

California Evaluation and Main Benefits Handbook

November 30

2015

Case Summary Report

Narrative Evaluation Report and Stories

Main Benefits (Outcomes)

Economic Benefits

Acknowledgements

The State Bar sincerely thanks the Legal Services Trust Fund Commission and the following programs for donating their staffs' expertise to develop and test the Main Benefits identified in this Handbook. This has been an extensive and multi-year process to develop meaningful data to talk about the important and diverse work of legal services.

The process began in September 2012, with meetings in Los Angeles and San Francisco, bringing together 74 advocates in a meeting facilitated by Tiela Chalmers, and led by Commission members Donna Hershkowitz, Ellen Pirie and Corey Friedman. Those meetings generated many ideas about ways to streamline grantmaking, including bringing grants to a single year. From those meetings, was born a very special committee, which has become known as the "IOLTA Reboot Committee."

Particular thanks to the Legal Aid Association of California, which has been represented on the committee from inception, and which has been a key vehicle for its members to communicate with the Bar throughout this process. LAAC has also taken an active role gathering information from its members, for example on Case Management Systems, and in facilitating discussions about best use of the data through regular meetings with Stanford Law student volunteers, who are guiding data review and analysis.

While some members left early, and some came late, the committee devoted a phenomenal amount of time and resources, and a strong core group stayed with this process from beginning to end, faithfully attending meetings, reviewing documents, leading discussions, cajoling volunteers, and pushing this process along or pulling it back, depending on need, and the realities of the circumstances under which data is collected.

The committees formed small groups of advocates with expertise in 13 substantive areas: Housing, Consumer/Finance, Immigration, Family, Education, DV, Health, Individual Rights, Juvenile, Conservatorship/Guardianship, Employment, Income Maintenance, Miscellaneous. Those persons, working with reboot committee members, took main benefits identified in other states, and drafted proposed benefits for collection in California. An additional category for "Access to Justice" was added.

Recommendations were taken back to the Reboot for standardization in approach and content, and the draft benefits were presented to the community in meetings in 2014 in Los Angeles and San Francisco, and then again through subject specific webinars to obtain feedback on each of the draft areas of benefits. Feedback was considered by the Reboot committee again, and draft main benefits were developed for piloting. The feedback from testers was carefully considered, and more adjustments were made.

Our gratitude to the following organizations that played key roles in the development of the information contained herein.

Corey Friedman, Legal Services Trust Fund Commission
Donna Hershkowitz, Legal Services Trust Fund Commission

Alliance for Children’s Rights
Bet Tzedek Legal Services
California Rural Legal Assistance
Child Care Law Center
Community Legal Services in East Palo Alto
Disability Rights California
Disability Rights Legal Center
Elder Law and Advocacy
Immigrant Legal Resource Center
Justice & Diversity Center of the Bar Association of San Francisco
Legal Aid Foundation of Los Angeles
Legal Aid Society of San Francisco, Employment Law Center
Legal Services for Seniors
Legal Services for Children
Legal Services of Northern California
Los Angeles Center for Law and Justice
Neighborhood Legal Services of Los Angeles County
Public Counsel
Public Law Center
San Diego Volunteer Lawyer Program
University of San Diego School of Law Legal Clinics
Watsonville Law Center
Western Center on Law & Poverty
Youth Law Center

This truly has been a community effort, and we look to continued support from the community as we collect the important information that will enable the Commission to articulate the importance of funding critical legal aid for low income people.

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Background

In 2012, we embarked on a process to: 1) Leverage available resources by rethinking and streamlining grant administration for grantees, staff and Commission; and, 2) Improve the measurement and collection of outcome data, primarily to better articulate unmet need and accomplishments to funders, but also to begin to plan around gaps and build regional and substantive collaborations.

With respect to the first goal of streamlining grant administration, all grants have been transitioned to a single calendar year grant period, and we are in the throes of bringing all grants into a single online software system, that avoids inputting duplicative information, is accessible for collaboration from any desktop, and can provide data summary reports. We appreciate the broad views of the committee as well as significant input from application testers.

This Handbook pertains to the second goal of improving our collection of outcome and other evaluative data. To date, the Commission's uniform collection of data (separate from EAF program-owned data), has been limited to Case Summary Reports (which is a service report on the types and number of matters or cases closed classified by broad area of substantive focus), and narrative. We now are matching those case service counts with information about the main benefits that advocates have achieved for their clients, including the dollar value of those benefits. We will use the information to tell the story about the value of the services provided to clients, and the overall benefit of legal services to society.

Evaluation and Reporting will include the following:

- I. Case Summary Report
- II. Narrative Evaluation Report and Stories
- III. Main Benefits
- IV. Economic Benefits

Implementation Timeline

Reporting requirements for achievements during the 2015 grant year will be similar to past years. As in the past, Grantees will be required to provide evaluative reports for the 2015 year, including Case Summary Report data, narrative reports on work accomplished, client stories, and descriptions of policy advocacy and impact cases. Evaluative report forms will be available in January for submission in March 2016.

For the 2016 grant year, programs are requested to begin collecting Main Benefit and Economic Benefit data. Programs that are able, are requested to begin collecting data January 1, but collection is not required until April 1, 2016. Six-month data collected must be reported to the State Bar on November 1, in order that the Bar may begin analyzing the best use of that information for communication purposes.

For programs that receive Bank Community Stabilization and Reinvestment grants, Main Benefits and Economic Benefits data collection will be required for those Bank grants beginning January 1, 2016 for reporting either quarterly or semi-annually.

I. Case Summary Report

The Case Summary Report requests information regarding all cases closed and clients you served during the calendar year ended most recently, categorized by the Legal Resolution Code and according to the type of case best described by the Legal Problem Code.

To complete this form, divide all the cases closed by your program during the calendar year ended most recently based on substantive area of the law. Once cases have been properly categorized into Legal Program Code, based on area of substantive law, tabulate the number of cases in each Problem Code according to the Legal Resolution Code representing the highest level of service or other reasons for case closure.

To complete the client profile data, enter the client characteristics according to age, ethnicity, gender and English proficiency to the extent this information is available to you. In the column titled *LEP*, report the number of clients with limited English proficiency or who were non-English speaking. In the column titled Veterans, include all persons previously served in the military or who are currently active in the military.

- **Case** is defined for the purposes of this report as a legal problem of a client and the legal activities or processes used in resolving those problems. Programs shall report related legal problems of an eligible client as a single case when the program representing the client attempts to resolve the related legal problems simultaneously through a single legal process. Where multiple actions are filed in a court or administrative proceeding to resolve the problem in different ways, the program may adhere to other funding guidelines, or use their own best judgment regarding whether the activities should be tracked as one case or multiple cases. The program should adopt protocols for case counting that are available for review. A case may include brief services such as advice, as well as other types of services including legal representation.
- **Legal Problem Codes** are organized by major topical areas assigned to legal problems. Select the category that best describes the client's legal problem. If two or more closely-related legal problems are involved in the case, the category that describes the problem requiring the greatest level of effort to resolve should be selected. The following are brief descriptions of the legal problem categories:
 1. **Conservatorship (C)** refers to all types of conservatorship proceedings, including Probate, Limited, general and Lanterman-Petris-Short Act (LPS) conservatorships.
 2. **Consumer/Finance (CF)** refers to Bankruptcy, Debtor Relief, Collections (including Repossession), Garnishment, Contracts, Warranties, Credit Access, Loans, Installment Purchase, Unfair Sales Practice, or other consumer finance matters.
 3. **Disability Rights (D)** refers to Disability, including Mental Health Rights
 4. **Domestic Violence (DV)** refers to abuse perpetrated against any of the individuals

identified in the Domestic Violence Protection Act, California Family Code §6211.

5. **Education (ED)** refers to Discipline (including Expulsion and Suspension), Special Education, Learning Disabilities, Access, and other education matters.
 6. **Employment (E)** refers to Job Discrimination, Wage Claims, Employee Rights, and other employment matters. (Note Earned Income Tax Credits should be captured under Miscellaneous)
 7. **Family (F)** refers to Adoption, Custody, Visitation, Divorce, Separation, Annulment, Parental Rights Termination, Paternity, Support, and other family matters. (Note Name Changes should be captured under Miscellaneous)
 8. **Guardianship (G)** refers to cases brought by persons other than the child's parent seeking to be appointed guardian of a minor by the probate or other court.
 9. **Health and Long-Term Care (HL)** refers to Medicare, Medicaid, Medi-Cal, and other health and long-term care matters.
 10. **Housing (HO)** refers to Federally-Subsidized Housing Rights, Foreclosure or Title Fraud, Landlord-Tenant (including Foreclosure Evictions), Public Housing, Homelessness, and other housing matters.
 11. **Immigration (I)** refers to Naturalization, Asylum, Adjustment of Status, Citizenship, Family Petition, Special Immigrant Juvenile Status, Trafficking, T-Visa, U-Visa, and other immigration matters.
 12. **Income Maintenance (IM)** refers to CalWorks, Food Stamps, Social Security, SSI, Unemployment Compensation, Veterans Benefits, Workers' Compensation, and other income maintenance matters.
 13. **Juvenile (J)** refers to obtaining adoption, or emancipation, delinquent, neglected, abused, dependent, and other juvenile matters.
 14. **Miscellaneous (M)** includes Incorporation, Corporate Dissolution, Indian and Tribal Law, License (auto and others), Taxes, Torts, Wills, Estates, Prisoners' Rights, and other individual rights matters.
 15. **Access to Justice (AJ)** includes measurable benefits that could not be captured in other substantive areas. These benefits might consist of increased individual access or a much broader impact than to the individual served.
- **Closed Case** is a case in which there is a resolution of the client's problem or in which the client's problem is not resolved but it is determined that no further action will be taken on the case.
 - **Legal Resolution** identifies the highest level of service provided by the program before the case was closed.

Limited Services Case Categories

- ***Counsel and Advice*** includes preparing and providing advice to the client, reviewing relevant information, and counseling the client on how to take action to resolve the issue.
- ***Limited Action*** refers to services provided to a client that involved preparation of relatively simple or routine documents and relatively brief interactions with other parties. Examples include preparing short letters, drafting a routine will or power of attorney, making a telephone call, or helping a pro se client prepare court or other legal documents.

Extended Services Case Categories

- ***Negotiated Settlement without Litigation*** applies to those cases in which the program negotiated and reached an actual settlement on behalf of a client prior to the initiation of a court or administrative action.
- ***Negotiated Settlement with Litigation*** applies to those cases in which the program negotiated and reached an actual settlement on behalf of a client after initiation of a court or administrative action -- e.g., resolution of a dispute after suit has been filed.
- ***Administrative Agency Decision*** applies to all cases in which the program represented 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.
- ***Court Decision*** applies to all cases in which the program represented a client that resulted in a case dispositive decision made by the court.
- ***Extensive Service*** (not resulting in settlement, court or administrative action) applies in cases where the program undertook extensive activities (research, preparation of complex legal documents, interaction with third parties on behalf of the client, ongoing assistance to clients, etc.) that did not conclude with a negotiated settlement or a decision from an administrative agency or court. Cases in which an order of withdrawal or voluntary dismissal is entered should also be closed in this category.

For all services closed under an “Extended Service” category, identify the Benefits achieved. See Sections III and IV below.

Other Reasons Why Case Was Closed

This describes the circumstances or events causing the program to determine that no further action is to be taken on the case for reasons not included in the previous categories.

II. Narrative Evaluation Report

Evaluation reporting forms for the 2015 year will be released in January for a submission due date in March 2016. Those forms will be the last documents administered outside of the online SmartSimple platform, and will be emailed to programs in Word and Excel format. A copy of *prior year forms is attached as an example*, Exhibit B. A new form for 2015 will be released in January.

For evaluation of the 2016 year, the Narrative Evaluation Report Form will be streamlined to dovetail with the Main Benefits data that also will be collected for the 2016 grant year. Those forms will be released on SmartSimple in the middle of 2016.

III. Main Benefits (Outcomes)

Guiding Principles: Main Benefits will be collected in the same substantive areas as CSRs.

1. **Report Main Benefits for Organization, not just Trust Funds:** Organizations should report on benefits from qualified activities for the entire organization, not just those activities funded by the Trust Fund Program.
2. **Report on as Many Benefits as Achieved:** If several benefits to the client were achieved through one service, at a minimum, choose the one that best describes the benefit that was achieved. However, if several benefits to the client were achieved through one service *and* the organization's case management system (CMS) has the capacity, then check off as many benefits as achieved.
3. **Choose Specific over General:** If there is a main benefit option that is specific and one that is general, choose the specific over the general to avoid double-counting. E.g., the "other benefit" category is only used if there is not a more specific option that is available.
4. **Report on Benefits from Extended Services Only:** Main benefits will be captured in the context of extended services only. (While counsel and advice in and of itself is an important benefit conferred on the person seeking assistance, because that benefit is generally the same as the service conferred, advocates should count counsel and advice as a service in the Case Status Report (CSR), and not in the Main Benefits section.)
5. **Outcome at the Time Service Complete:** Main benefit information pertains only to the benefits achieved as of the time the service is complete.
6. **Fit Benefits to Program Priorities:** The main benefits are organized by substantive area of law for ease of reference only. Many of the described benefits could logically be placed in multiple areas. Each organization should review all the main benefits and adopt

benefits described under different substantive areas, or delete any benefits that fall outside of the organization's programmatic goals.

7. **Descriptions are Only Guidelines:** The number of benefits are deliberately collected in broad categories to simplify data collection. Within these broad categories, the descriptions are intended to provide guidance and to standardize the way in which advocates report main benefits. The descriptions provide examples, but should not be read as the complete list of all included benefits. Advocates should familiarize themselves with the benefit categories.
8. **Avoid Double Counting:** If the main benefit has already been captured under one substantive heading, do not duplicate that accomplishment by marking the same accomplishment in another substantive area – that would result in double-counting when the Trust Fund Program combines the data into one report.
9. **Construe the Words Logically, not Technically:** For example, “Obtained, preserved, increased” might be selected as a benefit if a reduction in benefits is less than it would have been without legal aid's help, even if the result, strictly viewed, does not necessarily fall under “obtained,” “increased” or “preserved.”
10. **Reporting on Impact and Policy Work:** The main benefit codes are not developed to capture major policy change or the significance of impact work. Because counting an impact case as one benefit does not nearly capture the work, count the work as a main benefit, but also describe any significant impact work, including the number of people likely impacted, in response to narrative questions in the evaluation report.
11. The way that benefits are reported will always be a judgment call. **Advocates should use their best, conservative, professional judgment in identifying main benefits achieved.**
12. **Report on individuals and households (or number of persons impacted) in the same way.** At this time, we only are collecting main benefits by case. Therefore, regardless of whether only one individual was impacted, or a family of five was impacted, the main benefit should only be marked once for the case. **If you also are able to separately collect the number of persons impacted by each service, please additionally provide that information. Do not provide it instead because that will hurt our ability to report the numbers.**

IV. Economic Benefits

This chart requires estimates of the monetary value by which the client benefitted. Note that the outcome in many cases cannot be easily valued in dollar terms. We are only asking you to estimate the monetary value where the “recovery” can be tied to an objective standard.

On a pilot basis, please report on the following areas that have been identified as appropriate for reporting: Child/spousal support, Employment, Landlord/Tenant and Foreclosure, Bankruptcy and Consumer, Income Maintenance and any other monetary amounts you

choose to report.

The chart is divided between the value of any recovery *for* the client and the reduction of any amount claimed *from* the client. Do not repeat the same amount in recovery for the client and reduction of the amount claimed from the client as that will result in double counting.

Those categories are further divided between those awards that can be articulated as a lump sum amount (or which set amount can be calculated based on the set amount over a defined period of time for recovery) and those awards that can only be articulated on a monthly basis for an unknown period of time. Do not repeat the same recovery in lump sum and monthly terms as that will result in double counting.

The chart below describes and provides guidelines for the Economic Benefit numbers sought. The committee endeavored to describe standard ways for articulating the information, both as an example and guideline to ensure consistency. This is a work in progress. **Advocates should use their best, conservative, professional judgment in identifying main benefits achieved.**

	Enter award/settlement (or the dollar value of same), not the cost savings from preventing or reducing a claim or judgment amount.		Enter savings achieved for client by preventing or reducing a claim or judgment amount, not the award/settlement (or the dollar value of same).	
	Back Awards & Lump-Sum Settlement	Monthly Benefits Obtained - Do not Annualize	Reduction or Elimination of Claimed Amounts	Monthly Cost Savings and Payment Reductions
Consumer & Bankruptcy				
Bankruptcy	Amount recovered for creditors		Amount of debt discharged	
Debt Collection, Garnishment or levy	Amount of any cash settlement or judgment.		Amount of debt avoided; amount of garnishment or levy prevented	Amount of monthly garnishment prevented, if total amount is not eliminated
Unfair, Deceptive Practices, Warranties or Contracts	Amount of any cash settlement or judgment.		Amount of contract enforced or prevented	
Employment				
This includes individual recovery as well as recovery for broader groups, such as through FLSA collective actions, PGA, or through class action.	Judgment or settlement in wage and hour matter, discrimination or any other employment matter	Reinstatement in an employment matter based on monthly salary		
Family				
Child Support Spousal Support (Note, we are not asking for value of property distributions because there are too many assumptions with respect to the property distribution that the client would have been able to achieve without legal aid)	Client receives an order for monthly dollar amount for child or spousal support over a specific period of time (eg. a child support order when the child is over 17 years old and it seems unlikely that there will be a modification). Calculate the amount and place under "back awards & lump-sum" even if it will be paid over a period of years because the payments can be translated into a set award amount.	Client receives an order for monthly dollar amount for spousal support, no time duration defined. Use this column even if client receives an order for a monthly dollar amount for child support (child under 17), such as until the child turns 18, graduates from high school or emancipates.		

Health and Long-term Care				
Eligibility and coverage for medical services and care	Amount of recovery from insurance		Amount of debt discharged	
IHSS				
Housing				
Landlord/Tenant	Amount of any cash settlement or judgment, including moving expenses or return of disputed (or undisputed) security deposit. If agreement or judgment allows tenant to stay in home for a number of months with a waiver or reduction in rent, then include calculation that is based on length of time multiplied by amount of rent.	May include value of retaining voucher or other housing subsidy. Voucher value should be estimated based on the difference between current income and HUD Fair Market Rent for the metropolitan area.	If tenant retains housing and obtains a waiver or reduction of rent due, then calculate the amount based on the length of time multiplied by monthly rent. Can include amount of any attorney's fees or costs avoided (based on demand).	
Foreclosure	Amount of any cash settlement or judgment, including moving expenses. If agreement or judgment allows tenant of foreclosed home to stay in home for a number of months with a waiver or reduction in (future) rent, then include calculation that is based on length of time multiplied by rental value.		Amount of any cash settlement or judgment for liability under existing lease and/or back rent waived. Reduction in monthly payment through loan modification, multiplied by number of years.	
Other (Includes Affordable Housing, Discrimination)				
Income Maintenance				
Disability or age-related Benefit (includes SSI/SSDI/SDI, CAPI, workers compensation and retirement benefits)	Lump sum or retroactive recovery	Monthly benefit amount won or retained	Claimed overpayment is reduced or waived	
Maintain Economic Self-sufficiency (includes general relief, CalWorks, unemployment, homeless assistance, family leave and pension. Also includes SSA Child benefits)	Lump sum or retroactive recovery; include value of services (eg, the tuition value of a training program)	Monthly benefit amount (convert weekly recovery to monthly, if necessary.)	Claimed overpayment, such as UIB or GA overpayment, is reduced or waived	
Foster Care (includes Kin-GAP, AAP, AFDC, ARC and other sources of FC)	Lump sum or retroactive recovery	Monthly benefit amount	Claimed overpayment is reduced or waived	
Relieve Hunger (includes CalFresh and WIC)	Lump sum or retroactive recovery	Monthly benefit amount	Claimed overpayment is reduced or waived	
Veteran's Benefits	Retroactive recovery	Monthly benefit amount	Claimed overpayment is reduced or waived	
Other Income Maintenance (eg victim's compensation)				
Miscellaneous				
Federal or State Tax Liability	Amounts received		Liability reduced	
Other Judgments, Settlements & Awards				

V. Training and Resources

A videoconference meeting is scheduled for Monday, December 7 from 11:00 – 2:30 in the State Bar Offices in San Francisco and Los Angeles. At that time, the Commission, members of the Reboot Committee and staff will answer questions regarding the Evaluation process. Programs involved in the pilot of main benefits will be on hand to discuss their experiences, and participants will be given an opportunity to share best practices and provide each other with assistance.

Attachments:

- A: Case Summary Report Form
- B: 2014 EAF Evaluation Forms (Sample)
- C: Main Benefits List
- D: Economic Benefit Form
- E: Sample Main Benefit Resources
 - Los Angeles Center for Law & Justice
 - Alliance for Children's Rights
 - University of San Diego School of Law Legal Clinics
 - Public Counsel

**EQUAL ACCESS FUND
REPORTING AND EVALUATION FORM
OCTOBER 1, 2013 – SEPTEMBER 30, 2014**

GENERAL INSTRUCTIONS

Use this form is to report on services and findings for all projects supported with EAF grant funds.

- Complete a separate form for each EAF-funded project.
- All projects should report on their services and findings for the 12-month period from October 1, 2013 through September 30, 2014.

To complete this form:

- Use the mouse, Tab key or arrow keys to move your cursor from field to field.
- Questions and other text are protected but you can type unlimited information into the designated form fields (gray boxes).
- Please provide complete, but concise, responses.
- Section-specific instructions appear at the beginning of each section.

This form will be posted at <http://www.calbar.ca.gov/AboutUs/LegalAidGrants/ReportingForms> no later than October 20, 2014. **Do not convert** the posted forms to another format.

Please send a hard copy of the completed Reporting and Evaluation Form(s) to the Legal Services Trust Fund Program **no later than Tuesday, November 25, 2014** and email completed forms in **Microsoft Word format only** to trustfundprogram@calbar.ca.gov.

**EQUAL ACCESS FUND
REPORTING AND EVALUATION FORM
OCTOBER 1, 2013 – SEPTEMBER 30, 2014**

PROGRAM NAME:

I. Project Name:

Contact Person and Title:

Contact Telephone:

Contact Email:

II. Project Description

- Project Specifics: Staff structure, hours of service, constituency served, general nature of services provided and method for delivering services, outreach efforts, etc.

- Project Goals: What were your qualitative goals (desired impacts) and quantitative goals (desired service levels or other quantifiable measures) for the reporting period? These should correspond to the goals stated in your approved budget proposal. For qualified legal services projects, the goals should also describe plans to use 20 percent of the grant award on behalf of particularly underserved individuals.

III. Project Results

- What were the project's actual results during the reporting period? Your description should reflect the nature and extent of the services actually provided through this project.

- To what extent did actual performance meet program goals for this project, including your plans to provide service for particularly underserved individuals?

- Describe reasons for any deviation(s) between your approved proposal and the project as it was actually implemented. If funding reductions impacted performance, provide relevant details.

IV. Evaluation Methodology and Findings

- Data: What data did you use to assess the effectiveness of this project?

- Tools: What tools did you use to gather the data (i.e., surveys, focus groups, case counts, interviews, etc.)?

- Analysis: How did you use the information that was collected?
- Lessons Learned: What have you learned from the implementation of this project in terms of results achieved, tactics that proved effective or ineffective, or surprises encountered along the way?
- Project Evolution: Was the project fully implemented as described in your approved budget proposal? If not, explain any changes that were made over the reporting period, or are planned for future operations.

V. Participation of Other Partners

Identify the roles played by other organizations or individuals that assumed **significant** responsibility for executing this project. Partners may include other service providers, volunteers, or courts or government agencies.

- Primary Partner:
- Secondary Partners:
- Other Significant Partners:

VI. Data Trends

Complete the following charts with data for this reporting period.

A. Funding:

- **Total Project Funding**: Include the total amount of cash support from all sources that your program expended to implement this project for this reporting period.
- **EAF Funding**: Identify the amount of EAF funding allocated to this project during this reporting period. This amount should include the grant year allocation, as well as any funds carried over from the previous grant year.
- **Unspent Funds**: Identify any EAF funds allocated to this project that remains unspent at the end of the 2013-14 grant year.

FUNDING		
Total Project Funding	EAF Funding	Unspent Funds
\$	\$	\$

- **Ongoing Funding**: Do you intend to continue funding this project with your 2014-15 Equal Access Fund allocation? Yes No

B. Staffing:

For this reporting period, identify all attorneys, paralegals (including law students), and other staff assigned to this project by the total number of individuals and their full-time equivalents (e.g., 3 attorneys; 2.5 FTEs). Also, report the number of active volunteers and their total hours (e.g., 20 attorneys; 300 hours).

STAFFING							
Attorney(s)		Paralegal(s)		Other		Volunteers	
Number	FTE	Number	FTE	Number	FTE	Number	Hours

C. Services Provided:

- **Cases Closed:** Identify the number of cases closed in this reporting period. Do not include cases that were still open at the end of the reporting period, or non-case work.
- **Hotline Calls:** Report the number of project-related hotline calls received in this reporting period.
- **Self-Help:** Identify the number of individuals provided with assistance intended to enable them to resolve their own legal issues as pro per litigants.
- **Workshops or Clinics:** Identify the total number of workshops or clinics held and the total number of individuals who were served through workshops or clinics.
- **Outreach Events:** Identify the total number of outreach events and the number of individuals contacted at those events.

SERVICES PROVIDED						
Cases Closed	Hotline Calls	Self-Help Customers	Workshops/Clinics		Outreach Events	
			Number Held	Number Served	Number Held	Number Reached

- **Other Results:** Describe briefly other results achieved by this project, if applicable (e.g., drafted model code, developed training curriculum, etc.).

VII. Vignettes

Please provide two narrative examples of typical cases or matters that this project actually handled in this reporting period.

- Vignettes can highlight any work performed by your project, including:
 - standard one-on-one advice or representation;
 - a case or project with significant impact on an eligible population; or
 - other services, such as community legal education, pro per assistance, web-based services, or training of legal services advocates.
- Vignettes should identify a result, such as:
 - the resolution of a case;

- milestones or impacts, such as a court ruling, a negotiated settlement, a change in behavior by a major employer of low-income people, etc.; or
 - a description of how services actually changed conditions for beneficiaries of the services provided.
- Vignettes should:
 - describe services actually provided during this reporting period; and
 - show how your services met the needs of the population targeted by your project.
 - Vignette 1:
 - Vignette 2:

Please send copies of any available news clippings or other descriptive materials related to the examples you have provided here.

**California Main Benefit Codes
November 9, 2015**

Conservatorship

- C1. Obtained or preserved conservatorship**
Includes all types of conservatorship proceedings, including LPS, general, and limited conservatorships, where the conservatorship is granted, conservator is reappointed, request to terminate is denied
- C2. Prevented or ended conservatorship**
Includes all types of conservatorship proceedings, including LPS, Probate and limited developmental disability, where the conservatorship is denied or not continued.
- C3. Obtained protection from abuse or neglect in conservatorship context**
Includes removed conservator who violated rights of conservatee; obtained conservatorship because of abuse or neglect; obtained a restraining order (temporary and/or after-hearing) to prevent elder or dependent adult abuse; and removed an abusive agent under power of attorney.
- C4. Obtained other benefit in a Conservatorship matter**
Includes added co-conservator to existing conservatorship, responded to OSC re failure to file an accounting and other benefits not described above. Use this category ONLY if your matter does not match another defined category.

Consumer/Finance

- CF1. Obtained federal bankruptcy protection**
Includes obtained discharge of debt; prevailed in adversarial proceeding or otherwise secured federal bankruptcy protection.
- CF2. Prevented repossession, prevented or reduced deficiency judgments (secured or unsecured, not housing)**
Includes prevented repossessed vehicle or personal property, provided relief from defective notices, and defective sales procedures.
- CF3. Ended or reduced debt collection or wage garnishment and enforcement of fair debt collection**
Includes ended or reduced garnishment or levy, and enforced state and federal fair debt collection rights. Includes "stop contact" letters, and stopped creditor harassment of consumer, regardless of whether or not debt ended or reduced. Issues may involve credit card debt, medical debt, or student loans.
- CF4. Obtained relief from fraudulent sales practices or unlawful, unfair or deceptive acts or practices**
Includes unfair and deceptive acts and practices, predatory lending, credit discrimination, and general consumer scams. Issues may involve proprietary trade schools, immigration consultant fraud, auto fraud, credit card contracts, and telemarketing fraud. (Use best judgment whether matter is best reported here or as a breach of contract in number CF5 below.)
- CF5. Enforced sales contracts and/or warranties, including breach of contract**
Includes enforced sales contracts, established claims under auto and personal property warranty, and other consumer contract issues. (Use best judgment regarding whether your matter belongs here or in CF4 above.)

- CF6. Obtained or preserved credit, or resolved credit reporting errors**
Includes prevented negative consumer reporting, such as the reporting of an eviction to a landlord registry.
- CF7. Prevented or delayed utility termination, or obtained utility services**
- CF8. Resolved issues related to identity theft**
Includes obtained fraud alerts on credit reports, drafted reinvestigation letters, and resolved other identity theft issues
- CF9. Obtained protection from financial abuse**
Includes resolved finance abuse related to domestic violence and abuse of elders, dependent adults, and children.
- CF10. Obtained reasonable and affordable loan**
Includes obtained modifications of existing loans or obligations as well as new loans, obligations or extensions of credit; includes secured and unsecured loans. Issues may include real property related loans or loans related to automobiles or other personal property.
- CF11. Obtained other consumer benefit**
Please use this category ONLY if your matter does not match another defined category.

Disability Rights

- D1. Obtained, preserved or improved rights of institutionalized persons**
Includes access to disability services while institutionalized, statutory and constitutional rights while institutionalized, right to treatment in least restrictive setting, and release from institution. Does not include prisoner rights and jail conditions, which are identified under "Miscellaneous."
- D2. Obtained, preserved or improved access to public facilities/accommodations**
Includes ADA claims and similar state statutory claims against place of public accommodation. Does not include housing accommodations, or discrimination claims, which are identified under "Housing."
- D3. Obtained, preserved or improved access to government services/accommodations**
Includes ADA, Section 504 of the Rehabilitation Act of 1973 and similar state statutory claims against governmental entities. Does not include employment discrimination, reasonable accommodation claims identified under "Employment."
- D4. Obtained, preserved or increased community residential & support services**
Includes access to appropriate community residential and support services including those to avoid placement in an institution; includes access to regional center services. Does not include leaving an institution, which is covered under D1 above. Does not include access to services included in "Health and Long-term Care," "Education," "Housing" and "Employment."
- D5. Obtained other benefits (or rights) for person with disabilities**
Does not include benefits included in "Health and Long-term Care," "Education" and "Employment" categories. Use this category ONLY if your matter does not match another defined category.

Domestic Violence

- DV1. Obtained protection from abuse and neglect in a domestic violence context**
Includes obtained a restraining order (temporary and/or after-hearing) to prevent domestic violence. also includes other relief that can be requested under the DVPA (Domestic Violence Prevention Act), such as relinquishment of firearms, and orders to prevent child abduction.
- DV2. Obtained other services and benefits to protect from abuse or neglect**
Includes obtained accommodations or accessed rights in housing, workplace, education and other remedies not included in the DVPA, such as statutory right to break lease in circumstance of domestic violence; obtained DV-related protections from job discrimination; obtained assistance with safety planning.
- DV3. Prevented issuance or Obtained Termination of Protective Order (Family)**
Includes avoided or reversed administrative finding of child abuse/neglect and termination of order pursuant to DVPA.

Education

- ED1. Prevented, reduced or reversed suspension or expulsion**
Includes all areas related to school discipline: advocated for students at a manifestation determination and/or expulsion hearing; worked with Districts to implement alternatives to suspension and/or expulsion; and, enforced student's due process rights.
- ED2. Obtained enrollment in school**
Includes eliminated barriers to getting into school, such as obtained services to address healthcare issues; got a special letter; ensured access to either early intervention, general education or special education.
- ED3. Obtained, improved or increased special education services, i.e., individualized education program (IEP) and individual family service plan (IFSP) or other appropriate services or placements consistent with law**
Includes enforced parent's or educational holder's rights at due process proceedings or other appropriate venues, and combated noncompliance or systemic discrimination utilizing Compliance Complaints. Also includes obtained least restrictive environment, or prevented inappropriate special education classification, such as ensuring that student's eligibility category appropriately reflects the student's needs and impairments.
- ED4. Obtained, improved or increased accommodations or other services under Section 504 or the ADA**
Includes advocated for a range of appropriate services and accommodations; enforced parent's or educational holder's rights to oppose a 504 decision by utilizing the hearing process; combated discriminatory conduct by filing OCR complaints with compensatory remedies. (Does not include post-secondary education outcomes from 504 work, which should be captured in ED5 below)
- ED5. Obtained, improved or increased access to post-secondary education or reduced barriers to post-secondary education**
Pertains to services to help achieve admission to post-secondary education, e.g., advocated for students to receive accommodations on "high stakes" exams such as the SAT and ACT; includes reduced barriers within post-secondary education; ensured that student has sufficient 504 and ADA accommodations when entering higher education; and obtained foster education-related benefits such as scholarships, loan forgiveness and other financial assistance to attend school. (Does not include efforts to help students graduate which should be placed in ED6 below.)
- ED6. Obtained, increased or improved other education-related benefits or rights**

Includes efforts to help students stay on track to graduate, removed barriers to graduation, obtained access to and clarified records, credit recovery or obtained graduation credits, including enforcing AB167 rights for partial credits and/or early graduation; obtained access to extra-curricular activities, interpreter and translation services; increased and improved access to transition services; advocated for foster children impacted by changes in foster home placements; protected the rights of students who are victims of bullying; includes obtained OCR- or CDE-ordered remedy of training for school staff on the rights of special education students; protected FAPE rights of special education students in juvenile detention; facilitated coordination between school staff and other service agencies, including working with the public defender's office. Use this category ONLY if your matter does not match another defined category.

Employment

- E1. Obtained unpaid wages due**
Includes represented at administrative hearing and in litigation that resulted in recovery of lost wages due to underpayment or wage theft.
- E2. Overcame or obtained relief from job discrimination, harassment, and/or retaliation and/or other adverse employment action**
Includes represented and obtained court judgment around FEHA, ADA, Title VII and other workplace protections that address discrimination, harassment and retaliation. Also includes negotiated informally with employer to prevent further adverse action and ensured compliance with employment protections. Includes activities that resulted in monetary payment to client. (Does not include obtaining disability or age related benefit, which should be reported under "Income Maintenance.")
- E3. Improved employer's compliance with employment law and best practices**
Includes activities that resulted in workplace-wide change in practices and policies. Use a different benefit if the employer only improved handling in regard to the individual client's circumstance.
- E4. Overcame or obtained relief from health and safety violation**
Includes represented and obtained court judgment around state and federal OSHA protections. Also includes accomplished relief through Cal/OSHA fines, orders or health and safety inspection.
- E5. Obtained, preserved, enforced worker's rights under collective bargaining when union not advocating for member**
Includes represented and obtained relief from the NLRB.
- E6. Removed disability-related barriers to employment**
Includes obtained reasonable accommodation to prevent someone from losing a job or helping someone keep a job; includes vocational rehabilitation services. (Does not include SSI or other employment related benefits, which should be included in Income Maintenance, IN3 below)
- E7. Obtained other benefits in employment matter**
Includes benefits not captured by other main benefits categories above, such as delayed discharge or prolonged health benefits; includes wrongful termination or employment-related tort claims outside of job discrimination, harassment or retaliation. Use this category ONLY if your matter does not match another defined category.

Family

- F1. Obtained or preserved custody of child(ren)**

Includes both legal and physical custody; "preserved" includes cases that resulted in client's custody being reduced but still maintained at some level

F2. Obtained, preserved or increased visitation rights

"Preserved" includes defending against an action to deny visitation to parent, even if the result is less visitation; includes actions to enforce visitation orders

F3. Obtained protection from abuse or neglect

Includes obtained an order for supervised or restricted visitation of children. Includes family law relief that is not included in the DVPA.

F4. Obtained a divorce, separation, or annulment

Includes assisted with negotiating settlement agreement

F5. Obtained, preserved, or increased child support

"Preserved" includes cases that resulted in client receiving less support, but maintaining it at some level

F6. Obtained, preserved or increased household income and assets

Includes *distribution* of marital property, including retirement benefits, pension plans, health insurance or other benefits or debt, but not efforts to obtain *new* government or private benefits, which should be reported under an income maintenance benefit; includes cases where assisted with divorce or cases where dealt only with assets; includes spousal support, including its downward modification; but does not include obtained child support which should be included in F5, above.

F7. Obtained downward modification of child support

F8. Established parentage for a child

F9. Obtained other benefit in a family law matter

Includes modified or enforced non-custody orders, and obtained other benefits such as test evaluations, appointment of minor's counsel and other ancillary orders related to children. Use this category ONLY if your matter does not match another defined category.

Guardianship

G1. Obtained or preserved guardianship.

Includes cases where guardianship is granted, successor guardian is appointed, joint-guardian is appointed, request to terminate is denied

G2. Obtained, preserved or increased visitation rights

Includes grandparent, parent, caregiver or other visitation requests that are granted

G3. Prevented or ended guardianship

Includes prevented creation of guardianship or termination of guardianship

G4. Obtained protection from abuse or neglect in a guardianship context

Includes prevented visitation, including prevented visitation due to distress, even if there is no abuse or neglect.

Health and Long-term Care

HL1. Obtained or preserved eligibility under publicly funded health insurance

Includes reduced MediCal share of cost, overcame denial of medical services, obtained HMO Services/Rights; programs include Medicare, Medicaid or MediCal, EPSDT, Child Health Disability

Prevention Program (CHDP), Targeted Low-Income Children's Program, California Children's Services (CCS), county insurance programs such as county W&I 17,000 and local programs; IHSS benefits; Home and Community Based Services Waiver Program (HCBS); government health insurance premium payment programs such as Medicare Savings Program, OA-HIPP and ADAP.

HL2. Obtained or preserved coverage under private insurance

Includes private insurance, employer based insurance, and Covered California; includes private health insurance premium payment programs such as OA-HIPP and ADAP

HL3. Increased access to health services

Includes publicly funded or private health insurance

HL4. Obtained or preserved eligibility for long-term care services

Includes publicly funded or private health insurance

HL5. Increased access to long-term care services

Includes publicly funded or private health insurance

HL6. Obtained protection from abuse and neglect in a Health and Long-term Care context

Includes protection from abuse and neglect in nursing home and other institutions and facilities.

HL7. Obtained other benefit on a health matter

Includes prevented premature hospital discharge; prevented inappropriate discharge (patient dumping); assured quality care. Use this category ONLY if your matter does not match another defined category.

Housing

Housing includes direct benefits to individual clients. Services that benefit organizations or whole communities generally should be captured under "Miscellaneous" category at M4.

HO1. Prevented loss of current housing

Kept client in a home; prevented eviction (eviction defense) or prevented foreclosure, including represented and/or advocated for client during the notice stage, i.e., before filing of unlawful detainer

HO2. Negotiated or facilitated move out to provide "soft landing"

Includes negotiated settlements, asserted defenses and procedural rights, and delayed foreclosure to help client avoid homelessness and/or transition to replacement housing. Also includes represented and/or advocated for the client during the notice stage, i.e., before filing of unlawful detainer. Results achieved may include time to move out (with or without payment of rent during that time); waiver of rent due; return of security deposit; money provided to move out; relocation payments; and kept eviction from being entered into the public record.

HO3. Obtained or preserved access to housing

Includes obtained or maintained eligibility for all types of public, subsidized, deed restricted or other affordable housing units or housing vouchers.

- H04. Prevented, ended or obtained relief from unfair or illegal behavior, or otherwise enforced rights or obtained remedies related to housing**
Includes enforced fair housing laws, local law, regulations and rent ordinances through informal advocacy, formal administrative proceeding or filing affirmative lawsuits; includes prevented illegal rent increase, improper calculation of tenant's income to determine rent and utility payment amounts, improper determination of household size and appropriate size unit etc. Also includes prevented unlawful discrimination; ended lockout; ensured return of security deposits and/or access to personal property; enforced DV survivor's right to break a lease.
- H05. Enforced rights to safe and habitable housing**
Includes enforced housing, health, and safety codes, prevented utility shut offs, obtained repairs or improved conditions.
- H06. Obtained, preserved, enforced rights of a landlord over a tenant**
Includes assisted vulnerable landlords (low-income, elderly) with evicting a tenant or enforcing a lease provision.
- H07. Obtained relief from foreclosure or property scam**
Includes delayed the impact of foreclosure to help client avoid homelessness and/or transition to replacement housing; includes obtained relief from rent skimming
- H08. Resolved property title dispute**
Includes quieted title, achieved partition, constructive trusts, or specific performance; resolved slander of title, adverse possession, boundary line or prescriptive easement issues.
- H09. Obtained other housing benefit**
Includes obtained access to transitional housing or shelter. Please use this category ONLY if your matter does not match another defined category.

Immigration

- I1. Prevented deportation**
Includes EOIR (at IJ and BIA level), or before DHS/ICE or the Federal Courts that resulted in an order allowing the person to remain in the US. Underlying applications for relief that led to favorable resolution may include adjusted status, asylum, withholding, cancelled removal, NACARA, waiver applications and any other requests or motions that terminated removal proceedings or prevented the execution of any removal orders.
- I2. Obtained citizenship**
Includes naturalization matters or in derivative or acquired citizenship matters, which may also include certificates of citizenship or US passports.
- I3. Obtained asylum (withholding of removal, convention against torture)**
Includes administrative representation before USCIS leading to the acquisition of asylum as either a principal or a derivative. This includes asylum applications, *nunc pro tunc* asylum and refugee/asylee petitions for relatives, and may include work done before the US Department of State or other US Government agency, as necessary to acquire the approval and admission of the principal or the family member.
- I4. Obtained release from immigration custody**
Includes bond hearings before EOIR (at IJ and BIA level), or before DHS/ICE or the Federal Courts that resulted in an order allowing the person to be released from ICE custody.

- 15. Obtained lawful permanent residency**
Includes adjusted status, conditional permanent residency, consular processing, removal of conditions or SIJS relief; also includes obtained lawful permanent residency for derivative(s).
- 16. Obtained employment authorization**
Includes initial or renewal employment authorization documents from USCIS.
- 17. Obtained legal status or quasi-legal status**
Includes U Visa and T Visa petitions approved, and obtained quasi-legal status of VAWA self-petitioner; includes DAPA and DACA; includes SJIS; Includes assistance to principals and qualifying family members in obtaining U Visa and T Visa status, and obtained quasi-legal status under TPS, or protection or deferred action as a VAWA self-petitioner; also includes acquired deferred action status under the DAPA and DACA programs.
- 18. Obtained other immigration benefit**
Includes obtained an AB60 driver's license for an undocumented person. Also includes obtained refugee travel documents and other documents necessary for travel and return to the US, such as advance parole documents. Use this category ONLY if your matter does not match another defined category.

Income Maintenance

In the categories below, "obtained, preserved or increased" includes reduction of overpayment demands. Income Maintenance does not include child support which should be placed under Family Law F5. Also does not include education-related benefits, such as scholarships, loan forgiveness and other financial assistance to attend school, which should be placed under Education E5. Income maintenance categories include retroactive payments received under any of these benefit programs.

- IM1. Obtained, preserved, or increased foster care, Kin-GAP, or AAP (adoption assistance benefits) to which entitled**
Includes all financial benefits available to children through foster care including but not limited to: AFDC-FC, State Foster Care Funding, Approved Relative Caregiver Program (ARC), Kinship Guardianship Assistance (KinGAP), Adoption Assistance Program (AAP), Extended Foster Care (EFC) through AB12, and Supervised Independent Living Program (SILP).
- IM2. Obtained, preserved, or increased veterans or military benefits to which entitled**
- IM3. Obtained, preserved, or increased disability or age related benefit to which entitled**
Includes SSI/SSDI/SDI (including "PASS" Programs for Achieving Self-sufficiency and similar programs), CAPI, black lung, civil service retirement or disability, workers compensation, and other retirement benefits. Also includes retroactive payments received under any of these benefit programs.
- IM4. Obtained, preserved, or increased benefits to relieve hunger**
Includes CalFresh and WIC. Also includes retroactive payments received under any of these benefit programs.
- IM5. Obtained, preserved, or increased benefits to help people maintain economic self-sufficiency**
Includes all benefits that are NOT included in the categories above, that help people maintain self-sufficiency and to stay in their own homes, such as general relief, CalWorks, unemployment benefits, and Homeless Assistance Benefits; also includes paid family leave, pensions, and other non-government related benefits.
- IM6. Obtained, preserved, or increased crime victim's compensation benefit**

- IM7. Obtained, preserved, or increased other income maintenance benefits to which entitled**
Includes childcare and any other services not covered above. Includes other income benefits not covered above. Use this category ONLY if your matter does not match another defined category.

Juvenile

Includes children and youth (“youth”) in both dependency/foster care and probation/delinquency. Youth transitioning out of foster care up to 21 years of age (and in some cases up to 24 years of age) may be included.

- J1. Obtained adoption**
Includes foster care, independent and step-parent and second parent adoption
- J2. Obtained emancipation**
Includes minor who received court order prior to reaching 18 years of age. (Does not apply to foster youth who transitioned out of court jurisdiction after reaching the age of 18, which should be included in 176 below.)
- J3. Preserved or reunified family, including obtained or preserved parental rights**
Includes reunified family in dependency case, avoided removal of youth from parental custody; represented parents in the juvenile court system; preserved parental rights against potential permanent plan of adoption or guardianship;
- J4. Obtained or maintained juvenile’s independence from system involvement**
Prevented court or agency jurisdiction to supervise the youth; for example, youth is not held in a juvenile facility, such as juvenile hall, or a group home or foster home
- J5. Obtained name change, birth certificate (Miscellaneous)**
Includes amended birth certificates, delayed registrations of birth, and judicial or court ordered fact of birth
- J6. Obtained, preserved, increased stability for youth involved in foster and juvenile justice system**
Includes preserved placement or improved youth’s placement
- J7. Obtained other services or benefits for juvenile**
Includes any additional services specific to youth: child care, pregnant and parenting teen services, summer camp; includes “Independent Living Program” (ILP)/non-minor dependent services for older foster youth and non-minor dependents, such as transitional housing, financial aid, scholarships and drivers training; includes helped youth clear barriers to employment or education such as tickets (things like metro fare evasion and breaking curfew), or sealed juvenile record. Do not include medical or disability issues, which should be included in appropriate “Health and Long-term Care” or “Disability Rights” Main Benefits. Use this category ONLY if your matter does not match another defined category.

Miscellaneous Benefits

M1. Preserved or strengthened nonprofit infrastructure or expanded its capacity

Includes provided organizational and transactional support for nonprofit organizations serving income-eligible populations: obtained incorporation or dissolution; obtained tax exempt status; created corporate policies, negotiated transactions, drafted contracts, provided intellectual property, employment law or other representation that enabled the organization to continue or expand its programs.

M2. Empowered community to advocate on own behalf

Includes developed the capacity of low-income community members to advocate on behalf of their community, whether represented a nonprofit organization or a community group. Could include educated about legal requirements for community input, assisted with understanding proposed laws or legislative actions.

M3. Preserved or strengthened community through (other) community development

Includes provided organizational and transactional support for micro-businesses and low-income entrepreneurs; completed a legal transaction to benefit a low-income community; increased job opportunities in low income community; created access to services (eg childcare and credit unions); and other economic development activity. Also includes environmental justice matters, healthy living for low-income communities, equity in transit oriented development and other matters in support of the protection and development of low-income communities.

M4. Obtained, preserved, increased affordable housing

Includes represented in transactions for affordable housing development; represented in anti-NIMBY efforts for affordable housing development; negotiated affordable housing policies in local jurisdiction planning; enforced state affordable housing laws.

M5. Removed barriers that impact employment, benefits, housing and self-sufficiency

Includes overcame the taking or restriction of drivers' or other license; expunged records; kept information off records; cleared ticket or warrant; and helped people with re-entry.

M6. Obtained or increased tax benefit or prevented or reduced tax liability

Includes obtained EITC, child tax credit and other tax benefits, resolved disputes or controversies with any taxing agency, negotiated compromise of tax amounts owed, and resolved tax liability or obtained tax refunds.

M7. Obtained name change, birth certificate or gender change

Includes obtained amendment to birth certificate, delayed registrations of birth, and obtained judicial or court order of fact of birth.

M8. Obtained a living will, advance health care directive, health proxy and/or power of attorney

M9. Obtained a will

Includes assisted with probate matter or settled an estate.

M10. Obtained, preserved or increased civil rights of indigent people

Includes litigation or negotiation to protect rights of income-eligible populations.

M11. Obtained, preserved or increased Indian/Tribal rights of indigent people

M12. Obtained, preserved or increased prisoner rights

M13. Avoided or reduced tort liability or judgment

M14. Protected rights of victim in the criminal justice system

Includes obtained protections for victims of crime in interactions with law enforcement agencies, such as police, prosecutors and victim-witness programs; and obtained legal rights including with respect to privacy, return of personal property held by law enforcement, and under Marsy's law.

M15. Obtained protection from civil harassment and/or stalking

Includes obtained a restraining order (temporary and/or after-hearing) to prevent civil harassment, including stalking; also includes other relief that can be requested as part of a civil harassment restraining order, such as relinquishment of firearms.

Access to Justice (Optional)

Generally applies when advocacy resulted in measurable benefits different from those identified within the substantive area. In some cases, these benefits identify increased individual access, and in some cases they measure broader impact than to the individual served.

AJ1. Accessed client's rights to the justice system

Includes maintained privacy of records, obtained jurisdiction over a threshold issue; obtained standing for a client; prevented wrongful jurisdiction over an action; and, provided client representation in a court hearing which did not otherwise result in a measurable outcome. Use this category ONLY if your matter does not match another defined category.

AJ2. Avoided need for litigation

Includes discouraged client from filing a non-meritorious case; negotiated settlement without litigation and assisted client in finding alternate method of addressing the legal problem outside of the judicial system. Use this category ONLY if your matter does not match another defined category.

AJ3. Set legal precedent

Established case law that will affect a significant segment of the eligible population and that achieved relatively permanent improvement in the legal rights or basic conditions of those affected.

AJ4. Clarified or changed policy of government agency or improved agency's provision of services or appeals processes

Includes language access and quicker handling of claims.

AJ5. Assisted client with finding an attorney to represent him/her.

Includes helped a client tell his story so that he could get pro bono help, or found a low bono attorney to take a meritorious case. This does not include matters resolved through pro bono counsel if the benefit of that pro bono help is already captured elsewhere. Use this category ONLY if your matter does not match another defined category.

ECONOMIC BENEFITS

	Enter award/settlement (or the dollar value of same), not the cost savings from preventing or reducing a claim or judgment amount.		Enter savings achieved for client by preventing or reducing a claim or judgment amount, not the award/settlement (or the dollar value of same).	
	Back Awards & Lump-Sum Settlement	Monthly Benefits Obtained - Do not Annualize	Reduction or Elimination of Claimed Amounts	Monthly Cost Savings and Payment Reductions
Consumer & Bankruptcy				
Bankruptcy				
Debt Collection, Garnishment or levy				
Unfair, Deceptive Practices, Warranties or Contracts				
Employment				
This includes individual recovery as well as recovery for broader groups, such as through FLSA collective actions, PGA, or through class action.				
Family				
Child Support				
Spousal Support				
Health and Longterm Care				
Eligibility and coverage for medical services and care				
IHSS				
Housing				
Landlord/Tenant				
Foreclosure				
Other (Includes Affordable Housing, Discrimination)				
Income Maintenance				
Disability or age-related Benefit (includes SSI/SSDI/SDI, CAPI, workers compensation and retirement benefits)				
Maintain Economic Self-sufficiency (includes general relief, CalWorks, unemployment, homeless assistance, family leave and pension. Also includes SSA Child benefits)				
Foster Care (includes Kin-GAP or AAP, or AFDC)				
Relieve Hunger (includes CalFresh and WIC)				
Veteran's Benefits				
Other Income Maintenance (eg victim's compensation)				
Miscellaneous				
Federal or State Tax Liability				
Other Judgments, Settlements & Awards				

LEGAL OUTCOMES Client ID: _____ Closing date: _____

INSTRUCTIONS:

- a. Check as many outcomes as have been achieved in the matter.
- b. If there is an option that is specific and one that is general, choose the specific over the general.
- c. These outcomes will apply most commonly in extended services matters. However, if you achieve an outcome through counsel and advice or limited action and you know the outcome, please report that outcome below. *If you do not know the outcome, it's okay* – the work will still be counted elsewhere. Check box #109 if no outcomes are known.

Family Law

1. Obtained or preserved custody rights.
2. Obtained, preserved or increased visitation rights.
3. Obtained protection from abuse or neglect (i.e., DVPA remedies) in a family law case.
4. Obtained a divorce, separation or annulment.
5. Obtained, preserved or increased child support.
6. Obtained, preserved or increased/decreased distribution of marital property/support.
7. Obtained downward modification of child support.
8. Established parentage for a child.
9. Obtained other benefit in a family law matter.

DVPA

10. Obtained protection from abuse or neglect in a stand-alone DVPA action.
11. Obtained other services and benefits to protect from abuse or neglect.
12. Prevented issuance of a DVPA order.
- 12.a. Obtained removal of a DVPA order.
73. Obtained protection from financial abuse.

Immigration

75. Prevented deportation.
76. Obtained citizenship.
77. Obtained asylum.
78. Obtained release from immigration custody.
79. Obtained lawful permanent residency.
80. Obtained employment authorization.
81. Obtained legal status or quasi-legal status
82. Obtained other immigration benefit (e.g., AB60 driver's license, travel documents)

Education

35. Prevented, reduced or reversed suspension or expulsion.
36. Obtained enrollment in school.
37. Obtained, improved or increased special education services.
40. Obtained, increased or improved other education-related benefits or rights.

Employment

- 29. Obtained relief from job discrimination, harassment and/or other adverse employment action.
- 34. Obtained other benefits in an employment matter.

Income-Maintenance

- 41. Obtained, preserved, increased foster care, Kin-GAP or AAP benefits.
- 43. Obtained, preserved, increased disability or age-related benefits.
- 44. Obtained, preserved, increased benefits to relieve hunger (e.g., CalFresh and WIC)
- 45. Obtained, preserved, increased benefits to maintain economic self-sufficiency (e.g., GR, CalWorks)
- 46. Obtained, preserved, increased crime victim's compensation benefits.
- 48. Obtained, preserved or increased services to which entitled (e.g., childcare).
- 49. Obtained, preserved or increased other income maintenance benefits to which entitled.

Housing

- 57. Prevented loss of current housing (includes advocacy during "notice stage").
- 58. Negotiated or facilitated move out to provide "soft landing."
- 59. Obtained or preserved access to public, subsidized or other affordable housing or vouchers.
- 60. Enforced rights or obtained remedies related to housing (e.g., DV survivor's right to break lease).
- 61. Enforced rights to safe and habitable housing.

Consumer / Finance

- 67. Ended or reduced debt collection or wage garnishment.
- 70. Obtained or preserved credit, or resolved credit reporting errors.
- 71. Prevented or delayed utility termination, or obtained utility services.

Miscellaneous Outcomes

- 104. Removed barriers to participating in the justice system (fee waivers, privacy of records, standing)
- 105. Set legal precedent.
- 106. Clarified/changed govt agency policy or improved agency's provision of services or processes.
- 107. Avoided need for litigation (discouraging filing of meritless case, negotiating settlement w/o lit)
- 50. Obtained or preserved eligibility under publicly-funded health insurance.
- 91. Removed barriers that impact employment, benefits, housing and self-sufficiency.
- 94. Obtained name change, birth certificate or gender change.
- 101. Protected rights of victim in the criminal justice system.
- 102. Obtained protection from civil harassment and/or stalking.
- 17. Obtained or preserved a guardianship.
- 109. No measurable outcome achieved.
- Other legal outcome not listed here. Please describe measurable outcome achieved: _____

2015 CASE CLOSING FORM

23. Is this a Spanish Speaking family: **- If yes, how well do they speak English :**
24. At the time of closing , is the dependency case still open:
25. Is this a Good Story?
26. Office: *(choose one)*:
27. Problem Code:
28. National Index Code:
29. Date Closed:
30. Reason Closed:
31. Main Benefit Received *(if NONE type "not applicable")*
- a. ACR Main Benefit
 - b. STATE BAR MAIN BENEFIT:
32. Total Recovery Amount *(if NONE type "not applicable")*: \$
33. Monthly Recovery Amount *(if NONE type "not applicable")*: \$
34. Amount of Overpayment / Debt Avoided *(if NONE type "not applicable")*: \$
35. Monthly Savings Amount from an Overpayment / Debt Avoided *(if NONE type "not applicable")*:
\$
36. Attorney's Fees *(if NONE type "not applicable")*: \$
37. Did ACR attend any meeting or hearings? *(if yes, type of Advocacy):*
38. Court Case Number: Court (choose one):
Court Case Number: Court (choose one):
Court Case Number: Court (choose one):
39. Has the Caregiver/Client been informed that ACR is closing the file? *(choose one)*:
- a. **Explain how or why not:**
40. Has the Caregiver/Client received a copy of the final court orders? *(choose one)*:
- b. **Explain how or why not:**

2015 CASE CLOSING FORM

41. Has the Caregiver/Client been sent a closing letter? (*choose one*):

c. Explain how **or** why not:

42. Is the physical file complete? (*choose one*):

d. Explain how **or** why not:

43. Is the physical file attached? (*choose one*):

e. Explain how **or** why not:

CASE NOTES (*Brief Summary of Case, how did ACR assist?*)

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Main Benefits
As of: 11/4/2015

Main Benefit	Problem Code	Main Benefit Name
910	9	Obtained / Preserved / Increased funding
915	9	Resolved / Settled / Overcame outstanding debt
920	9	Resolved / Settled contract and Lease
925	9	Obtained Police Certificate of Fingerprint Clearance
930	9	Obtained new Social Security number
935	9	Finding of Factual of Innocence granted by court
940	9	Court dismissed citation
945	9	Completed Purchase / Lease agreement
950	9	Obtained credit report
952	9	Placed Fraud Alert with Credit Bureaus
955	9	Resolved financial problem
960	9	Resolved Identity Theft
965	9	Resolved / Avoided Consumer Fraud
980	9	SB - Prevented repossession, prevented or reduced deficiency judgments (secured or unsecured, not housing)
981	9	SB - Ended or reduced debt collection or wage garnishment
982	9	SB - Obtained relief from fraudulent sales practices or unlawful, unfair or deceptive acts or practices
983	9	SB - Enforced sales contracts and/or warranties, including breach of contract
984	9	SB - Obtained or preserved credit, or resolved credit reporting errors
985	9	SB - Prevented or delayed utility termination, or obtained utility services
986	9	SB - Resolved issues related to identity theft
987	9	SB - Obtained other consumer benefit
988	9	SB - Avoided need for litigation
1280	12	SB -Prevented, reduced or reversed suspension or expulsion
1281	12	SB - Avoided need for litigation
1300	13	Attorney Consultation
1310	13	Overcame expulsion
1311	13	ERMHS Mental Health Services
1312	13	ERMHS Residential Placement
1313	13	Education Evaluation
1325	13	Obtained eligibility for special education
1330	13	Gained appropriate special education placement and services
1331	13	Certificate of Completion
1335	13	Enrolled child in school or early education program
1340	13	Obtained Assessment - Not Spec Ed eligible
1345	13	Regional Center: Referred/Assessed – Not Eligible
1350	13	Regional Center Eligibility: Within Timeline
1355	13	Regional Center Eligibility: After Timeline
1360	13	Regional Center: Placement/Services
1365	13	Regional Center: Compensatory Services
1370	13	District Compensatory Services
1375	13	Obtained IEE

Main Benefits
As of: 11/4/2015

Main Benefit	Problem Code	Main Benefit Name
1381	13	SB - Obtained, improved or increased special education services, i.e., individualized education program (IEP) and individual family service plan (IFSP) or other appropriate services or placements consistent with law
1382	13	SB - Obtained, increased or improved other education-related benefits or rights
1383	13	SB - Avoided need for litigation
1384	13	SB - Obtained enrollment in school
1480	14	SB -Obtained enrollment in school
1481	14	SB -Obtained, improved or increased accommodations or other services under Section 504 or the ADA
1482	14	SB -Avoided need for litigation
1600	16	Obtained / Preserved / Increased educational funds
1610	16	Resolved Student Loan Default
1680	16	SB -Obtained, improved or increased access to post-secondary education or reduced barriers to post-secondary education
1681	16	SB -Avoided need for litigation
1900	19	Enrolled child in school or early education program
1910	19	Gained NCLB Funded Tutoring
1920	19	Obtained healthy / safe educational placement
1930	19	Obtained DCFS funded residential placement
1935	19	AB490: Successfully obtained Transportation Funding
1940	19	AB 490: Immediately Enrolled
1945	19	AB 490: Recovered Partial Credits
1947	19	AB 490 School of Origin
1950	19	AB 167: Successful Graduation
1953	19	AB 167 Certified
1955	19	Regular High School Graduation
1960	19	Certificate of Completion Graduation
1961	19	Graduation
1963	19	NSP-TY Enrollment in Post Secondary Education Program
1964	19	NSP-TY Enrollment in Post Vocational Program
1965	19	Informal Probation (654/725/790)
1970	19	Dual Jurisdiction
1971	19	211: Screened without Delays
1972	19	Received MDT Evaluation
1973	19	Education Evaluation
1974	19	Educational Program Attainment /Completion
1975	19	211: Screened with Delays
1976	19	Vocational Program Attainment / Completion
1981	19	SB -Obtained, improved or increased special education services, i.e., individualized education program (IEP) and individual family service plan (IFSP) or other appropriate services or placements consistent with law
1982	19	SB -Obtained, improved or increased access to post-secondary education or reduced barriers to post-secondary education
1983	19	SB -Obtained, increased or improved other education-related benefits or rights

Main Benefits
As of: 11/4/2015

Main Benefit	Problem Code	Main Benefit Name
1984	19	SB -Avoided need for litigation
1987	19	SB -Obtained enrollment in school
2400	24	Tax preparation completed
2480	24	SB -Obtained or increased tax benefit or prevented or reduced tax liability for individual (Consumer, Miscellaneous).
2481	24	SB -Avoided need for litigation
2900	29	Acquired job
2910	29	Resolved employment barrier
2911	29	Work Readiness Certificate
2913	29	Job Mentor match
2915	29	Acquired job / internship
2920	29	Provided Employment Resources
2980	29	SB -Obtained unpaid wages due
2981	29	SB -Overcame or obtained relief from job discrimination, harassment, and/or retaliation and/or other adverse employment action
2982	29	SB -Improved employer's compliance with employment law and best practices
2983	29	SB -Overcame or obtained relief from health and safety violation
2984	29	SB -Obtained, preserved, enforced worker's rights under collective bargaining when union not advocating for member
2985	29	SB -Removed disability-related barriers to employment
2986	29	SB -Obtained other benefits in employment matter
2987	29	SB -Avoided need for litigation
3009	30	Successful Non Minor Dependent Adoption Granted
3010	30	Successful foster care adoption granted
3012	30	Successful Probation Adoption Granted
3015	30	Successful adult adoption granted
3020	30	Obtained / Preserved / Increased funding rate
3080	30	SB -Obtained adoption
3081	30	SB -Obtained, preserved, increased foster care, Kin-GAP, or AAP (adoption assistance benefits) to which entitled
3082	30	SB -Prevented, reduced or eliminated overpayment demands
3083	30	SB -Obtained, preserved, or increased services to which entitled
3084	30	SB -Obtained, preserved, or increased other income maintenance benefits to which entitled
3085	30	SB -Avoided need for litigation
3301	33	Guardianship / Conserv.Obtained guardianship for disabled adult
3410	34	Obtained birth certificate
3415	34	Obtained name change
3480	34	SB -Obtained name change, birth certificate (Miscellaneous)
3481	34	SB -Removed barriers to participating in the justice system
3482	34	SB -Avoided need for litigation

Main Benefits
As of: 11/4/2015

Main Benefit	Problem Code	Main Benefit Name
3910	39	Child Care for Relative Caregiver
3915	39	Child Care for Non-Relative Caregiver
3920	39	Gained/Preserved/Increased access to child care
3925	39	Obtained advice, brief services or referral for SLACWI
4100	41	Obtained, preserved, increased stability for youth involved in juvenile justice system
4110	41	Probation costs dismissed
4115	41	Obtained Suitable Placement order
4120	41	Obtained successful 241.1 order
4125	41	Obtained / Preserved / Increased funding rate
4180	41	SB -Obtained, preserved, increased stability for youth involved in foster and juvenile justice system
4181	41	SB -Obtained other services or benefits for juvenile
4182	41	SB -Obtained, preserved, increased foster care, Kin-GAP, or AAP (adoption assistance benefits) to which entitled
4183	41	SB -Prevented, reduced or eliminated overpayment demands
4184	41	SB -Obtained, preserved, or increased services to which entitled
4185	41	SB -Obtained, preserved, or increased other income maintenance benefits to which entitled
4186	41	SB -Removed barriers to participating in the justice system
4187	41	SB -Avoided need for litigation
4200	42	Obtained / Preserved / Increased funding rate
4202	42	Obtained child protective order
4203	42	Obtained advice, brief services or referral on Juvenile matter
4205	42	Obtained, preserved, increased stability for youth involved in foster care system
4210	42	DCFS opened Voluntary Family Maintenance Agreement services
4215	42	DCFS opened VPA services
4220	42	Court opened 300 Dependency case
4225	42	Successful 388 case reopened
4230	42	Obtained ILP benefits
4235	42	Obtained home approval
4240	42	Obtained birth certificate
4245	42	Obtained overpayment waiver
4280	42	SB -Obtained, preserved, increased stability for youth involved in foster and juvenile justice system
4281	42	SB -Obtained other services or benefits for juvenile
4282	42	SB -Obtained, preserved, increased foster care, Kin-GAP, or AAP (adoption assistance benefits) to which entitled
4283	42	SB -Prevented, reduced or eliminated overpayment demands
4284	42	SB -Obtained, preserved, or increased services to which entitled
4285	42	SB -Obtained, preserved, or increased other income maintenance benefits to which entitled
4286	42	SB -Removed barriers to participating in the justice system
4287	42	SB -Set legal precedent
4288	42	SB -Clarified or changed policy of government agency or improved agency's provision of services or appeals processes
4289	42	SB -Avoided need for litigation

Main Benefits
As of: 11/4/2015

Main Benefit	Problem Code	Main Benefit Name
4300	43	Non foster care emancipation granted
4380	43	SB -Obtained emancipation
4381	43	SB -Avoided need for litigation
4400	44	Guardianship granted
4410	44	Guardianship Terminated
4480	44	SB -Obtained or preserved guardianship
4481	44	SB -Obtained, preserved or increased visitation rights
4482	44	SB -Prevented or ended guardianship
4483	44	SB -Obtained protection from abuse or neglect (Family, DV, Conservatorship, Health and Long-term Care)
4484	44	SB -Removed barriers to participating in the justice system
4485	44	SB -Avoided need for litigation
4901	49	Other Juvenile
4910	49	Court granted Sealing Petition
4915	49	Obtained - Dependency ILP services / benefits
4920	49	Obtained - Delinquency ILP services / benefits
4921	49	Obtained a CA ID
4922	49	Obtained a social security card
4924	49	Obtained DCFS records
4925	49	Resolved / Settled / Obtained relief from small claims court
4930	49	Resolved / Settled / Dismissed outstanding ticket / warrant
4935	49	Successful mentoring relationship established
4940	49	Successful mentor match provided
4945	49	Career opportunities and resources provided
4950	49	Successful AB12 re-entry
4951	49	Preserved AB12 eligibility
4960	49	PPT - Maintained / Preserved Placement
4963	49	PPT - Obtained /Preserved / Increased Services
4965	49	PPT - Obtained / Preserved Funding
4970	49	Provided EFC Info / Resouces
4980	49	SB -Removed barriers that impact employment, benefits, housing and self-sufficiency (Miscellaneous)
4981	49	SB -Removed barriers that impact employment, benefits, housing and self-sufficiency
4982	49	SB -Removed barriers to participating in the justice system
4983	49	SB -Set legal precedent
4984	49	SB -Clarified or changed policy of government agency or improved agency's provision of services or appeals processes
4985	49	SB -Avoided need for litigation
5100	51	Gained / Preserved / Increased access to Medi-Cal
5102	51	Medi-Cal Coverage for FFY under ACA
5103	51	Gained/Preserved/Increased access to Medi-Cal under ACA for FFY
5104	51	Transitioned FFY from Low Income Health Plan to Medi-Cal under ACA for FFY

Main Benefits
As of: 11/4/2015

Main Benefit	Problem Code	Main Benefit Name
5110	51	Gained / Preserved / Increased access to treatment, medication or equipment
5115	51	Gained / Preserved / Increased access to dental treatment
5120	51	Gained / Preserved / Increased reimbursement for out of pocket medical or dental expenses
5125	51	Obtained benefits of EPSDT program
5180	51	SB -Obtained or preserved eligibility under publicly funded health insurance
5181	51	SB -Obtained or preserved coverage under private insurance
5182	51	SB -Increased access to health services
5183	51	SB -Obtained other benefit on a health matter
5184	51	SB -Clarified or changed policy of government agency or improved agency's provision of services or appeals processes
5185	51	SB -Avoided need for litigation
5901	59	Obtained benefits of CCS program
5908	59	Obtained medical assessment
5910	59	Obtained/preserved/increased Regional Center Services
5911	59	Gained / Preserved / Increased access to treatment, medication or equipment
5912	59	Gained access to Healthy Way LA
5980	59	SB -Obtained or preserved eligibility under publicly funded health insurance
5981	59	SB -Obtained or preserved coverage under private insurance
5982	59	SB -Increased access to health services
5983	59	SB -Obtained other benefit on a health matter
5984	59	SB -Obtained other benefit on a health matter
6903	69	Obtained access to housing
6904	69	Resolved / Settled housing discrimination
6905	69	Obtained / Preserved transitional housing
6906	69	Assisted in documenting problems with housing
6907	69	NSP-TY Secured SILP Placement / Funding
6908	69	Resolved / Settled / Dismissed eviction
6909	69	Maintained / Preserved Housing
6910	69	Provided housing resources
6980	69	SB -Prevented loss of current housing
6981	69	SB -Negotiated or facilitated move out to provide "soft landing"
6982	69	SB -Obtained or preserved access to housing
6983	69	SB -Prevented, ended or obtained relief from unfair or illegal behavior, or otherwise enforced rights or obtained remedies related to housing
6984	69	SB -Enforced rights to safe and habitable housing
6985	69	SB -Obtained other housing benefit
6986	69	SB -Obtained, preserved, increased affordable housing (Miscellaneous)
6987	69	SB -Avoided need for litigation
7100	71	Obtained/preserved/increased AFDC/other welfare benefit funding rate
7180	71	SB -Obtained, preserved, increased benefits to help people maintain economic self-sufficiency
7181	71	SB -Prevented, reduced or eliminated overpayment demands
7182	71	SB -Obtained, preserved, or increased services to which entitled

Main Benefits
As of: 11/4/2015

Main Benefit	Problem Code	Main Benefit Name
7183	71	SB -Obtained, preserved, or increased other income maintenance benefits to which entitled
7184	71	SB -Avoided need for litigation
7201	72	Obtained / Increased / Preserved Survivor benefits or retroactive Survivor benefits
7501	75	Obtained / Increased / Preserved SSI benefits or retroactive SSI benefits
7580	75	SB -Obtained, preserved, increased disability or age related benefit to which entitled. (Income Maintenance)
7581	75	SB -Obtained, preserved, increased disability or age related benefit to which entitled
7582	75	SB -Avoided need for litigation
8101	81	Immigrant avoided deportation
8102	81	Obtained SIJS order or finding
8180	81	SB -Obtained legal status or quasi-legal status (Immigration)
8181	81	SB -Obtained citizenship
8182	81	SB -Obtained lawful permanent residency
8183	81	SB -Obtained employment authorization
8184	81	SB -Obtained legal status or quasi-legal status
8185	81	SB -Obtained other immigration benefit
8186	81	SB -Avoided need for litigation
8200	82	Gained / Preserved / Increased access to mental health services
8210	82	Gained / Preserved / Increased access to out of county mental health services
8280	82	SB -Obtained or preserved eligibility under publicly funded health insurance
8281	82	SB -Obtained or preserved coverage under private insurance
8282	82	SB -Increased access to health services
8283	82	SB -Obtained other benefit on a health matter
8284	82	SB -Avoided need for litigation
9402	94	Negotiated Settlement

Attachment E: Sample Main Benefit Resources University of San Diego School of Law Legal Clinics
 EDUCATION AND DISABILITY CLINIC - EDUCATION
FILE CLOSING FORM

NAME OF CLIENT:	
NAME OF CHILD:	
CLIENT PHONE NUMBER(S):	STUDENT:

Child/Student Profile: (circle one)

Gender:	Male	Female	Disabled: Yes	No
Age:	1) Under 18	2) Age 18-59	3) Age 60 +	
Race:	W) White	B) Black	H) Hispanic	N) Native American
				A) Asian

Legal Problem: (circle one)

1. Education

Case Outcome:

1) Counsel and Advice Only	5) Administrative agency decision
2) Limited Action	6) Court decision
3) Negotiated settlement without litigation	7) Extensive Services
4) Negotiated settlement with litigation	

Issue (circle all applicable):

Education:					
Eligibility	IEP	504	Discipline	Placement	Other

Benefits:

1. Prevented, reduced or reversed suspension or expulsion	5. Obtained, improved or increased access to post-secondary education or reduced barrier to post-secondary education
2. Obtained enrollment in school	6. Obtained, increased or improved other education-related benefits or rights.
3. Obtained, improved or increased SPED services or other appropriate services or placements	7. None
4. Obtained, improved or increased accommodations or other services under §504 or the ADA	

Required Documents: Closing Memo Closing Letter Success Story

For Office Staff only:	TRUST ACCOUNT:		Yes	No
Number of people in the household:		Total Monthly income:		
IOLTA Qualified?	Yes	No	ESL?	Yes No

Survey:

Date:	Do Not Survey	Non-Responsive	Insufficient Merit
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Date
Rev 4/15

Supervisor

Attachment E: Sample Main Benefit Resources
Public Counsel

Outcome	# matters	# individuals	Economic Value
1. Obtained, preserved, increased foster care, Kin-GAP, or AAP (adoption assistance benefits) to which entitled	-	-	\$ -
2. Obtained, preserved, increased veterans or military benefits to which entitled	-	-	\$ -
3. Obtained, preserved, increased disability or age related benefit to which entitled	21	20	\$ 134,478.18
4. Obtained, preserved, increased benefits to relieve hunger	21	404	\$ 10,722.60
5. Obtained, preserved, increased benefits to help people maintain economic self-sufficiency	18	377	\$ 2,201.92
6. Obtained, preserved, increased crime victim's compensation benefit	-	-	\$ -
7. Prevented, reduced or eliminated overpayment demands	4	25	\$ 12,022.33
8. Obtained, preserved, or increased services to which entitled	-	-	\$ -
9. Obtained, preserved, or increased other income maintenance benefits to which entitled	-	-	\$ -
TOTAL	64	826	\$ 159,425.03