

TEXAS | ACCESS to JUSTICE  
FOUNDATION  
MEMORANDUM

From: Jonathan W. Vickery, Associate Director & Director of Grants

To: Interested Persons

Re: Funding Opportunity for Civil Legal Aid to Low-Income Veteran's GY 2015-2016 Grant Applications- **DUE MARCH 31, 2015**

Date: February 3, 2015

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The Texas Access to Justice Foundation (TAJF) is pleased to announce this request for proposals to provide free civil legal aid to low-income Texas veterans. The next funding opportunity is for the 2015-2016 grant year from September 1, 2015 through August 31, 2016. **The application must be submitted online no later than Tuesday, March 31, 2015.**

Over the past five years, the annual Texas Access to Justice Commission's Champions of Justice Gala has raised a total of \$1.75 million in support of legal services for low-income Texas veterans, or an average of \$350,000 annually. The Foundation applauds this effort and will, and we hope that you will be a strong supporter in the Commission's efforts to make the 2015 Gala a successful year for raising funds for Veterans Legal Services. We will not know the level of funding available for GY 2015-2016 Veterans grants until after the event which will be in May. As we caution every year, there are no assurances or guarantees that this pool of money will be available for GY 15-16 or in future years at any level. It is vital that applicants and grantees continue to seek alternative resources to sustain this important work.

Grant applicants must be currently a Texas 501 (c) (3) non-profit organization in good standing and who fits within the grant funding criteria (see Attachment II). Grant applications will only be accepted through the [online grants system](#).



#### Client Eligibility Requirements

Only clients financially income eligible (200% of federal poverty guidelines) under this funding source may be supported with TAJF funds. (See Attachment II and <http://www.tajf.org/grants/faq.aspx>). These funds cannot support criminal law legal work regardless of income eligibility. Selected applicants' screening and intake procedures must include instructions to solicit sufficient questions from the applicant to determine the total amount of household income for eligibility and must be able to demonstrate that intake of new applicants will follow these procedures uniformly and consistently.

Funds may also not be used to directly fund class action lawsuits; to directly fund lawsuits against governmental entities, except by individuals to gain benefits authorized by statute or regulation; to support lobbying for a candidate or issue; and may not be used in matters that might reasonably be expected to result in a fee from public funds or from an opposing party unless appropriate attempts have been made to obtain representation from an attorney in private practice.

#### Screening and Reporting Requirements

TAJF requires, as a condition to the granting of funds to any eligible organization, that adequate accounting and financial management be in place to account for all grant funds as well as to be able to report the actual use of the funds granted. Annual audits or audited financial statements are required from the organization. Each such selected organization receiving funds from TAJF shall keep its financial

records in accordance with generally accepted accounting principles for organizations of its type and shall furnish reports to TAJF in such form and containing such information as shall be reasonably requested. Minimally, TAJF will require quarterly financial expenditure reports, bi-annual programmatic reports, and annual programmatic and financial reports.

Selected grantee shall utilize a case management systems and procedures that ensure that information necessary for the effective management of cases is accurately and timely recorded in a case information system. Such systems and procedures shall ensure that program management has timely access to accurate information, ensure that cases involving the same client and same legal problem are not recorded and reported to TAJF more than once as well as the capacity to meet funding sources' reporting requirements.

### **Geographic Service Area**

TAJF funded legal services to Veterans grants are limited to only eligible veterans and to one of the three service areas of TAJF (see Attachment I for listing of counties by region) unless your proposal is offering statewide services. For example, if you are awarded a Veterans grant for the East and Gulf Coast area, TAJF funds are limited to services to residents within that region, which should also be consistent in your grant application. Applicants may not support funded legal services in counties outside their awarded service area unless TAJF approves statewide services. TAJF Board makes grant decisions based on the allocation rule to ensure funds awarded are proportionate to regions' targeted poverty populations.

### **Online Grants System**

You can access the online grants system by going to <http://grants.tajf.org>. You must register before you can submit an online application. If new to the system click on "register" and enter applicable information. Once approved, you will be able to access funding opportunities. To access the new funding opportunities, select *Funding Opportunities* from the *Main Menu*. This system offers convenient features such as:

- Previewing & printing application before starting & at any point before submission
- Copying old applications and editing and updating for new application(s)
- Saving work and returning to it later
- Easy editing of forms
- NOTE that in the fields for narrative responses that there is a character limit of 3,500 maximum so please be concise and brief- answer only the question asked- no exceptions.
- Copying and pasting text from word-processed documents into Web forms
- Required fields to help make sure that all necessary data was included
- Error notices that is a required field is not filled out, or if incorrect information is entered (such as text in a numeric field), you will receive clear and simple feedback about what the error is and how to fix it
- Easily file attachments
- Convenient & informative drop-down lists and check boxes

Please reference the formal grant application protocol listed in this section of the website.

If you have any questions, please feel free to contact me at [jvickery@teajf.org](mailto:jvickery@teajf.org), or if you have any questions concerning the online grants system, you can contact Jessica Murray at [jmurray@teajf.org](mailto:jmurray@teajf.org).

## **Attachment I**

### **TAJF Service Areas by Counties in Region**

#### **Southwest Texas**

Aransas, Atascosa, Bandera, Bastrop, Bee, Bexar, Blanco, Brewster, Brooks, Burnet, Caldwell, Calhoun, Cameron, Comal, Crockett, Culberson, Dewitt, Dimmit, Duval, Edwards, El Paso, Frio, Gillespie, Goliad, Gonzales, Guadalupe, Hays, Hidalgo, Hudspeth, Jackson, Jeff Davis, Jim Hogg, Jim Wells, Karnes, Kendall, Kenedy, Kerr, Kimble, Kinney, Kleberg, Lasalle, Lavaca, Live Oak, Llano, Mason, Maverick, McMullen, Medina, Nueces, Pecos, Presidio, Real, Reeves, Refugio, San Patricio, Starr, Sutton, Terrell, Travis, Uvalde, Val Verde, Victoria, Webb, Willacy, Williamson, Wilson, Zapata, Zavala

#### **Northwest Texas**

Andrews, Archer, Armstrong, Bailey, Baylor, Borden, Briscoe, Brown, Callahan, Carson, Castro, Childress, Clay, Cochran, Coke, Coleman, Collin, Collingsworth, Comanche, Concho, Cooke, Cottle, Crane, Crosby, Dallam, Dallas, Dawson, Deaf Smith, Denton, Dickens, Donley, Eastland, Ector, Ellis, Erath, Fannin, Fisher, Floyd, Foard, Gaines, Garza, Glasscock, Gray, Grayson, Hale, Hall, Hansford, Hardeman, Hartley, Haskell, Hemphill, Hockley, Hood, Howard, Hunt, Hutchinson, Irion, Jack, Johnson, Jones, Kaufman, Kent, King, Knox, Lamb, Lipscomb, Loving, Lubbock, Lynn, Martin, McCulloch, Menard, Midland, Mills, Mitchell, Montague, Moore, Motley, Nolan, Ochiltrie, Oldham, Palo Pinto, Parker, Parmer, Potter, Randall, Reagan, Roberts, Rockwall, Runnels, San Saba, Schleicher, Scurry, Shackelford, Sherman, Somervell, Stephens, Sterling, Stonewall, Swisher, Tarrant, Taylor, Terry, Throckmorton, Tom Green, Upton, Ward, Wheeler, Wichita, Wilbarger, Winkler, Wise, Yoakum, Young

#### **East/Gulf Coast Texas**

Anderson, Angelina, Austin, Bell, Bosque, Bowie, Brazoria, Brazos, Burleson, Camp, Cass, Chambers, Cherokee, Colorado, Coryell, Delta, Falls, Fayette, Fort Bend, Franklin, Freestone, Galveston, Gregg, Grimes, Hamilton, Hardin, Harris, Harrison, Henderson, Hill, Hopkins, Houston, Jasper, Jefferson, Lamar, Lampasas, Lee, Leon, Liberty, Limestone, Madison, Marion, Matagorda, McLennan, Milam, Montgomery, Morris, Nacogdoches, Navarro, Newton, Orange, Panola, Polk, Rains, Red River, Robertson, Rusk, Sabine, San Augustine, San Jacinto, Shelby, Smith, Titus, Trinity, Tyler, Upshur, Van Zandt, Walker, Waller, Washington, Wharton, Wood

## Attachment II

### Announcement of Anticipated Available Funds for Civil Legal Aid for Low-Income Veterans- Applications Due March 31, 2015

The Texas Access to Justice Foundation (TAJF) is pleased to announce that TAJF is soliciting proposals for GY 2015-2016 to fund free civil legal services for low-income Texas veterans.

The Texas Access to Justice Commission is again hosting a "Champions of Justice Gala for Veterans". Proceeds from the event have been designated to fund free civil legal services for low-income Texas veterans.

Although we do not know the level of funding that will come from this event, the Foundation Board would like to solicit proposals, because of the tremendous interest and importance this cause represents and the Foundation wants to be prepared if or once funds become available. There are no guarantees or assurances as to funds raised. Information about TAJF and funding requirements can be found at <http://www.tajf.org/grants/faq.aspx>.

Please note that Veterans funds are given as ONE TIME FUNDING, and applicants must be Texas 501 (c) (3) non-profit corporations.

#### Criteria for Proposals

These funds are to address the increased demand for legal services at a time when many veterans are returning from the war in Afghanistan. Selected grant applicants will help increase support and deliver free civil legal services to help low-income Texas veterans with many critical civil legal services in matters such as family law, employment, housing, consumer, bankruptcy and probate, as well as including filing claims for compensation or pensions from the Department of Veterans Affairs (VA). Legal assistance is also needed for representing veterans in filing claims for indigent veterans suffering from service-connected disabilities. The scope of work can also help family members of living or deceased veterans apply for VA benefits.

We encourage interested applicants to review the work provided by current TAJF funded grantees as well as the Veterans Consortium Pro Bono Program of National Veterans Legal Services Program ([www.nvlsp.org](http://www.nvlsp.org)). TAJF has previously funded programs to provide civil legal aid to low-income veterans using pro bono and staff attorneys such as: *Texas Legal Services Center, the Tarrant County Bar Foundation, Lone Star Legal Services, Fort Bend Lawyers Care, El Paso Bar Foundation, Jefferson County Bar Foundation, Legal Aid of NorthWest Texas, Houston Bar Foundation, Community Justice Project of the San Antonio Bar Association, Cathedral Justice Project-Cathedral Health and Outreach Ministries, and Oficina Legal del Pueblo Unido*. **It is required** that applicants contact programs within their service area to make sure that proposed projects are not duplicative, and that there is a minimum of overlapping unless strategically planned.

Applicants should demonstrate an ability to work with local bar associations, pro bono and legal aid programs, and capitalize on the existing infrastructure to deliver pro bono services to Texas veterans. Funds must be used to provide free civil legal assistance to low-income individuals, and grant applicants must have the capacity to screen and conduct eligibility determinations as well as maintain adequate documentation that funds are being used for their intended purpose. Selected applicants must report

quarterly on actual expenditures, report activities and services provided, as well as the level and type of legal service provided.

Any proposal submitted should be designed so support for the project will continue after the grant period. Submitted proposals might include one or more of the following features:

- Designing and holding pro bono training for private and legal aid attorneys in representing veterans in one or each of the three TAJF regions (see below)
- Recruiting and supporting pro bono attorneys in providing legal services to veterans
- Establishing or supporting regular and ongoing clinical modules utilizing volunteers and legal aid staff targeting eligible low income veterans in heavily populated areas
- Establishing or supporting a telephone hotline for veterans to contact when they cannot obtain free legal aid but still will access to legal information to help resolve their problem. The hotline piece may be staff or volunteer run or a combination of both
- Supporting the State Bar of Texas, local bar associations with recruiting and training volunteer lawyers and help sponsor and coordinate pro bono civil legal clinics for veterans
- Providing veterans with the resources they need to seek and receive civil legal assistance
- Providing local bar associations with the materials and other resources to successfully conduct legal clinics
- Recruiting and training a measurable number of lawyers and tracking the number of lawyers attending specially created clinics for veterans, and offering legal assistance to veterans
- Creating an online legal resource center for the veteran community by contributing content and materials to [www.texaslawhelp.org](http://www.texaslawhelp.org) and [www.texaslawyershelp.org](http://www.texaslawyershelp.org) .

### **Geographic Service Area**

Your proposal should be limited to one service area and the counties within the service area (see attachment) unless you are offering a statewide program. There are approximately 290 local, county, and specialty bar associations in Texas. TAJF wants to ensure that the needs of hard-to-reach veterans in smaller communities and rural areas receive the same attention by working with the network of local bar associations across the state to help them create their own legal clinics.

### **Collaborative Stakeholders**

Any selected applicant(s) would be expected to work with, coordinate and collaborate with existing legal aid and bar association pro bono programs working to expand civil legal services to low-income Texas veterans, avoid duplication, and maximize limited resources.

***The Texas Lawyers for Texas Veterans (TLTV)*** project focuses on expanding and increasing the delivery of pro bono civil legal services to veterans or their family members who cannot afford or do not have

access to basic legal services. The TLTV project expands to a statewide level as veterans' initiative began in 2008. The TLTV project works with state legal aid organizations and veterans' organizations, including the VA Medical Centers, the Veterans of Foreign Wars, and the American Legion. The goal is to identify and assist hard-to-reach veterans seeking legal assistance for benefit claims and civil matters, such as family law issues, consumer law issues, bankruptcy or tax issues, landlord/tenant disputes, and probate or estate planning.

**Operation Enduring LAMP** (Legal Assistance for Military Personnel) is a program of the State Bar of Texas (SBOT) and the Military Law Section whereby local bar members provide pro bono legal assistance to include some court actions, to qualifying active duty military, members of the Reserves and National Guard called to active duty, and their families, occasioned by action in Afghanistan and Iraq.

Grant proposals parameters:

- Grant Proposal should be submitted no later than March 31, 2015. All grant applications must be submitted online. Paper applications mailed or electronically submitted as an attachment will not be accepted.
- Income eligibility for funded services and support will be 200% of the federal poverty guidelines See TAJF 2015 Financial Eligibility Guidelines <http://tajf.org/grants/applications.aspx> ). Applicants must have adopted asset guidelines for eligibility determination and all clients funded with TAJF funds must be screened for eligibility and qualification. TAJF funds cannot be used to support or assist ineligible clients.
- Selected applicants for funding must be able to provide reports and data required by the Foundation including actual expenditures and programmatic information on all legal services provided.

### Criteria for Grants

To be eligible, an applicant must submit a grant application that includes:

- Proof of current non-profit status
- Proof of current professional liability insurance
- Updated list of Board of Directors
- A narrative portion detailing the proposed scope of work
- Description of the need(s) to be addressed
- Plans to address services to meet the need
- identify any collaborative partners
- How outcomes will be measured and tracked
- How data will be collected, stored and retrievable:
- Projected budget with explanation
- identify any anticipated fund from other sources

- anticipated in-kind support

### **Specific Grant Criteria**

The Foundation, recognizing the size and vast geographic diversity of the state and the unique needs of its various areas, will consider the following criteria in making grants:

- Track record of the applicant organization in the delivery of free civil legal aid or support for pro bono work
- The number of poor persons to be served by the applicant/grantee organization
- Availability of other funding for the proposed projects
- The number of other organizations in the service area providing similar services
- Requests for one-time needs, e.g. capital additions, outreach campaigns
- Comparison to other similar project's funding
- Unmet legal needs of veterans in targeted region
- Collaborative efforts
- Potential for leveraging other resources
- Development and expansion of pro bono

## **Required information To be collected From Each Applicant for Legal Aid**

- Number of persons living in household
- Description and amount of all household income
- Gender, age, sex and race/ethnicity of applicant
- Address city, county zip code-telephone number
  
- Client profile-
  - Homeless
  - Veteran
  - Disabled or physically impaired
  - Victim of crime
  - Victim of domestic violence
  - Person that is terminally ill
  - Undocumented immigrant (including refugee)
  - Migrant worker
  - Elderly
  - Prisoner/inmate (incarcerated in jail or prison)



# Key Definitions To Be Used for Tracking, Recording and Reporting on TAJF Funded Legal Aid to Veterans

**Case:** *A "case" is a distinct legal problem or a set of closely related legal problems of a client, and legal activities or processes used in resolving those problems. The case must have been accepted by the program and includes advice, counsel and limited action, as well as other types of legal representation. A client with two or more closely related problems will be considered as presenting a single case if all of the problems will be resolved through a single legal process or forum. The provision of legal information solely, does not constitute a case.*

**Legal Information:** *Legal information is defined as the provision of substantive information not tailored to address a person's specific legal problem. As such, it is general and does not involve applying legal judgment and does not recommend a specific course of action. For example, providing only a pamphlet or brochure is legal information and not legal assistance. The provision of legal information does not create an attorney-client relationship. Legal information alone is not legal assistance and the provision of legal information may not be reported as a Case Service Report number. However, this should be tracked and documented so as available for other non-case reports.*

**NOT REPORTABLE AS CASE**

## "Major Reason Case Closed" Definitions

**Counsel and Advice:** *A case closed as a result of the provision and receipt of legal advice to an eligible client, e.g., the review of relevant facts, exercised judgment in interpreting the particular facts presented and in applying the relevant law to the facts, and the counseling of the client on actions to take to address the problem(s).*

**Limited Action:** *A case closed through limited action(s) on behalf of an eligible client that addressed the client's legal problem that is not as complex or extended as to meet the requirements for "extensive service". Examples include, communications by letter, telephone or other means to a third party; preparation of a simple legal document such as a routine will or power of attorney; or legal assistance to a pro se client that involves preparation of court or other legal documents.*

**Negotiated Settlement without litigation:** *A case closed through negotiation where an actual settlement was reached on behalf of a client without any court or administrative actions pending. This category should be reserved for cases in which the advocate conferred with another party so as to reach a resolution of the client's legal problem.*

**Negotiated Settlement with litigation:**

*A case closed through neg. where settlement was reached while a court or administrative action was pending. This is reserved for cases in which the advocate conferred with another party to resolve client's problem and where an appearance has been entered as counsel; not assisting a pro se client.*

**Administrative Agency Decision:**

*A case closed because of representation of a client in an administrative agency action that resulted in a case-dispositive decision by the administrative agency or body, after a hearing or other formal administrative process. This category does not include settlements made during the course of litigation that are then approved by the administrative agency, voluntary dismissals or the grant of a motion to withdraw as counsel.*

**Court Decision:**

*A case closed in which the advocate represented a client in a court proceeding that resulted in a case dispositive decision made by the court should be closed as a Court Decision. This category is divided into the following three subcategories:*

**(a) Uncontested Court Decisions**

*either there is no adverse party or the adverse party does not contest the case;*

**(b) Contested Court Decisions**

*there is an adverse party and that party contests the case;*

**(c) Appeals**

*Appeals to an appellate court taken from a decision of any final court or tribunal*

**Other:**

*A closed case that does not fit any of the preceding case closure categories. Cases which fit two or more CSR categories may not be closed in this category, but should be closed in the category which best reflect the level of service provided.*

**Extensive Service (not resulting in Settlement or Court or Administrative Action)**

*A case closed in which the program undertook extensive research, preparation of complex legal documents, extensive interaction with third parties on behalf of an eligible client, or extensive on-going assistance to clients who are proceeding pro se should be closed as Extensive Service. Some examples are preparation of complex advance directives, wills, contracts, real estate documents or other legal documents, or the provision of extensive transactional work. This category also includes cases closed after extensive interaction or negotiations with another party which do not result in a negotiated settlement. In addition, cases closed after litigation is initiated in which the program appears as counsel of record that do not result in a negotiated settlement, administrative agency or court decision, or in which an order of withdrawal or voluntary dismissal is entered should be closed in this category.*

### **Direct/Program Costs and Indirect/Administrative Costs**

**Direct costs (also known as “program costs”)** are those costs that can be identified specifically with a particular cost objective. These may be charged directly to cost objectives without further decision making. Examples include: salaries, wages and related fringe benefits; materials consumed or expended specifically for the purpose of the grant; equipment and other approved capital expenditures necessary to accomplish the purpose of the grant; travel expenses incurred specifically to carry out the award and services furnished specifically for the cost objective.

**Indirect costs (typically “administrative costs”)** are costs incurred for common or joint purposes benefiting more than one cost objective. They cannot be readily directly assignable to the cost objective specifically benefited. In other words, those costs remaining after all direct costs have been identified. Examples of indirect costs are: costs of operating and maintaining facilities such as space/occupancy, utilities, telephone, office supplies, incurred; general and administrative expenses, such as salaries and expenses of executive officers, accounting staff, for the benefit of the project as a whole, as well as other activities of the grantee.

## **Legal Problem Codes That Must be Recorded for Each Client's Case**

Clients' legal problems are to be categorized and tracked using ONLY ONE of the below:

### **CONSUMER/FINANCE**

- 01 – Bankruptcy/Debtor Relief
- 02 – Collection (Including Repossession/Deficiency/Garnishment)
- 03 – Contracts/Warranties
- 04 – Collection Practices/Creditor Harassment
- 05 – Predatory Lending Practices (Not Mortgages)
- 06 – Loans/Installment Purchase (Not Collections)
- 07 – Public Utilities
- 08 – Unfair and Deceptive Sales and Practices (Not Real Property)
- 09 – Other Consumer/Finance

### **EDUCATION**

- 11 – Reserved
- 12 – Discipline (Including Expulsion and Suspension)
- 13 – Special Education/Learning Disabilities
- 14 – Access (Including Bilingual, Residency, Testing)
- 15 – Vocational Education
- 16 – Student Financial Aid
- 19 – Other Education

### **EMPLOYMENT**

- 21 – Employment Discrimination
- 22 – Wage Claims and other FLSA (Fair Labor Standards Act) Issues
- 23 – EITC (Earned Income Tax Credit)
- 24 – Taxes (Not EITC)
- 25 – Employee Rights
- 26 – Agricultural Worker Issues (Not Wage Claims/FLSA Issues)
- 29 – Other Employment

### **FAMILY**

- 30 – Adoption
- 31 – Custody/Visitation
- 32 – Divorce/Separation/Annulment
- 33 – Adult Guardian/Conservatorship
- 34 – Name Change
- 35 – Parental Rights Termination
- 36 – Paternity
- 37 – Domestic Abuse
- 38 – Support
- 39 – Other Family

**JUVENILE**

- 41 – Delinquent
- 42 – Neglected/Abused/Dependent
- 43 – Emancipation
- 44 – Minor Guardian/Conservatorship
- 49 – Other Juvenile

**HEALTH**

- 51 – Medicaid
- 52 – Medicare
- 53 – Government Children’s Health Insurance Programs
- 54 – Home and Community Based Care
- 55 – Private Health Insurance
- 56 – Long Term Health Care Facilities
- 57 – State and Local Health
- 59 – Other Health

**HOUSING**

- 61 – Federally Subsidized Housing
- 62 – Homeownership/Real Property (Not Foreclosure)
- 63 – Private Landlord/Tenant
- 64 – Public Housing
- 65 – Mobile Homes
- 66 – Housing Discrimination
- 67 – Mortgage Foreclosures (Not Predatory Lending/Practices)
- 68 – Mortgage Predatory Lending/Practices
- 69 – Other Housing

**INCOME MAINTENANCE**

- 71 – TANF
- 72 – Social Security (Not SSDI)
- 73 – Food Stamps
- 74 – SSDI
- 75 – SSI
- 76 – Unemployment Compensation
- 77 – Veterans Benefits
- 78 – State and Local Income Maintenance
- 79 – Other Income Maintenance

**INDIVIDUAL RIGHTS**

- 81 – Immigration/Naturalization
- 82 – Mental Health
- 84 – Disability Rights
- 85 – Civil Rights
- 86 – Human Trafficking
- 89 – Other Individual Rights

**MISCELLANEOUS**

91 – Legal Assistance to Non-Profit Organization or Group (Including Incorporation/Dissolution)

92 – Indian/Tribal Law

93 – Licenses (Drivers, Occupational, and Others)

94 – Torts

95 – Wills/Estates

96 – Advance Directives/Powers of Attorney

97 – Municipal Legal Needs

99 – Other Miscellaneous

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# Legal Outcomes To Be Tracked & Reported To TAJF

## 1. Consumer/Finance

- 101 Obtained federal bankruptcy protection
- 201 Stopped or reduced debt collection activity
- 202 Averted repossession
- 203 Avoided or reduced deficiency judgments
- 204 Avoided, ended or reduced garnishment or levy
- 205 Stopped or avoided predatory lending practices
- 301 Overcame unfair or illegal sales contracts or fraudulent sales practices
- 302 Enforced sales contracts and/or warranties
- 303 Obtained life insurance benefits for spouse or beneficiary of deceased person
- 401 Obtained or preserved credit or resolved credit reporting errors
- 701 Avoided or delayed utility termination, or secured utility services
- 702 Obtained waiver or reduction of utility arrearage (including phone)
- 991 Obtained advice & counsel on a Consumer/Finance matter
- 992 Obtained non-litigation advocacy services on a Consumer/Finance matter
- 993 Obtained adverse decision in a Consumer/Finance matter
- 999 Obtained other benefit on a Consumer/Finance matter, none of the above

## 2. Education

- 1100 Avoided fraudulent student financial aid practices
- 1101 Avoided corporal punishment or delayed suspension or expulsion
- 1106 Avoided barriers to educational services
- 1103 Avoided inappropriate special education classification
- 1104 Obtained individualized educational program and/or appropriate services consistent with the special education law
- 1105 Obtained correction of school records
- 1191 Obtained advice & counsel on an Education matter
- 1192 Obtained non-litigation advocacy services on an Education matter
- 1193 Obtained adverse decision in an Education matter
- 1199 Obtained other benefit on an Education matter, none of the above

## 3. Employment

- 2101 Overcame, or obtained redress for, job discrimination based on race, gender, disability, age, sexual orientation, national origin, immigration status, or other factors not related to job
- 2201 Obtained wages, back (or equal) pay or overtime due
- 2301 Obtained assistance in applying for EITC
- 2401 Obtained taxpayer advocacy assistance with Federal income taxes
- 2501 Enforced employee rights under state or federal law
- 2601 Addressed issues adversely impacting agricultural workers
- 2901 Avoided, or obtained redress for, wrongful discharge
- 2902 Delayed discharge
- 2904 Obtained job training
- 2905 Resolved on-the-job issues such as safety or grievance procedures

- 2906 Resolved minimum wage dispute
- 2907 Enforced employment contract
- 2908 Overcame, or obtained redress for, violation of protective statutes
- 2909 Asserted collective rights in employment
- 2991 Obtained advice & counsel on an Employment matter
- 2992 Obtained non-litigation advocacy services on an Employment matter
- 2993 Obtained adverse decision in an Employment matter
- 2999 Obtained other benefit on an Employment matter, none of the above

#### **4. Family**

- 3001 Obtained adoption
- 3101 Obtained or maintained custody of children
- 3102 Obtained or preserved right to visitation/possession
- 3103 Avoided removal of children
- 3201 Obtained a divorce
- 3202 Obtained a divorce, including custody and support
- 3203 Obtained ex parte/temporary orders prior to client/attorney withdrawing
- 3204 Obtained annulment
- 3301 Obtained guardianship (adult)
- 3302 Prevented guardianship (adult)
- 3304 Prevented guardianship
- 3401 Obtained name change
- 3502 Avoided termination of parental rights
- 3503 Obtained family reunification
- 3601 Established paternity for child
- 3602 Established paternity and obtained support
- 3701 Obtained a divorce in a case involving domestic violence
- 3702 Obtained a divorce with Protective Order in a case involving domestic violence
- 3703 Obtained a divorce with Protective Order, including custody, support (child and/or spousal) and appropriate terms of possession in a case involving domestic violence
- 3704 Obtained divorce, including custody, support and appropriate terms of possession in a case involving domestic violence
- 3705 Obtained temporary orders prior to client/attorney withdrawing in a case involving domestic violence
- 3720 Obtained Protective Order from domestic violence
- 3721 Obtained Protective Order, Custody and Support (child and/or spousal) in a case involving domestic violence
- 3722 Obtained protection from elder abuse or neglect
- 3723 Obtained assistance with safety planning
- 3791 Obtained advice & counsel on a domestic violence matter
- 3792 Obtained non-litigation advocacy services on a domestic violence matter
- 3801 Obtained, preserved or increased child support
- 3802 Obtained modification of child support
- 3803 Obtained, preserved or increased spousal support



- 3901 Obtained foster care services
- 3902 Improved terms of foster care plan
- 3991 Obtained advice & counsel on a Family matter not involving domestic violence
- 3992 Obtained non-litigation advocacy services on a Family matter not involving domestic violence
- 3993 Obtained adverse decision in a Family matter
- 3999 Obtained other benefit on a Family matter, none of the above

#### **5. Juvenile**

- 4301 Obtained emancipation of minor
- 4401 Obtained protection of rights by representing minor in guardianship or conservatorship
- 4991 Obtained advice and counsel on a Juvenile matter
- 4992 Obtained non-litigation advocacy services on a Juvenile matter
- 4993 Obtained adverse decision on a Juvenile matter
- 4999 Obtained other benefit on a Juvenile matter, none of the above

#### **6. Health**

- 5101 Obtained, preserved or increased Medicaid or Medicare benefits/rights
- 5102 Obtained assistance with Medicaid planning
- 5301 Obtained, preserved or increased Children's Health Insurance Program benefits
- 5901 Obtained, preserved or increased individual access to health care
- 5902 Prevented abuse or premature discharge, or assured quality care, in nursing home or mental treatment facility
- 5903 Obtained discharge from nursing home or mental treatment facility
- 5401 Obtained preserved or increased home and/or community based care benefits
- 5501 Obtained, preserved or increased private health insurance benefits
- 5601 Obtained, preserved or increased access to long term health care facilities
- 5701 Obtained, preserved or increased Crime Victim's Compensation benefit
- 5904 Stopped, or obtained redress for, harmful medical treatment
- 5905 Obtained, or enforced terms of, health or disability insurance
- 5991 Obtained advice & counsel in a Health matter
- 5992 Obtained non-litigation advocacy services in a Health matter
- 5993 Obtained adverse decision in a Health matter
- 5999 Obtained other benefit on a Health matter, none of the above

#### **7. Housing**

- 6101 Obtained access to Section 8 housing
- 6102 Obtained access to housing under applicable law
- 6201 Obtained assistance in homeownership
- 6202 Obtained clear title to property
- 6203 Had fraudulent mortgage rescinded
- 6301 Prevented eviction from private housing
- 6302 Delayed eviction providing time to seek alternative housing
- 6304 Avoided, or obtained redress for, charges by landlord

- 6305 Overcame denial of tenant's rights under lease
- 6306 Obtained repairs or otherwise enforced rights to decent, habitable housing
- 6307 Preserved or restored access to personal property
- 6401 Prevented denial of public housing tenant's rights
- 6402 Prevented eviction from public housing
- 6501 Prevented loss of /or eviction of mobile home
- 6601 Overcame, or obtained redress for, discrimination in obtaining or keeping housing
- 6701 Avoided or delayed foreclosure or other loss of home
- 6801 Rescinded, modified and/or avoided mortgage because of predatory lending practices
- 6901 Overcame, or obtained redress for, discrimination in obtaining housing
- 6902 Obtained assistance in development/renovation of affordable housing
- 6991 Obtained advice & counsel in a Housing matter
- 6992 Obtained non-litigation advocacy services in a Housing matter
- 6993 Obtained adverse decision in a Housing matter
- 6999 Obtained other benefit on a Housing matter, none of the above

#### **8. Income Maintenance**

- 7101 Obtained, preserved or increased general public assistance or TANF benefits/rights
- 7102 Overcame denial of emergency assistance by DHS
- 7103 Overcame illegal or unfair application of welfare work requirement
- 7104 Avoided wrongful placement or term of training
- 7201 Obtained, preserved or increased Black Lung benefits/rights
- 7301 Obtained, preserved or increased food stamps eligibility/right
- 7401 Obtained, preserved or increased SSA benefit/right
- 7402 Obtained, preserved or increased SSD benefit/right
- 7501 Obtained, preserved or increased SSI benefit/right
- 7601 Obtained, preserved or increased unemployment insurance benefits/rights
- 7701 Obtained, preserved or increased Veterans benefits/rights
- 7702 Obtained, preserved or increased other military benefits/rights
- 7801 Obtained Workmen's Compensation benefits/rights
- 7802 Obtained, preserved or increased Crime Victim's Compensation benefit
- 7902 Obtained, preserved or increased civil service retirement or disability benefits/rights
- 7903 Obtained, preserved or increased railroad retirement benefits/rights
- 7904 Obtained identification
- 7991 Obtained advice & counsel in an Income Maintenance matter
- 7992 Obtained non-litigation advocacy services in an Income Maintenance matter
- 7993 Obtained adverse decision in an Income Maintenance matter
- 7999 Obtained other benefit on an Income Maintenance matter, none of the above

#### **9. Immigration**

- 8101 Obtained relief from deportation

- 8102 Obtained citizenship
- 8103 Obtained asylum or relief under convention against torture
- 8104 Obtained release from INS custody
- 8105 Obtained adjustment of legal status
- 8106 Obtained employment authorization or obtained/replaced Green Card
- 8107 Family kept intact
- 8108 Obtained tort relief under civil rights claim
- 8109 Obtained relief or redress from constitutional violation
- 8110 Obtained administration relief from misconduct
- 8111 Undocumented minor obtained declaration as abused, neglected or abandoned
- 8191 Obtained advice & counsel in an Immigration matter
- 8192 Obtained non-litigation advocacy services in an Immigration matter
- 8193 Obtained adverse decision in an Immigration matter
- 8199 Obtained other benefit on an Immigration matter, none of the above

#### **10. Disability**

- 8401 Obtained discharge from institutional setting (i.e., state schools, state hospitals, nursing homes, ICF-MRs)
- 8402 Secured appropriate treatment plans in institutional setting
- 8403 Obtained investigation of abuse or neglect in institutional setting
- 8404 Obtained validation of abuse or neglect in institutional setting
- 8405 Secured vocational rehabilitation (i.e., employment) training services
- 8406 Secured, maintained or advanced in employment
- 8407 Secured access to or maintained housing
- 8408 Secured access to or maintained health care
- 8409 Secured or maintained financial benefits or entitlements
- 8410 Secured an appropriate public education
- 8411 Secured appropriate educational services in an inclusive and integrated setting
- 8412 Secured transition services as part of their IEP
- 8413 Obtained reversal of illegal suspension/expulsion from school
- 8414 Secured or maintained assistive technology devices/services
- 8415 Secured community residential and support services
- 8491 Obtained advice & counsel in a Disability-Related matter
- 8492 Obtained non-litigation advocacy services in a Disability-Related matter
- 8493 Obtained an adverse decision in a Disability-Related matter
- 8499 Obtained other benefit related to rights of disabled persons

#### **11. Other Individual Rights**

- 8601 Prevented and/or obtained relief from, the battery or cruelty, sexual assault or trafficking, or related crimes, for victims of trafficking or family members
- 8902 Obtained or preserved rights of community residence facility resident(s)
- 8903 Obtained or preserved rights of other institutionalized person(s)
- 8904 Obtained, preserved or increased access to public facilities/accommodations

- 8991 Obtained advice & counsel in an Individual Rights matter
- 8992 Obtained non-litigation advocacy services in an Individual Rights matter
- 8993 Obtained adverse decision in an Individual Rights matter
- 8999 Obtained other benefit on an Individual Rights matter, none of the above

## **12. Miscellaneous Outcomes**

- 9101 Obtained incorporation
- 9102 Obtained dissolution of corporation
- 9103 Obtained tax exempt status
- 9104 Obtained judicial relief
- 9301 Overcame taking of or restriction to a driver's license
- 9302 Obtained occupational license
- 9401 Avoided or reduced tort judgment
- 9501 Obtained a will
- 9502 Settled estate
- 9503 Obtained a living will and/or health proxy/health care power of attorney
- 9504 Obtained a special needs trust
- 9505 Obtained a financial power of attorney
- 9506 Obtained assistance with estate planning / living trusts
- 9507 Obtained major estate planning packet, without execution
- 9508 Obtained major estate planning packet, with execution
- 9601 Obtained assistance in filing for Crime Victim's Compensation
- 9701 Obtained assistance with Federal income taxes
- 9702 Obtained assistance in filing for Earned Income Tax Credits
- 9799 Solved other tax problem
- 9903 Obtained assistance with business start/development
- 9999 Other Outcome - none of the above - Specify: