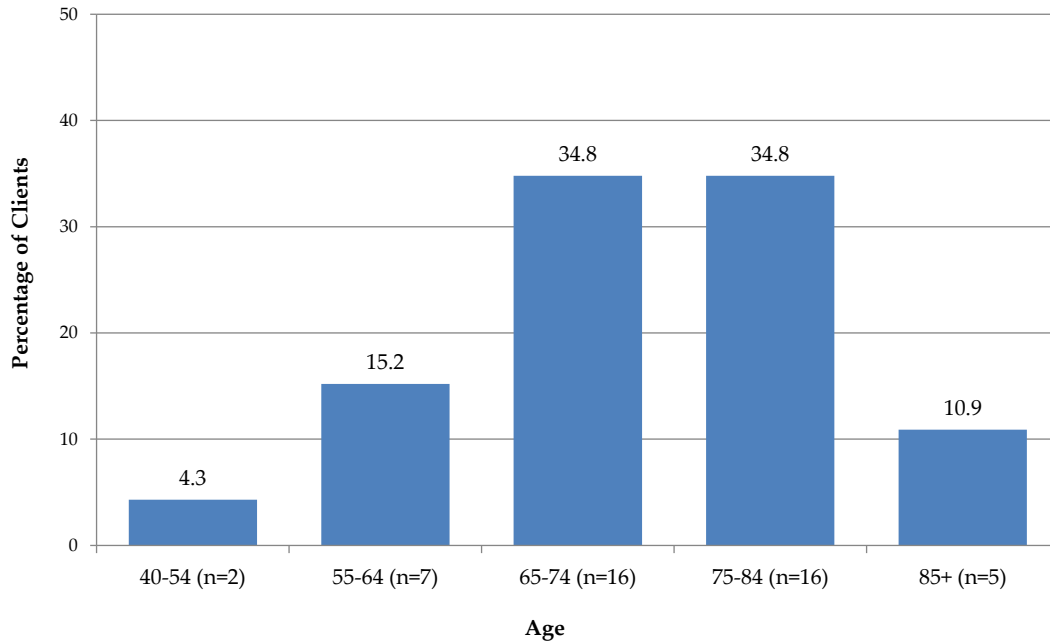
4.2 Clients' Experiences with the Legal Services Program

The follow-up survey asked clients if the services they received during their lawyer consultation session helped them to resolve their legal issue and if they were happy with the outcome, and their responses are presented in Table 4.1. The substantial majority of respondents said that the services they received helped them to resolve their legal issues (80.9%) and most said that they were happy with the outcome (82.6%). Of the 38 clients who said that the services received helped them to resolve their issue, all but one also said that they were happy with the outcome. Of the nine clients who said

that the services received did not help them resolve their legal issue, seven reported that they were not happy with the outcome.

Figure 4.1

Age of Clients



Source of data: Follow-up Survey of Legal Needs among Kerby Centre Clients
Total N = 47; Missing cases = 1

Table 4.1

Clients' Experiences with the Legal Services Program

Clients' Experiences	n	%
Did the services you received at the Kerby Centre help you to resolve your legal issue?		
Yes	38	80.9
No	9	19.1
Total	47	100.0
Were you happy with the outcome? ¹		
Yes	38	82.6
No	8	17.4
Total	46	100.0

Source of data: Follow-up Survey of Legal Needs among Kerby Centre Clients
Total N=47

¹Missing cases=1

4.3 Use of Other Legal Services

The follow-up survey asked clients if they obtained additional legal advice after their legal consultation session at the Kerby Centre; almost one-half of respondents (44.7%) said that they did get additional advice. Table 4.2 presents how clients said that they obtained this advice.

Table 4.2

How Clients Obtained Additional Legal Advice

Source of Advice	n	%
Calgary Legal Guidance	9	42.9
Private lawyer	6	28.6
Other organization	1	4.8
Other source	3	4.3

Source of data: Follow-up Survey of Legal Needs among Kerby Centre Clients
This question was only asked of clients who indicated that they had received additional advice (n=21).

The most common source of additional advice, given by nine clients, was Calgary Legal Guidance, followed by hiring a private lawyer (n=6). Of the three clients who said that they had used another source of advice, two said that they used the Kerby Centre and one responded that they saw the lawyer from the Legal Service Program in his office at a later time. The one client who said that they received advice from another organization did not provide the name of the organization.

When asked if the other legal advice was affordable for them, the majority of respondents (80%) indicated that it was. Most clients also stated that their legal issue was resolved as a result of the additional advice they obtained (84.2%) and that they were happy with the outcome (82.4%).

Clients who stated that they did not obtain further legal advice after their legal consultation session (n=24) were asked why they did not do so, and their responses are presented in Table 4.3.

Table 4.3

Reasons Why Clients Did Not Obtain Additional Legal Advice

Reason	n	%
I did not need to	16	66.7
I did not know what to do next	3	12.5
I could not afford to	2	8.3
I felt the legal system was too intimidating, and did not want to continue	2	8.3
Other reason	1	4.2

Source of data: Follow-up Survey of Legal Needs among Kerby Centre Clients
This question was only asked of clients who indicated that they did not receive additional legal advice (n=24).

The most common response, provided by two-thirds of clients (66.7%) was that they did not need any further advice; all other reasons were given by relatively few respondents.

4.4 Other Legal Issues

Finally, clients were asked a series of questions regarding whether they have any outstanding legal issues for which they require advice.¹ Slightly over one-third of respondents (38.3%) stated that they do have outstanding issues. Table 4.4 presents the issues for which clients felt they needed additional legal advice. Two-thirds of clients (33.3% each) felt that they needed help with the preparation of a will and a power of attorney, while over one-quarter (27.8%) required assistance with a personal directive. Almost one-half of respondents (44.4%) said that they needed assistance with another issue. These issues included family law matters and civil law suits.

Clients who indicated that they had other legal issues were asked if they will be seeking legal assistance with them, and 11 respondents (61.1%) said that they will and 7 (38.9%) indicated that they will not. Table 4.5 indicates where clients plan to seek additional legal assistance. Equal proportions of clients (54.5%) stated that they would seek assistance from the Kerby Centre and a private lawyer, while 27.3% said that they would go to Calgary Legal Guidance for help. Only one client indicated that they would

¹ It should be noted that these outstanding legal issues could include issues that arose following their initial appointment at the Legal Services Program.

seek assistance from Legal Aid. The one client who said that they will seek assistance from another source stated that they will obtain help in another city.

Table 4.4

Issues for Which Clients Required Additional Legal Advice

Issue	n	%¹
Will	6	33.3
Power of Attorney	6	33.3
Personal Directive	5	27.8
Property	4	22.2
Estate	3	16.7
Other issue	8	44.4

Source of data: Follow-up Survey of Legal Needs among Kerby Centre Clients
This question was only asked of clients who indicated that they required additional legal advice (n=18).

¹Percentages are based on the number of clients who required additional advice (n=18).

Multiple response data

Table 4.5

Where Clients Will Seek Additional Legal Advice

Source of Assistance	n	%¹
Kerby Centre	6	54.5
Private lawyer	6	54.5
Calgary Legal Guidance	3	27.3
Legal Aid	1	9.1
Other source	1	9.1

Source of data: Follow-up Survey of Legal Needs among Kerby Centre Clients
This question was only asked of clients who indicated that they will be seeking additional legal assistance (n=11).

¹Percentages are based on the number of clients who will be seeking additional legal assistance (n=11).

Multiple response data

Clients who said that they would not be seeking further legal assistance (n=7) were asked why this was the case, and their responses are shown in Table 4.6. The most common response, provided by four clients, was that further legal advice would be too expensive to obtain. Other reasons were given by relatively few respondents.

Table 4.6

Reasons Why Clients Will Not Seek Additional Legal Advice

Reason	n	%¹
Too expensive	4	57.1
I don't know where to go	1	14.3
I don't know who to talk to	1	14.3
It is too difficult	1	14.3
Other reason	2	28.6

Source of data: Follow-up Survey of Legal Needs among Kerby Centre Clients
 This question was only asked of clients who indicated that they will not be seeking additional legal assistance (n=7)

¹Percentages are based on the number of clients who will not be seeking additional legal assistance (n=7)

Multiple response data

5.0 SUMMARY AND CONCLUSIONS

The Kerby Centre in Calgary offers the Legal Services Program through which clients can receive a brief, free session with a lawyer who will provide them with assistance such as legal advice and drafting or reviewing documents (e.g., wills, powers of attorney, personal directives). This research project was conducted to provide information about the process and effectiveness of the Legal Services Program.

The study collected information from the participating lawyers regarding the number of sessions conducted, the legal issues discussed during the sessions, and the actions undertaken to assist clients with their legal needs. In addition, clients were asked to complete a brief survey following their session that collected information regarding their legal needs and the extent to which the lawyer addressed those needs, as well as their satisfaction with the assistance they received. Clients were also asked to complete a follow-up mail survey two to three months following their initial session to determine whether they had accessed any other legal services to assist them with their legal needs and whether they had any outstanding legal issues with which they required assistance. This chapter presents a summary of the findings from the three data collection strategies and discusses the conclusions that may be drawn from the findings.

5.1 Summary

5.1.1 Lawyer Consultation Sessions

- During the period February-September 2013 a total of 287 lawyer consultation sessions were conducted with Kerby Centre clients and the data collection forms were completed by the lawyers for 242 of these sessions (84.3%).
- The most common legal issues discussed during the sessions were wills, powers of attorney, and personal directives.
- The most frequent actions undertaken by the lawyers during the sessions were the provision of advice, referral to a private lawyer, or a follow-up appointment at Calgary Legal Guidance.
- Consultation sessions ranged from 5 to 45 minutes in length, with an average length of 20 minutes.

- For the substantial majority of sessions, lawyers reported that they thought the referral was appropriate for the program.

5.1.2 Survey of Legal Needs among Kerby Centre Clients

- The post-session survey was completed by 133 clients of the Legal Services Program.
- Two-thirds of the clients who completed the post-session survey were female and their average age was 72 years.
- The most common reason for booking an appointment with the program was to seek assistance in preparing a will, followed by assistance with a power of attorney, a personal directive, or estate planning.
- Almost all clients reported that they received the advice that they were seeking during their lawyer consultation session.
- When clients were asked how the lawyer had helped them during the session, the most common responses were advice on the next step, assistance in preparing a will, and a referral to another lawyer.
- Almost one-third of clients stated that they have needs other than those discussed during their session for which they require legal assistance. The most common needs mentioned were a power of attorney, a will, and a property matter.
- Clients' level of satisfaction with the services they received from the program was very high, with almost all reporting that they were either very satisfied or satisfied.

5.1.3 Follow-up Survey of Legal Needs among Kerby Centre Clients

- A total of 47 completed follow-up surveys were returned (45.2% response rate).
- Almost two-thirds of respondents were female and their average age was 73 years.

- The substantial majority of respondents stated that the services they received during their lawyer consultation session helped them to resolve their legal issue and most said that they were happy with the outcome.
- Almost one-half of clients said that they had obtained additional legal advice after their session at the Kerby Centre. The most common sources of additional advice were Calgary Legal Guidance and a private lawyer.
- The majority of respondents who had obtained additional legal advice said that it was affordable for them and most said that the additional advice resolved their legal issue and that they were happy with the outcome.
- The most common reason for not seeking additional legal advice was that they did not need to.
- Over one-third of respondents stated that they have outstanding legal issues for which they require advice. The most common outstanding issues were preparation of a will, a power of attorney, or a personal directive.
- Almost two-thirds of respondents who had outstanding legal issues said that they would be seeking legal assistance with them. When asked where they would look for this assistance, equal numbers said the Kerby Centre or a private lawyer.
- Clients who had outstanding legal issues but indicated that they would not be seeking assistance were most likely to say that further legal advice would be too costly.

5.2 Conclusions

The population of older adults in Alberta is expected to increase by more than twice the current population in the next 20 years (Alberta Health, 2013). It is expected that with this aging population there will be a corresponding demand on various systems, including the legal system. As discussed by Rothman and Dunlop (2006), it is anticipated that the legal issues facing this population will increase in “both numbers and complexity” (p. 32), and therefore professionals working with older adults in the community need to be equipped to support older adults in addressing these issues. However, access to legal services may be affected by a number of barriers, including economic, physical, knowledge and communication (Minear & Crose, 1996).

The Kerby Centre has attempted to address issues related to accessibility and affordability of legal services for older adults by offering the Legal Services Program. The Legal Services Program provides opportunities for older adults to receive free legal consultations in a familiar and non-threatening environment. Initially staffed by volunteer lawyers, the popularity of the Legal Services Program resulted in the Kerby Centre establishing a partnership with Calgary Legal Guidance in an effort to enhance the services already provided.

Data regarding the process and effectiveness of the Legal Services Program is important to assessing the sustainability of the program. In addition, as the Kerby Centre and other senior-serving agencies work to coordinate service delivery to older adults in Calgary, it is becoming more important to identify possible needs and gaps in legal services for older adults. Therefore, the Canadian Research Institute for Law and the Family, in partnership with the Kerby Centre, developed a project to collect data from the volunteer and CLG lawyers providing consultations and clients that would examine not only how the Legal Services Program is working, but also the types of legal issues for which they require service, whether the Legal Services Program is able to address these issues (either through direct service or referral), and whether clients' legal issues are being resolved beyond the consultation. The response rate for the lawyer consultation session forms and the client post-session and follow-up surveys was very encouraging, providing useful data for the study.

The demand for the Legal Services Program is evidenced in the tremendous volume of telephone calls to the Information Centre from clients seeking legal information (n=899), as well as the number of legal services sessions completed (n=287) during the period February-September 2013. With regard to the consultations, both the legal session forms completed by the lawyers and the client post-session surveys indicate that there is some flexibility in the amount of time clients have with the lawyer. This is important when considering that nearly one-third of clients presented with multiple issues. It is also important to ensuring that clients understand the information provided and have the resources necessary to move forward with their legal issue following the consultation.

The volunteer and CLG lawyers help clients with a variety of issues, and as mentioned, often discuss multiple issues with clients during their sessions. In particular, the findings indicate that the Legal Services Program offers an important service for personal decision making and the protection of financial assets, as evidenced by the fact that the most common forms of assistance were for wills, powers of attorney, personal directives, estate planning, etc. Decreasing the vulnerability of older adults in this regard may also decrease the likelihood of financial abuse and manipulation.

However, there is also evidence that for clients who spent their consultation discussing other legal issues, many have issues related to personal decision making and financial protection that are outstanding. The follow-up survey also indicated that these continue to be outstanding issues for some clients in the months following their session at Kerby Centre, and that for some, addressing these legal issues might be too costly or difficult and therefore may not be dealt with. This may point to a need for more resources to support older adults in ensuring protections such as wills, personal directives and powers of attorney are in place as they age. Given the overwhelming evidence that personal directives, powers of attorney, wills, and estate planning are common legal issues among older adults, the addition of a clinic or referral service to support the preparation of these may be valuable.

Though personal directives, powers of attorney, wills, and estate planning were the most common issues that the clients presented with, it is important to acknowledge the variety of other issues for which they require legal services. Nearly half of the clients who completed the follow-up survey and who indicated outstanding legal issues stated that these issues were family and civil issues. The diversity of legal needs among older adult clients points to a concurrent need for a diversity of accessible legal services and expertise to address these needs. Connections with a variety of legal service providers for referral are important to ensuring this range of needs is met.

Providing information on next steps and connecting older adult clients with other services in the community is a vital activity carried out by the lawyers given the often intimidating nature of the legal services system for seniors. As a result, half of the clients who answered the follow-up survey continued to obtain assistance with their legal matter following their consultation at the Kerby Centre, and most of these clients felt the additional legal services they obtained were affordable for them. However, there was a small percentage of clients who reported that they did not obtain additional legal advice after their contact with Kerby because they did not know what to do, they couldn't afford to, or the system was too intimidating. Over one-half of those who reported in the follow-up that they have outstanding legal issues indicated that they would not seek legal advice because it is too expensive, do not know where to go or who to talk to for help, or it is too difficult. Thus, the findings indicate that for some older adults, accessibility continues to be an issue and point to a need for further development of the legal services system for older adults in Calgary.

The data indicated that the legal services provided by the Kerby Centre are beneficial for the clients served. A large majority of clients felt they were receiving the assistance they were seeking and they were very satisfied with their consultation. Further, the satisfaction with service extended beyond the immediate session.

Therefore, it is important to recognize the Kerby Centre Legal Services Program as an important and effective service for older adults in Calgary.

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GLOSSARY

CLG: Calgary Legal Guidance

The Institute: Canadian Research Institute for Law and the Family

Missing Cases: Missing cases refers to the number of responses on individual questions that are not available. The most common reason for missing cases in survey data is that the respondent chose not to answer a particular question.

Multiple Response Data: Multiple response data refers to questions in which respondents are allowed to choose more than one answer. In tables where multiple response data are presented, the percentages presented for individual items will total more than 100.

N or n: N refers to the total number of responses received to a survey while n refers to a subset of the total responses that may be selected for specific data analyses. For example, if 100 people respond to a survey, N=100. If 30 of those respondents are female, then n=30 females and n=70 males.

Representativeness: Representativeness refers to the extent to which the responses to a survey can be assumed to accurately reflect the total group of potential respondents.

Response Rate: Response rate refers to the percentage of completed surveys returned out of the total number distributed to potential respondents.

Source of Data: Source of data refers to the survey from which the data presented in a table or figure were derived.

APPENDIX A

LAWYER CONSULTATION SESSION FORM

