

## Section 1: Program Need

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Items marked with an asterisk (\*) are required.

### General Program Info

#### Program Name

*Legal Assistance to Low-Income Persons in Crisis in the Roanoke Valley*

#### Program Description

*Because low-income persons cannot afford the services of attorneys, they are all too often denied meaningful access to our system of justice - in the absence of free legal assistance through a legal aid society such as Blue Ridge Legal Services (BRLS). Without an attorney, any litigant is lost in the legal system, not knowing the law, the procedures, or even the vocabulary. Because poor persons cannot afford attorneys, their poverty effectively locks them out of our justice system, if free legal assistance is not made available. (While the Constitution requires the state to provide a lawyer for a poor person accused of a crime, there is no such guarantee in civil cases.)*

*With a mission of eliminating poverty-based inequities in our civil justice system, BRLS provides free legal assistance in civil matters of critical importance to low-income residents in our service area. Since we can meet only about 20% of the civil legal needs of the poor, we prioritize the legal work we undertake to focus on our clients' most critical legal needs, including access to shelter; access to affordable health care; protecting their income and resources; securing financial support and public benefits; and attacking oppressive or exploitative practices.*

*Utilizing a small legal aid staff together with 100 attorneys volunteering on a pro bono basis, this collaborative program provides free legal assistance in civil matters in issues of most critical importance to the Roanoke Valley's poor.*

#### For which 12 months are you reporting your outcomes and financials?

**Outcome Reporting Start Date** 1/1/2012

**Outcome Reporting End Date** 12/31/2012

#### Amount Requested

**Amount Requested** 27,500

#### Please explain the justification for the amount requested.

*We are requesting \$27,500 from the United Way to help cover the current costs of operating our Roanoke office generally, including both personnel and non-personnel costs. If we were to base our request purely on a pro rata share of our total United Way support equalized to the level of service we provide in the Roanoke Valley vis-a-vis the other 8 United Ways' service areas, we would need to request in excess of \$30,000. This request is an effort to move toward greater United Way "equalization".*

#### 1. What is the overall program goal?

*To ensure that low-income families and individuals in the Roanoke Valley have effective access to high quality legal advice and representation in civil (not criminal) matters of critical importance affecting their ability to be self-sufficient, including such basic needs as shelter, protecting their limited income and resources, accessing sources of financial assistance and public benefits, and attacking conditions that hinder their ability to be economically and socially self-sufficient.*

## **2. How is the program planning to accomplish its goal?**

*Utilizing a small cadre of attorneys and support staff of Blue Ridge Legal Services (BRLS) and the Legal Aid Society of Roanoke Valley (LASRV), together with some 100 or more private attorneys volunteering on a pro bono basis, this collaborative program will provide free legal assistance in civil matters in issues of most critical importance to the Roanoke Valley's poor. Potential clients call our office (staffed by 3.5 FTE employees) to be screened by our intake paralegals to determine if they financially qualify and if their legal problems are appropriate (e.g., not a criminal case or a fee-generating case). If they qualify, they are assisted in one of several mechanisms, depending on the case:*

- Some 125 - 150 clients are assigned to our Pro Bono Hotline, in which 20-30 young volunteer lawyers provide legal advice over the phone.*
- Over 1,200 clients are transferred to the LASRV for their 4 staff attorneys to provide legal assistance. (LASRV does not conduct any intake on its own; this function is performed entirely by BRLS for both organizations.)*
- Some 200 clients are referred to 75 or more volunteer attorneys through our Pro Bono Referral Program, operated in conjunction with local bar associations.*
- Some 400 clients are advised or represented by our Roanoke Office's managing attorney.*

*At a minimum, eligible low-income persons are advised as to their rights and responsibilities under the law. (Many of these, unfortunately, are "under-served" as they would clearly benefit from representation which we cannot provide due to a lack of resources.) Depending on the circumstances, the attorney will provide representation in negotiations and/or litigation in order to forestall the threatened harm to the client, if such legal intervention has a reasonable likelihood of success. In this manner, those poor with the most critical legal problems are provided access to our system of justice, providing them a "level playing field", notwithstanding their poverty.*

## **3. Who is the program intended to serve?**

*Our target population is area low-income households whose income is below 125% of the federal poverty guidelines. According to 2010 census data, there are 32,682 persons living below the poverty line in the United Way's service area. There are another 5,914 persons who fall within 125% of the guidelines and who likewise cannot afford an attorney. However, legal needs studies consistently show that we are able to meet no more than 20% of their civil legal needs due to insufficient resources. We generally turn away twice as many people as we can help. Therefore, among the low-income population we attempt to serve, we focus our efforts on those facing the most critical civil legal problems involving basic needs essential to self-sufficiency.*

## **4. How do you publicize the program/recruit clients?**

*Historically as well as currently, we have always had many more clients than we can serve. The courts, the bar, and various human services agencies are well aware of our services and make referrals to us routinely. We are listed with 211. We maintain a program website, [www.brls.org](http://www.brls.org), as well as a statewide website, [www.valegalaid.org](http://www.valegalaid.org), so that folks using the Internet can learn about the availability of our services. As a result of these efforts, most potential clients are aware of the availability of our services. We certainly have never experienced a dearth of clients. For example, we conducted full intake screening for 2171 applicants calling our Roanoke office during 2012. This didn't include hundreds of others we turned away prior to completing an intake screening due to lack of resources.*

### **5a. How many clients did you have on your waiting list for 2011?**

*Approximately 50 on our no fault divorce list.*

### **5b. If clients were placed on a waiting list, what was their average wait time for 2011?**

*Up to 60 days.*

### **6a. How many clients did you have on your waiting list for 2012?**

*Approximately 15 are on our no fault divorce list.*

### **6b. If clients were placed on a waiting list, what was their average wait time for 2012?**

*Up to 30 days.*

## **7. If there were significant changes in the waiting list or waiting time, please explain:**

*We use a waiting list for divorces when there is no deadline. Because so many legal problems have looming court dates involved, those prospective clients need to be seen quickly or simply told to look elsewhere for assistance. A waiting list does them no good. It is a disservice to keep them hanging, only to find out that they can't get representation. Therefore, we try to schedule folks for at least some advice as soon as possible, or tell them we simply cannot help them. We are pleased to report that we are once again providing at least advice in child custody and child support disputes, cases the legal aid programs in Roanoke had been forced to exclude at various times over the last 2 years in an effort to balance resources with demand.*

## Section 2: Collaboration

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When answering questions in this section, please keep in mind the following definition:

*"Collaboration is a structured, mutually beneficial relationship between two or more organizations that work towards a common goal by sharing resources, responsibility, authority and accountability for achieving results. It is more than agencies cooperating, responding to requests or referring clients. Collaborations demonstrate a jointly-developed structure and process for shared decision-making, problem-solving, communication, planning, allocation of resources, monitoring and evaluating the outcomes and deliverables of the project."*

### 1. Does your program have any active collaborations?

Yes

#### 1b. If not collaborating, please explain.

N/A.

*Please list the 3 most important collaborative agreements you have with other organizations/programs to better serve the clients of this program and the nature of each collaboration. You may combine several organizations into one reporting item if the nature of the collaboration is similar. Click on the help button below for an example. You will be asked to provide documentation supporting these collaborations in the packet attachments.*

*Other important partnerships not captured in this section may be mentioned in Section 6 - Additional Information.*

#### 1. Name of Agency(ies):

Legal Aid Society of Roanoke Valley (LASRV)

#### How is this organization partnering with you?

*BRLS performs intake function for both organizations, and transfers the intake data electronically to LASRV. LASRV does no intake on its own. This allows a single point of entry for low-income clients seeking free civil legal aid. We use shared online intake calendars to schedule client appointments. We also coordinate our delivery of services. In this manner we are able to avoid administrative duplication and maximize efficiency between the two organizations.*

#### How often did this collaboration happen this past year?

Daily

#### How is the client better served as a result of this partnership?

*1212 low-income residents of the Roanoke Valley were screened by BRLS and transferred in 2012 to LASRV, where they received free legal assistance from LASRV's staff attorneys. (LASRV closed 975 cases in 2012 for Roanoke Valley area residents, all of whom were screened and transferred by BRLS.) As a result of this collaboration, clients were provided a single point of entry when seeking free civil legal aid in the Roanoke Valley, minimizing confusion and/or inconvenience to them.*

#### 2. Name of Agency(ies):

*Roanoke Valley Chapter of the Young Lawyers Division (YLD) of the Virginia Bar Association; the Salem-Roanoke Co. Bar; and the Roanoke City Bar*

#### How is this organization partnering with you?

*In collaboration with the Young Lawyers Division (YLD) of the VA Bar Ass'n (VBA), we operate a Pro Bono Hotline in which 25-30 pro bono attorney volunteers alternate manning the phones in the BRLS office one afternoon each week to provide legal advice to low-income residents of the Roanoke Valley. In collaboration with the Roanoke and Salem bars, we operate a Pro Bono Referral Program, in which low-income clients are screened and referred to volunteer attorneys who represent them without charge.*

#### How often did this collaboration happen this past year?

Weekly

#### How is the client better served as a result of this partnership?

*Pro Bono Hotline: 136 low-income residents of the Roanoke Valley area were provided with free legal advice by 26 pro bono attorney volunteers donating a total of 45 hours during 2012, worth approximately \$6740 in donated legal services.*

*Pro Bono Referral Program: an additional 201 low-income residents of the Roanoke Valley area were provided free legal representation in cases closed during 2012 by 75 pro bono attorney volunteers donating over 910 billable hours, worth approximately \$136,572.*

**3. Name of Agency(ies):**

LOA (Local Office on Aging)

**How is this organization partnering with you?**

*A little over three years ago we formed a new collaborative relationship with LOA, under which we provide local elderly clients "in the greatest socio-economic need" with free legal assistance when referred by LOA even though they would not necessarily be strictly eligible for our services under our normal financial guidelines.*

**How often did this collaboration happen this past year?**

*Weekly*

**How is the client better served as a result of this partnership?**

*During 2012 we assisted 134 older adults in the Roanoke Valley, age 60 and older who were screened and referred by LOA under our collaborative agreement. We prepared wills and related documents for the vast majority of these elderly clients. For most of these clients, our attorney went to the LOA office to meet with the clients as a convenience to them. These clients would not have otherwise been able to obtain free legal assistance without the collaboration between BRLS and LOA.*

### **Section 3: Logic Model**

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#### **Overall Program Goal**

*To ensure that low-income families and individuals in the Roanoke Valley have effective access to high quality legal advice and representation in civil (not criminal) matters of critical importance affecting their ability to be self-sufficient, including such basic needs as shelter, protecting their limited income and resources, accessing sources of financial assistance and public benefits, and attacking conditions that hinder their ability to be economically and socially self-sufficient.*

#### **Inputs**

*BRLS staff intake paralegal and halftime BRLS staff intake paralegal*

*BRLS managing attorney in Roanoke office*

*25-30 Pro Bono Hotline attorney volunteers who provide free legal advice*

*4 staff attorneys at Legal Aid Society of Roanoke Valley (LASRV) who provide free legal advice and/or representation*

*BRLS staff paralegal in Roanoke office*

*Approximately 100 local volunteer attorneys accepting referrals through our Pro Bono Referral Program in order to provide free legal assistance to the clients who have been screened and referred.*

*BRLS Executive Director and secretary in Harrisonburg office*

#### **Activities**

*Applicants requesting assistance are screened for eligibility and case type, and eligible clients are set up for appointments with appropriate source of assistance, i.e., the BRLS Managing Attorney, a hotline attorney, a pro bono referral attorney, or an LASRV attorney.*

*Eligible clients are promptly interviewed by attorney and advised, after any needed research, as appropriate.*

*Eligible clients are promptly interviewed by attorney and necessary documents are drafted for the client, as appropriate.*

*Eligible clients are promptly interviewed by attorney and provided with legal representation that involves negotiations and/or litigation in state or federal court or before an administrative agency, as appropriate. This representation may involve interviews of witnesses, legal research, review of documents, drafting of pleadings, discovery, court appearances, and drafting of legal memoranda and briefs, as necessary.*

*Clients are subsequently surveyed to measure the effectiveness of the legal assistance provided.*

#### **Outputs**

*Cases screened for eligibility.*

*Cases opened by BRLS (including those for managing attorney, pro bono hotline attorneys, and pro bono referral attorneys), or transferred to LASRV for assistance.*

*Cases closed as "advice only" cases.*

*Hours of attorney time expended in advice cases.*

*Cases closed by limited service, usually, drafting of documents.*

*Hours of attorney time expended in limited service cases.*

*Cases closed by settlement or court or administrative agency decision.*

*Hours of attorney time expended in extended representation cases.*

*Client surveys completed and returned.*

#### **Outcome(s)**

*Low-income clients with questions about civil legal problems they confront will be provided competent legal advice that they understand; that fully answers their legal questions; and that helps them resolve their legal problems.*

*Indicator(s): Number of clients provided with legal advice by attorneys.*

*Indicator(s): The clients report in their surveys that they understood the advice provided.*

*Indicator(s): The clients report in their surveys that the advice provided fully answered their legal questions.*

*Indicator(s): The clients report in their surveys that the legal advice provided helped them resolve their legal problems.*

### **Section 3: Logic Model**

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*Clients will have their legal problems successfully resolved through the provision of free legal representation in negotiations and/or litigation.*

*Indicator(s): The number of clients who were represented by attorneys in negotiations and/or litigation through the conclusion of the dispute.*

*Indicator(s): Success rates, i.e., the percentage of cases in which we achieved our client's goals in the negotiations and/or litigation; partially achieved the client's goals; or did not achieve our client's goals.*

*Indicator(s): The specific positive legal outcome achieved for the client, if any, aggregated by common outcomes.*

*Indicator(s): The financial benefits, if any, achieved for the client, either as a positive lump sum or monthly recovery, or the liability or cost avoided.*

*Indicator(s): Overall client satisfaction rating of the services they received, with a goal of receiving a rating of "very good" or "excellent".*

### Section 3: Logic Model

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Use the drop-down box to set up each section of the logic model. Items will be removed from the drop-down and populate at the bottom once initial information is provided. Use the arrows on the left to change the order that items appear for each section. Click the "edit" to make changes to the description for each section. Click on the "numbers and %" in the Outcome section to report on each indicator listed. Questions related to the data source and data collection method will be under this sub-section. Please check that all parts of the logic model are filled out before it is verified. Please refer to the Resource Center for detailed instructions and examples.

#### Overall Program Goal

*To ensure that low-income families and individuals in the Roanoke Valley have effective access to high quality legal advice and representation in civil (not criminal) matters of critical importance affecting their ability to be self-sufficient, including such basic needs as shelter, protecting their limited income and resources, accessing sources of financial assistance and public benefits, and attacking conditions that hinder their ability to be economically and socially self-sufficient.*

#### Inputs

*BRLS staff intake paralegal and halftime BRLS staff intake paralegal*

*BRLS managing attorney in Roanoke office*

*25-30 Pro Bono Hotline attorney volunteers who provide free legal advice*

*4 staff attorneys at Legal Aid Society of Roanoke Valley (LASRV) who provide free legal advice and/or representation*

*BRLS staff paralegal in Roanoke office*

*Approximately 100 local volunteer attorneys accepting referrals through our Pro Bono Referral Program in order to provide free legal assistance to the clients who have been screened and referred.*

*BRLS Executive Director and secretary in Harrisonburg office*

#### Activities

*Applicants requesting assistance are screened for eligibility and case type, and eligible clients are set up for appointments with appropriate source of assistance, i.e., the BRLS Managing Attorney, a hotline attorney, a pro bono referral attorney, or an LASRV attorney.*

*Eligible clients are promptly interviewed by attorney and advised, after any needed research, as appropriate.*

*Eligible clients are promptly interviewed by attorney and necessary documents are drafted for the client, as appropriate.*

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*Eligible clients are promptly interviewed by attorney and provided with legal representation that involves negotiations and/or litigation in state or federal court or before an administrative agency, as appropriate. This representation may involve interviews of fact witnesses, legal research, review of documents, drafting of pleadings, discovery, court appearances, and drafting of legal memoranda and briefs, as necessary.*

*Clients are subsequently surveyed to measure the effectiveness of the legal assistance provided.*

**Outputs**

*Cases screened for eligibility.*

**Current and Target Output(s)****Output Numbers**

*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Outputs	2,171	2,500

*Cases opened by BRLS (including those for managing attorney, pro bono hotline attorneys, and pro bono referral attorneys), or transferred to LASRV for assistance.*

**Current and Target Output(s)****Output Numbers**

*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Outputs	1,937	2,250

*Cases closed as "advice only" cases.*

**Current and Target Output(s)****Output Numbers**

*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Outputs	1,004	1,100



**Section 3: Logic Model***Hours of attorney time expended in advice cases.***Current and Target Output(s)****Output Numbers***Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Outputs	475	500

*Cases closed by limited service, usually, drafting of documents.***Current and Target Output(s)****Output Numbers***Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Outputs	299	300

*Hours of attorney time expended in limited service cases.***Current and Target Output(s)****Output Numbers***Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Outputs	380	400

*Cases closed by settlement or court or administrative agency decision.***Current and Target Output(s)****Output Numbers***Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Outputs	427	450

**Section 3: Logic Model**

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*Hours of attorney time expended in extended representation cases.*

**Current and Target Output(s)**

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**Output Numbers**

*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Outputs	4,682	4,750

*Client surveys completed and returned.*

**Current and Target Output(s)**

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**Output Numbers**

*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Outputs	50	60

**Outcome(s)**

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**Outcome Statement**

*Low-income clients with questions about civil legal problems they confront will be provided competent legal advice that they understand; that fully answers their legal questions; and that helps them resolve their legal problems.*

**Indicator(s)**

*Number of clients provided with legal advice by attorneys.*

**Indicator Questions**

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**Indicator Narratives****Source: State from what source you collected your Indicator data**

*This data is recorded, tracked, and compiled in our case management databases. Note that this is a hybrid of an output and an outcome, but we have chosen to include it here as an outcome per se for informative purposes and to serve as a foundation for our other related outcomes.*

**Data Collection: Describe your data collection methods**

*This data is entered into our computer-based database at the time a case is closed, based on information provided in our case closing memo, which is completed for every closed case.*

**Section 3: Logic Model**

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**Current and Target**

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*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

**Measurements**

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Clients Measured	1,003	1,100
# of Clients Achieving	1,003	1,100
Achievement Percentage	100	100

**Indicator(s)**

*The clients report in their surveys that they understood the advice provided.*

**Indicator Questions**

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**Indicator Narratives**

**Source: State from what source you collected your Indicator data**

*This data is gleaned from the responses we receive in our surveys mailed to clients.*

**Data Collection: Describe your data collection methods**

*We mail out surveys at the close of each month at random to 60 clients across our entire program who have been provided advice during that month. We enter the responses received into our computer-based case management database. Because the responses are tied to the particular client in the database, we are then able to analyze responses aggregated by locality, legal problem type, demographics, attorney, etc.*

**Current and Target**

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*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

**Measurements**

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Clients Measured	19	25
# of Clients Achieving	18	20
Achievement Percentage	94.74	80

**Indicator(s)**

*The clients report in their surveys that the advice provided fully answered their legal questions.*

**Section 3: Logic Model**

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**Indicator Questions**

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**Indicator Narratives****Source: State from what source you collected your Indicator data***This data is gleaned from the responses we receive to our client surveys.***Data Collection: Describe your data collection methods***We mail out surveys at the close of each month at random to 60 clients across our entire program who have been provided advice during that month. We enter the responses received into our computer-based case management system.***Current and Target**

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*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.***Measurements**

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Clients Measured	19	25
# of Clients Achieving	15	18
Achievement Percentage	78.95	72

**Indicator(s)***The clients report in their surveys that the legal advice provided helped them resolve their legal problems.***Indicator Questions**

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**Indicator Narratives****Source: State from what source you collected your Indicator data***This data is gleaned from the responses we receive to our client surveys.***Data Collection: Describe your data collection methods***We mail out surveys at the close of each month at random to 60 clients across our entire program who have been provided advice during that month. We enter the responses received into our computer-based case management system.***Current and Target**

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*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.***Measurements**

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Clients Measured	19	25
# of Clients Achieving	14	18
Achievement Percentage	73.68	72

**Section 3: Logic Model**

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**Outcome Statement**

*Clients will have their legal problems successfully resolved through the provision of free legal representation in negotiations and/or litigation.*

**Indicator(s)**

*The number of clients who were represented by attorneys in negotiations and/or litigation through the conclusion of the dispute.*

**Indicator Questions**

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**Indicator Narratives****Source: State from what source you collected your Indicator data**

*This data is recorded, tracked, and compiled in our computer-based case management system. Note that this is a hybrid of an output and an outcome, but we have chosen to include it here as an outcome per se for informative purposes and as a foundation for our related outcomes.*

**Data Collection: Describe your data collection methods**

*This data is entered into our computer-based case management database at the time a case is closed (that is, concluded), based on information provided in our case closing memo, which is completed for every closed case.*

**Current and Target**

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*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

**Measurements**

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Clients Measured	409	425
# of Clients Achieving	409	425
Achievement Percentage	100	100

**Indicator(s)**

*Success rates, i.e., the percentage of cases in which we achieved our client's goals in the negotiations and/or litigation; partially achieved the client's goals; or did not achieve our client's goals.*

**Indicator Questions**

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**Indicator Narratives****Source: State from what source you collected your Indicator data**

*This evaluation is performed by the casehandler at the time the case is closed, and reviewed by the managing attorney or executive director. The results achieved in the case, as reflected in a court decision or negotiated agreement, for example, are compared with the client's goals we had undertaken to pursue when we opened the case. (These goals are set out in written representation agreements signed by the casehandler and the client at the onset of the representation.)*

**Data Collection: Describe your data collection methods**

*This data is recorded in the case closing memo that is completed by the casehandler when a case is closed. The results are entered into our computer-based case management system.*

**Section 3: Logic Model**

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**Current and Target**

*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

**Measurements**

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Clients Measured	409	425
# of Clients Achieving	380	340
Achievement Percentage	92.91	80

**Indicator(s)**

*The specific positive legal outcome achieved for the client, if any, aggregated by common outcomes.*

**Indicator Questions**

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**Indicator Narratives****Source: State from what source you collected your Indicator data**

*This information is recorded by the casehandler at the time the case is closed, using a statewide set of over 200 common legal aid outcomes developed by a national expert on legal aid outcomes reporting. Highlights of the specific outcomes achieved include:*

*17 clients obtained bankruptcy discharges  
 1 client had debt collection activities against them stopped  
 6 deficiency judgments were successfully defended against  
 12 garnishments were quashed  
 3 illegal sales contracts were set aside  
 1 fraudulent practice was successfully challenged  
 1 predatory lending practice was successfully challenged  
 1 adoption was granted  
 13 clients were awarded child custody  
 264 clients were granted divorces  
 12 guardianships were approved  
 6 clients received court orders of protection against abusers  
 25 wrongful evictions were stopped  
 2 foreclosures were stopped  
 substandard housing conditions remedied for 1 client  
 10 clients were awarded unemployment benefits contested by their former employers*

**Data Collection: Describe your data collection methods**

*This data is recorded in the case closing memo completed by the casehandler when a case is closed. The results are entered into our computer-based case management database, using a comprehensive list of over 200 outcome codes developed for Virginia legal aid programs by a national legal aid outcomes expert.*

**Section 3: Logic Model**

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**Current and Target**

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*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

**Measurements**

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Clients Measured	409	425
# of Clients Achieving	380	340
Achievement Percentage	92.91	80

**Indicator(s)**

*The financial benefits, if any, achieved for the client, either as a positive lump sum or monthly recovery, or the liability or cost avoided.*

**Indicator Questions**

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**Indicator Narratives****Source: State from what source you collected your Indicator data**

*This information is recorded by the casehandler at the time the case is closed, capturing the financial benefits, if any, achieved for the client as a direct result of the representation provided. In 2012, we recovered \$77,159 for Roanoke Valley clients, while defeating or cancelling \$652,461 in claims against Roanoke Valley clients. In addition, we obtained \$4,196 in monthly benefits for Roanoke Valley clients.*

**Data Collection: Describe your data collection methods**

*This data is recorded in the case closing memo that is completed by the casehandler when the case is closed. The results are entered into our computer-based case management database. Some cases (e.g., a simple uncontested no fault divorce decree) may not involve any monetary award or liability. Some cases (e.g., a bankruptcy) may involve the discharge of a liability, while others (e.g., a spousal support petition) may involve a monthly financial award that benefits the client on a recurring basis. So while these financial measurements are significant, they vary from case to case and can be most meaningfully compiled and analyzed on an aggregate basis, as set forth in the paragraph above.*

*Overall, we achieved some direct financial recovery or benefit for 82 Roanoke Valley clients during 2012, as aggregated in the paragraph above.*

**Current and Target**

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*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

**Measurements**

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Clients Measured	409	425
# of Clients Achieving	82	75
Achievement Percentage	20.05	17.65

**Indicator(s)**

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*Overall client satisfaction rating of the services they received, with a goal of receiving a rating of "very good" or "excellent".*

**Indicator Questions**

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**Indicator Narratives**

**Source: State from what source you collected your Indicator data**

*This data is collected from client satisfaction surveys sent out each month to every client provided more than advice whose case was closed the previous month, as well as to 60 random client who received only advice during the previous month. A total of 61 Roanoke Valley clients whose cases were closed during 2012 have returned surveys to date.*

**Data Collection: Describe your data collection methods**

*See paragraph above. Once the client satisfaction survey responses are entered into our case management database, we are able to generate reports on any manner of client demographic or type of case. (We also generate client satisfaction survey reports by attorney and by office, for example.)*

**Current and Target**

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*Current Year Numbers should reflect 12 months of actual data. Target Numbers should reflect numbers to be served with requested funds.*

**Measurements**

	<b>Current Year Numbers</b>	<b>Target Number for Upcoming Year</b>
# of Clients Measured	61	70
# of Clients Achieving	55	63
Achievement Percentage	90.16	90



## Section 4: Additional Information

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*Please use this section to provide the volunteer review panel additional information that you may not have had a chance to fully explain in other sections of the application.*

### **1. Over the last 12 months, what changes have you made to the program to better serve your clients or make the program more efficient?**

*A year ago, as a result of a 20% cut in federal funding for legal aid programs across the country, we were forced to lay off our half-time intake paralegal and our half-time pro bono referral coordinator in our Roanoke office - leaving just the managing attorney, a paralegal/secretary, and one remaining intake paralegal. This amounted to a loss of 25% in our FTE staff in the office.*

*The remaining staff gamely attempted to maintain the same level of service, referrals, and intake as before. They streamlined their in-house pro bono referral procedures and divided those responsibilities across the remaining staff so that our pro bono referral program continues without a hiccup.*

*On the other hand, the loss of the half-time intake paralegal seriously cut into our capacity to process the same number of applicants, creating a serious bottleneck for BRLS and our collaborative partners, who rely upon us for all intake functions. Happily, we received additional funding in the summer of 2012 from the United Way of Roanoke Valley that allowed us to hire a new half-time intake paralegal, who began working in late summer. Within a month or two, he was well-trained and very productive. This was particularly fortunate timing for us, as our highly experienced full-time intake paralegal was diagnosed with a serious health condition and was out on medical leave for about 2 months at the end of the year. Because we now had a second trained intake paralegal, we were able to continue to function as the intake portal for BRLS and our collaborative partners despite her extended absence. Now, she is back at work and we are enjoying the enhanced productivity of having both of them working, eliminating the intake bottleneck that we had experienced last year.*

*As a result of this additional half-time intake paralegal, we expect to see the number of clients we are able to screen and assist in some fashion increase over last year, perhaps returning to our pre-2012 level of services.*

### **2. Over the past 12 months, what were your key challenges? How have you addressed these challenges? What efforts are planned to address continuing challenges?**

*By far, our biggest challenge in the last 12 months was the need to absorb a 20% cut in federal funding, resulting in a program-wide staff reduction of 25%, and a reduction in our overall attorney staff of 33%. Because we have only one attorney in our Roanoke office, we obviously did not cut our attorney staff there, but we were forced to lay off our two half-time staff persons, resulting in a 25% reduction in the total FTE staff in the Roanoke office.*

*However, because of an increase in funding from the United Way of Roanoke Valley last summer, we were able to restore the half-time intake position we had cut at the beginning of the year - a real lifesaver for the office and its work.*

### **3. What other information would you like the Community Investment Panel volunteers to know about the program?**

*Here are some comments we received from Roanoke Valley clients on our client satisfaction surveys during the last year. Their words speak volumes, more than any statistics or facts we could add to our application:*

*"This was very important to me. I got my full income back and you do not know how much that helped."*

*"Legal aid was a great value to me in my situation and I was very pleased with the services I received."*

*"I struggled for 3 years because I could not afford a divorce. Legal aid helped me to get out of a bad situation."*

*"It put my mind at ease by having an updated will."*

*"I was able to give power of attorney to my son to help address my needs and plan for future events."*

*"Everyone was informative, knowledgeable, caring. They made a difficult situation so much easier to go through."*

*"Thanks again for helping me with this positive and life-changing situation."*

*"Couldn't have asked for better people to represent me!"*

*"My case was very important to me. I needed closure from my ex-husband even though we had been separated for approximately 10 years. I felt like the world had been lifted off my shoulders."*



**Section 5: Program Budget**

As you fill out the numbers for this section, please note the following definitions:

Last year actual (July '11 - June '12 if reporting on fiscal year): 12 months of actual audited program expenses  
 Current year budget (July '12 - June '13 if reporting on fiscal year): 12 months estimated program costs. How is funding currently being used?

2013 proposed budget (July '13 - June '14 if reporting on fiscal year): 12 months estimated program costs for upcoming funding year. How are you planning to spend funds being requested?

**Program Revenue**

Please list the sources of revenue for this program. Click on the underlined revenue items to fill out the detail (e.g. Governmental Funding, Other Funding Sources, etc.). Items that roll-up under these categories are displayed in gray (e.g. amounts in Federal, State and Local Government funding automatically total to make up the "Governmental Funding" item on the revenue). Click on the help button for more information about that line item.

Please remember to click one of the "save" icons on the top right of the page or bottom left of the page to activate and refresh the auto-calculated fields.

Description	Last Year Actual	Current Year Budget	2013-2014 Proposed Budget	% Change of Current vs. Proposed
Program Fees, fees for services rendered	5,195.00	5,930.00	5,930.00	0.00
*Governmental Funding:	230,306.00	212,366.00	212,366.00	0.00
<i>Federal</i>				
<i>State</i>				
<i>Unspecified governmental support, grants</i>				
<i>Federal</i>	230,306.00	212,366.00	212,366.00	
<i>State</i>	0.00	0.00	0.00	
<i>Unspecified governmental support, grants</i>	0.00	0.00	0.00	
City of Roanoke Human Services	11,800.00	13,000.00	18,914.00	45.49
*Other Local Government Funding	700.00	800.00	800.00	0.00
<i>City of Roanoke CDBG</i>				
<i>City of Roanoke Arts Commission</i>				
<i>City of Roanoke General Funds</i>				
<i>Roanoke County</i>				
<i>City of Salem</i>				
<i>Craig County</i>				
<i>Botetourt County</i>				
<i>City of Roanoke CDBG</i>	0.00	0.00	0.00	
<i>City of Roanoke Arts Commission</i>	0.00	0.00	0.00	
<i>City of Roanoke General Funds</i>	0.00	0.00	0.00	

**Section 5: Program Budget****Program Revenue**

Please list the sources of revenue for this program. Click on the underlined revenue items to fill out the detail (e.g. Governmental Funding, Other Funding Sources, etc.). Items that roll-up under these categories are displayed in gray (e.g. amounts in Federal, State and Local Government funding automatically total to make up the "Governmental Funding" item on the revenue). Click on the help button for more information about that line item.

Please remember to click one of the "save" icons on the top right of the page or bottom left of the page to activate and refresh the auto-calculated fields.

Description	Last Year Actual	Current Year Budget	2013-2014 Proposed Budget	% Change of Current vs. Proposed
<i>Roanoke County</i>	700.00	800.00	800.00	
<i>City of Salem</i>	0.00	0.00	0.00	
<i>Craig County</i>	0.00	0.00	0.00	
<i>Botetourt County</i>	0.00	0.00	0.00	
United Way of Roanoke Valley program funding	10,000.00	25,000.00	27,500.00	10.00
Other UW, Designations	7,510.00	7,000.00	5,500.00	-21.43
*Other Funding Sources:	3,395.00	2,000.00	2,097.00	4.85
<i>Private Foundations</i>				
<i>Fundraising, general public support</i>				
<i>Other unspecified grants</i>				
<i>Membership Dues</i>				
<i>Private Foundations</i>	0.00	0.00	0.00	
<i>Fundraising, general public support</i>	3,395.00	2,000.00	2,097.00	
<i>Other unspecified grants</i>	0.00	0.00	0.00	
<i>Membership Dues</i>	0.00	0.00	0.00	
*Other Revenue:	143,994.00	125,683.00	125,683.00	0.00
<i>In-kind contributions</i>				
<i>Investment &amp; interest income</i>				
<i>Other unspecified revenue</i>				
<i>Sales to Public/Contract Service</i>				
<i>In-kind contributions</i>	143,311.00	125,000.00	125,000.00	
<i>Investment &amp; interest income</i>	683.00	683.00	683.00	
<i>Other unspecified revenue</i>	0.00	0.00	0.00	
<i>Sales to Public/Contract Service</i>	0.00	0.00	0.00	
<b>Total</b>	<b>412,900.00</b>	<b>391,779.00</b>	<b>398,790.00</b>	<b>1.79</b>

**Section 5: Program Budget****Expense**

Please list the expenses related to operating this program. For expenses which may be shared by other programs within the organization (e.g. telephone, building/equipment maintenance, occupancy, etc.), put this program's portion of that expenditure.

Remember to click one of the "save" icons on the top right of the page or bottom left of the page to activate and refresh the auto-calculated fields in the % Increase/Decrease column, Surplus/Deficit and UW Funding as % of Revenue .

Description	Last Year Actual	Current Year Budget	2013-2014 Proposed Budget	% Change of Current vs. Proposed
Salaries and Wages	183,521.00	170,729.00	176,705.00	3.50
Benefits/Taxes	50,434.00	48,601.00	50,302.00	3.50
Professional Fees	3,859.00	3,559.00	3,559.00	0.00
Administration	11,402.00	11,402.00	11,402.00	0.00
Supplies/Printing/Duplicating	2,294.00	2,294.00	2,294.00	0.00
Conference/Training	2,064.00	2,064.00	2,064.00	0.00
Travel	672.00	650.00	655.00	0.77
Rent and Utilities	17,450.00	17,580.00	17,580.00	0.00
Major Property & Equipment Acquisition	0.00	3,000.00	1,300.00	-56.67
Building/Equipment Maintenance	1,505.00	1,500.00	1,500.00	0.00
Organizational Dues	2,328.00	2,329.00	2,329.00	0.00
Fundraising Costs	0.00	0.00	0.00	0.00
Interest Expense	0.00	0.00	0.00	0.00
Direct Assistance to Clients	0.00	0.00	0.00	0.00
Other Expenses	147,541.02	129,100.00	129,100.00	0.00
Total	423,070.02	392,808.00	398,790.00	1.52

Description	Last Year Actual	Current Year Budget	2013-2014 Proposed Budget	% Change of Current vs. Proposed
Surplus or (Deficit)	-10,170.02	-1,029.00	0.00	-100.00

**UWRV/Human Service Funding as % of Total Revenue**

Description	Last Year Actual	Current Year Budget	2013-2014 Proposed Budget	% Change of Current vs. Proposed
UWRV Funding as % of Total Revenue	2.42	6.38	6.90	8.07
City of Roanoke Human Service Funding as % of Total Revenue	2.86	3.32	4.74	42.93

## Section 6: Program Financial Information

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Please remember to click one of the "save" icons on the top right of the page or bottom left of the page to activate the auto-calculated fields.

### Budget Narrative

*Program Fees:* This amount represents payments under our collaborative contract with LOA, under which we provide legal services to LOA clients screened and referred to us by LOA, elderly clients who are deemed to be in the greatest socioeconomic need by LOA without necessarily meeting our very low income guidelines.

*Federal Funding:* This funding is from the Legal Services Corporation (LSC), which allocates federal funding for civil legal aid across the country. Congress cut LSC funding over the last two years by almost 20%.

*City of Roanoke Human Services Funding:* We base our requests for locality funding on a simple formula of \$1 per poor person living in that locality according to the latest US Census data. Accordingly, we have previously requested annual funding totalling \$14,793 from the City of Roanoke. However, according to 2010 Census data, there are now 21,414 persons living below the poverty line in the City of Roanoke. We have adjusted our funding request to reflect the new Census data, as we have for all of our other locality funding requests. Realistically, we do not expect to receive the full amount requested, so we are budgeting \$18,914.

*Interest income:* We have a fund balance/reserves equal to less than 8 weeks' operating expenses. This generates a small amount of interest each year at the historically low interest rates we are now experiencing.

*Other United Ways and Designations:* Includes designations through the UTVRV as well as an allocation from the Franklin County United Way.

*In-kind contributions:* This amount represents the donated legal services provided our clients by pro bono attorneys through our Pro Bono Hotline and our Pro Bono Referral Program. We conservatively value their donated services at \$150/hour. Last year 99 local attorneys donated 955 billable hours.

We are projecting a small deficit in the current year budget to be covered by our reserves.

### Is the program scalable?

Yes

### Please explain program scalability:

At a per case cost of about \$160, the requested funding of \$27,500 would fund 172 cases during the grant year. From this perspective, the proposal is easily scalable. While just one fewer case is just a small percentage from a statistical perspective, from the perspective of the client assisted, the impact can be life-changing. Each dollar provided is being dramatically leveraged through the collaborations we have established and the volunteer attorney networks we have recruited and nurtured.

### Will funds requested through this application be used to directly leverage/secure other sources of revenue?

No

## Section 7: Other Sources of Revenue

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*If UWRV funds will be used to secure and leverage other funds for the program, please provide additional information by clicking the "add new funding source" button at the bottom of the page. You will be asked for the name of the funding source, amount and status of this funding (e.g. grant submitted and awaiting decision, grant pending submission in July 2012, grant awarded for 2 years effective August 2011, etc.).*

Funding Source	Amount	Status
<b>Total Amount</b>		