

DC BAR FOUNDATION

QUARTERLY REPORT FORM RECIPIENTS OF DC PUBLIC FUNDS FY 2008

INSTRUCTIONS FOR COMPLETING THIS FORM

GENERAL: PLEASE READ THESE INSTRUCTIONS CAREFULLY BEFORE COMPLETING THIS FORM!

GENERAL: PLEASE REFER TO YOUR FY 2008 SUBGRANT AGREEMENT AND MAKE SURE THAT YOUR REPORT REFLECTS PROGRESS REQUIRED BY THAT DOCUMENT.

1. NUMBER OF PERSONS SERVED USING DC FUNDS --- THIS INCLUDES ALL PERSONS WHO RECEIVED SERVICES FROM YOU THROUGH ALL MEANS: DIRECT REPRESENTATION, COMMUNITY EDUCATION, ETC.

2. NUMBER OF PERSONS SERVED WHO WERE DC RESIDENTS – WHILE THE AIM OF THE FUNDING IS TO PROVIDE SERVICES TO DC RESIDENTS, WE RECOGNIZE THAT NON-DC RESIDENTS MAY BE SERVED FOR A NUMBER OF REASONS, INCLUDING THE FOLLOW:

- * RESIDENCE MAY HAVE CHANGED DURING THE SERVICE YEAR
- * NON-RESIDENTS MAY BE FAMILY MEMBERS OF INDIVIDUALS WHO ARE DC RESIDENTS
- * NON-RESIDENTS MAY PARTICIPATE IN COMMUNITY EDUCATION ACTIVITIES

4. NUMBER OF PERSONS NOT RECEIVING LEGAL ASSISTANCE AND REFERRED TO OTHER HELP:

--- DO NOT INCLUDE REFERRALS TO PRO BONO COUNSEL HERE. THAT DATA IS ENTERED AT 9(A).

--- ENTER REFERRALS TO NON LEGAL ASSISTNCE ONLY IF THAT WAS THE HIGHEST LEVEL OF SERVICES OFFERED. IF, FOR EXAMPLE, A PERSON RECEIVED A REFERRAL FOR SOCIAL SERVICES, AND **ALSO RECEIVED LEGAL ASSISTANCE**, COUNT THAT PERSON IN ITEM 5/ TOTAL NUMBER OF PERSONS WHOSE CASE WAS ACCEPTED FOR LEGAL ASSISTANCE, AND COUNT THEIR CASE UNDER ITEM 6/TOTAL NUMBER OF CASES ACCEPTED FOR LEGAL ASSISTANCE.

5. **LEGAL ASSISTANCE** INCLUDES ANY ACTIVITY DESIGNED TO HELP AN INDIVIDUAL UNDERSTAND OR RESOLVE A LEGAL PROBLEM. IT INCLUDES REPRESENTATION LIMITED TO ADVICE OR BRIEF SERVICE AS WELL AS ALL FORMS OF EXTENDED REPRESENTATION.

LEGAL ASSISTANCE DOES NOT INCLUDE LEGAL INFORMATION OFFERED TO AN INDIVIDUAL IN THE FORM OF A PAMPHLET OR A LETTER, OR ORAL PRESENTATIONS OR CONVERSATIONS OFFERING GENERAL LEGAL INFORMATION. THOSE ITEMS SHOULD BE RECORDED IN ITEM 10: NUMBER OF INDIVIDUALS DIRECTLY RECEIVING LEGAL INFORMATION AND SELF HELP MATERIALS.

8. **NUMBER OF CASES CLOSED BY CATEGORIES (A)(1)- (A)(4): PLEASE ENTER THE HIGHEST LEVEL OF SERVICE PROVIDED FOR EACH CASE CLOSED:**

THUS, IF A PERSON HAS BEEN REPRESENTED IN COURT AND IN THE COURSE OF THAT REPRESENTATION HAS BEEN GIVEN LEGAL ADVICE AND COUNSEL, RECORD THE CASE ONLY AS "EXTENDED REPRESENTATION," AND NOT AS BOTH LEGAL ADVICE AND EXTENDED REPRESENTATION.

LEGAL ADVICE OR COUNSEL CONSISTS OF GUIDANCE OR EXPLANATION OF OPTIONS, OFTEN WITH A RECOMMENDATION FOR A COURSE OF ACTION OFFERED IN THE CONTEXT OF THE ATTORNEY-CLIENT RELATIONSHIP, BASED ON THE SPECIFIC CIRCUMSTANCES OF THE CLIENT AND THE LAW WHICH APPLIES TO THOSE CIRCUMSTANCES. IT INCLUDES ADVICE GIVEN IN THE COURSE OF "LIMITED SCOPE REPRESENTATION," SUCH AS AN ADVICE CLINIC, IF AN ATTORNEY CLIENT RELATIONSHIP IS FORMED AND THE ASSISTANCE IS NOT MERE LEGAL INFORMATION NOT TAILORED TO THE CIRCUMSTANCE OF THE CLIENT.

BRIEF SERVICE IS ASSISTANCE SUCH AS MAKING A PHONE CALL OR WRITING A BRIEF LETTER ON THE CLIENT'S BEHALF. BRIEF SERVICE GENERALLY INVOLVES ASSISTANCE WHICH TAKES TWO HOURS OR LESS.

BRIEF SERVICE MAY TAKE PLACE IN THE CONTEXT OF **LIMITED REPRESENTATION**, IN WHICH THE CLIENT AGREES AT THE OUTSET THAT ASSISTANCE WILL BE LIMITED TO THE SERVICE THAT IS OFFERED, ALTHOUGH THE MATTER COULD CALL FOR EXTENDED REPRESENTATION.

EXTENDED REPRESENTATION IS ANY LEGAL REPRESENTATION BEYOND LEGAL ADVICE AND COUNSEL OR BRIEF SERVICE AS DEFINED ABOVE. IT MAY INCLUDE, BUT IS NOT LIMITED TO TRANSACTIONAL WORK OR NEGOTIATION, ADMINISTRATIVE REPRESENTATION, LITIGATION AND OTHER FORMS OF ADVOCACY.

THIS NUMBER IS THE NUMBER OF CASES CLOSED DURING THE QUARTER BEING REPORTED ON, EVEN IF THE CASE WAS OPENED DURING A PRIOR QUARTER OR TIME PERIOD.

9. PRO BONO ASSISTANCE

CASES PLACED REFERS TO THOSE CASES WHERE THE VOLUNTEER ATTORNEY HAS ASSUMED RESPONSIBILITY FOR THE REPRESENTATION. IT DOES NOT INCLUDE **CO-COUNSELING CASES**, WHICH IS ADDRESSED SEPARATELY IN THIS QUESTION.

10. LEGAL INFORMATION

LEGAL INFORMATION CONSISTS OF GENERAL GUIDANCE PROVIDED ONE ON ONE TO INDIVIDUALS REGARDING THEIR LEGAL RIGHTS AND RESPONSIBILITIES, AS WELL AS STEPS THAT THEY SHOULD TAKE TO RESOLVE THEIR LEGAL PROBLEM ON THEIR OWN. IT MAY BE GIVEN IN THE FORM OF A PAMPHLET, SELF-HELP PACKET, LETTER WITH GENERALIZED ADVICE OR GUIDANCE PROVIDED IN A PRO SE CLINIC. NO ATTORNEY CLIENT RELATIONSHIP IS FORMED WHEN LEGAL INFORMATION IS PROVIDED. **DO NOT INCLUDE** PARTICIPANTS IN COMMUNITY LEGAL EDUCATION SESSIONS (COVERED BY QUESTION 11) OR GENERAL DISTRIBUTION OF PAMPHLETS IN WAITING ROOMS OR THROUGH OTHER GROUPS OR ORGANIZATIONS.

12. QUANTIFYING FINANCIAL BENEFITS TO CLIENTS

THIS SECTION IS DESIGNED TO CAPTURE THE APPROXIMATE FINANCIAL BENEFITS THAT RESULTED FROM THE REPRESENTATION OF CLIENTS. IT MAY INCLUDE:

- A. THE TOTAL OF ALL SPECIFIC AWARDS OF FUNDS ORDERED OR NEGOTIATED ON BEHALF OF CLIENTS (FOR EXAMPLE, AN AWARD OF BACK SSI BENEFITS IN A SPECIFIC AMOUNT, OR AN AWARD OF DAMAGES);
- B. THE ANNUAL AMOUNT OF FUNDS THAT A CLIENT WILL RECEIVE IN A YEAR, IF AN AWARD, ORDER, RULING OR NEGOTIATED AGREEMENT OR SETTLEMENT IS COMPLIED WITH (FOR EXAMPLE, AN ORDER OF CHILD SUPPORT, OR AN AWARD OF A MONTHLY SOCIAL SECURITY PAYMENT OR OF FOOD STAMPS. YOU DO NOT HAVE TO VERIFY THAT FUNDS WERE TRANSFERRED, SO LONG AS THE REPRESENTATION RESULTED IN AN ENFORCEABLE RIGHT TO RECEIVE THE FUNDS.);
- C. THE ACTUAL, OR ANNUALIZED AMOUNT OF FUNDS TO WHICH A GROUP OF INDIVIDUALS IS ENTITLED AS A RESULT OF REPRESENTATION BY THE PROGRAM, EVEN IF NOT EVERY INDIVIDUAL ENTITLED TO THE FUNDS WAS A CLIENT. THUS, IF AN ORDER OF GENERAL APPLICABILITY (WHICH MAY BE JUDICIAL, ADMINISTRATIVE OR LEGISLATIVE) RESULTS IN A GROUP OR CLASS OF LOW INCOME PERSONS BEING ENTITLED TO PAYMENT OF FUNDS, YOU SHOULD INDICATE THE ANNUAL VALUE OF ALL THOSE FUNDS TO ALL THE RECIPIENTS ENTITLED TO THEM. IF YOU DO NOT KNOW ACTUAL NUMBERS, PLEASE ESTIMATE AND EXPLAIN THE BASIS FOR THE ESTIMATE.

- **OBJECTIVES ACCOMPLISHED**

- THE KIND OF OBJECTIVES IN THE REPORT FORM ARE INCLUDED ONLY TO PROVIDE GENERAL GUIDANCE TO YOU. **PLEASE CHOOSE THE TYPE OF OBJECTIVE THAT MOST CONFORMS TO THE PROJECT THAT HAS BEEN FUNDED BY THE PUBLIC GRANT.** KEEP IN MIND THE OBJECTIVES OUTLINED IN YOUR FY 2008 SUBGRANT AGREEMENT. CHOOSE ALL THAT APPLY.
- OBJECTIVES REGARDING ACCESS: SUCH OBJECTIVES MAY RANGE FROM INCREASING THE NUMBER OF PERSONS FROM A PARTICULAR POPULATION OR GEOGRAPHIC AREA WHO ARE RECEIVING ASSISTANCE, TO STRENGTHENING THE SENSE OF COMMUNITY OF A TARGETTED NEIGHBORHOOD.
- OBJECTIVES REGARDING OUTCOMES: EXAMPLES OF OUTCOMES MIGHT BE TO STABILIZE THE LIVING SITUATION OF A CLIENT TO PREVENT HOMELESSNESS, AVOID RETURN TO INCARCERATION OR INSTITUTIONALIZATION FOR PERSONS WITH PSYCHIATRIC DISABILITIES OR UNTREATED MENTAL ILLNESSES
- OBJECTIVES REGARDING COLLABORATION/COOPERATION WITH OTHER SERVICE PROVIDERS: EXAMPLE MIGHT BE TO INCREASE COORDINATION OF SERVICES WITH OTHER AGENCIES SERVING IMMIGRANT POPULATIONS IN ORDER TO INCREASE THEIR EFFECTIVE PARTICIPATION IN SOCIETY AND THE ECONOMY.

COMPELLING STORIES

IN SELECTING THE STORIES, CHOOSE COMPELLING EXAMPLES OF HOW THE PROJECT FUNDED WITH DC PUBLIC GRANT MADE A DIFFERENCE IN FOR AN INDIVIDUAL CLIENT, A SEGMENT OF THE LOW INCOME COMMUNITY, OR THE CITY. IN ADDITION TO INFORMING INTERESTING PERSONS OF THE NUMBERS OF PERONS ASSISTED, WE WOULD LIKE TO BE ABLE TO PUT A HUMAN FACE ON THE WORK THAT YOU DO FOR FUNDERS.

DC BAR FOUNDATION

**QUARTERLY REPORT FORM
RECIPIENTS OF DC PUBLIC FUNDS
FY 2008**

GRANTEE INFORMATION	
Organization: _____	
Project Name: _____	Grant Amount _____ Period covered _____
Contact person regarding this report: _____	Tel. _____ E-Mail _____

SERVICES PROVIDED THROUGH THE PUBLIC FUNDING	
1. Number of persons served using DC public funds.	<input type="text"/>
2. Number of persons served in (1) who were DC residents. (Identify numbers by Ward)	<input type="text"/>
3. Number of persons served in (1) with limited or no proficiency in English	<input type="text"/>
4. Number of persons <i>not</i> receiving legal assistance and referred to other help	
a. Referral for social services or other form of non-legal assistance	<input type="text"/>

b. Other referrals (Please specify)	<input type="text"/>	
c. Total of 4(a) and (b)	<input type="text"/>	
5. Total number of <i>persons</i> whose case was accepted for legal assistance	<input type="text"/>	
6. Total number of <i>cases</i> accepted for legal assistance	<input type="text"/>	
7. Number of cases or other activities reported in Item 6 intended or likely to benefit large numbers of persons ("systemic work")	<input type="text"/>	
a. Briefly describe the case(s) or activity(ies)		
b. Potential number of persons who may benefit from each case.	<input type="text"/>	
8. Number of cases closed by categories from 8(a)(1) through (4) below	<input type="text"/>	
a. Type of assistance provided with the public funds NOTE: Please enter the highest level of service provided for each case.		
(1) Legal advice or counsel	<input type="text"/>	
(2) Brief service	<input type="text"/>	
(3) Extended representation	<input type="text"/>	
(4) Other assistance (Please describe) _____	<input type="text"/>	

9. Pro bono assistance		
a. Cases placed		<input style="width: 90%; height: 20px;" type="text"/>
b. Cases co-counseled		<input style="width: 90%; height: 20px;" type="text"/>
10. Number of individuals directly receiving legal information and self-help materials		<input style="width: 90%; height: 20px;" type="text"/>
11. Community legal education and training		
a. Have you conducted community legal education for low income persons to inform them of their rights and responsibilities or to provide guidance regarding how to resolve legal problems?		<input style="width: 90%; height: 20px;" type="text"/> Yes <input style="width: 90%; height: 20px;" type="text"/> No
<p>If yes, for each community legal education session conducted, indicate:</p> <p>(1) The subject area(s),</p> <p>(2) Where it was conducted, and</p> <p>(3) the number of persons who attended each session (estimate, if necessary)</p> <p>(Use additional sheets if necessary)</p>		
Subject matter	Where conducted	# attending

b. Have you provided training to other professional personnel, personnel of social service agencies or other organizations?

<input type="checkbox"/> Yes <input type="checkbox"/> No

If yes, for each training session conducted, indicate:

- (1) The subject area(s) covered,
- (2) The type of organization that received training, and
- (3) The number of persons who were trained (*estimate, if necessary*)
(Use additional sheets if necessary)

Subject matter	Organizations served	# attending

12. If you have obtained any of the following financial benefits for clients, please estimate the approximate annual value.

a. Public benefits, including disability and Medicare/Medicaid benefits	<input style="width: 90%; height: 40px;" type="text"/>
b. Child-support	<input style="width: 90%; height: 40px;" type="text"/>
c. Unemployment compensation	<input style="width: 90%; height: 40px;" type="text"/>
d. Damages or other recovery in consumer, landlord-tenant, or other matters	<input style="width: 90%; height: 40px;" type="text"/>
e. Other (Please describe)	<input style="width: 90%; height: 40px;" type="text"/>

OBJECTIVES ACCOMPLISHED	
Check all that apply	Type of objective
	<p>To increase awareness of legal rights and understanding of the legal system by low income persons and social service agency personnel.</p>
	<ul style="list-style-type: none"> • <i>State what you hope to accomplish including specifically the target population, if any, and the area of substantive focus.</i> • Describe the progress you have made accomplishing the intended objective. • What means have you used or do you propose to use to measure your accomplishment of the intended objectives? • Describe any impediments you have encountered to accomplishing the intended objectives, and your strategy for overcoming the impediments or adjusting the objectives, if necessary. •
	<p>To make representation available in locations or to populations that have not had ready access to legal assistance. (Includes projects such as opening new neighborhood offices and providing representation in court, and in jails.)</p>
	<ul style="list-style-type: none"> • <i>State your specific objective seeking to make representation available in areas or to persons without previous ready access.¹</i> • Describe the progress you have made accomplishing the intended objective. • What means have you used or do you propose to use to measure your accomplishment of the intended objectives? • Describe any impediments you have encountered to accomplishing the intended objectives, and your strategy for overcoming the impediments or adjusting the objectives, if necessary.

OBJECTIVES ACCOMPLISHED	
Check all that apply	Type of objective
	<p>To accomplish change in systems, practices and policies which adversely affect low-income persons and communities.</p>
	<ul style="list-style-type: none"> • <i>State what you hope to accomplish in the area of systemic change</i> • Describe the progress you have made accomplishing the intended objective. • What means have you used or do you propose to use to measure your accomplishment of the intended objectives? • Describe any impediments you have encountered to accomplishing the intended objectives, and your strategy for overcoming the impediments or adjusting the objectives, if necessary..
	<p>To accomplish a specific, intended outcome in the lives of persons who are represented.</p>
	<ul style="list-style-type: none"> • <i>State the specific intended outcome.</i> • Describe the progress you have made accomplishing the intended objective. • What means have you used or do you propose to use to measure your accomplishment of the intended objectives? • Describe any impediments you have encountered to accomplishing the intended objectives, and your strategy for overcoming the impediments or adjusting the objectives, if necessary.
	<p>To establish cooperative, collaborative relationships with other service providers.</p>
	<ul style="list-style-type: none"> • <i>State specifically the hoped-for outcome in establishing or improving the inter-agency relationship.</i> • Describe the progress you have made accomplishing the intended objective. • What means have you used or do you propose to use to measure your accomplishment of the intended objectives? • Describe any impediments you have encountered to accomplishing the intended objectives, and your strategy for overcoming the impediments or adjusting the objectives, if necessary.

OBJECTIVES ACCOMPLISHED	
Check all that apply	Type of objective
Other	
	<ul style="list-style-type: none"> • <i>State specifically the intended objective.</i> • Describe the progress you have made accomplishing the intended objective. • What means have you used or do you propose to use to measure your accomplishment of the intended objectives? • Describe any impediments you have encountered to accomplishing the intended objectives, and your strategy for overcoming the impediments or adjusting the objectives, if necessary.
<u>IMPORTANT RESULTS ACHIEVED BY THE PROJECT</u>	
<ul style="list-style-type: none"> • State the most important result accomplished to date by the project for the benefit of low income communities or individuals. 	
<ul style="list-style-type: none"> • Provide no more than two stories of how your work has benefited low income individuals or the low income community. 	

ⁱ Such objectives may range from *increasing* the number of persons from a given population or geographic area who are receiving assistance, to strengthening the sense of community of a targeted neighborhood.