

# Statewide Senior Legal Assistance Program



## **PROJECT 2025**

### **ENHANCED ACCESS TO LEGAL ASSISTANCE FOR OLDER AMERICANS IN VIRGINIA**

**GRANT PROPOSAL FROM THE COMMONWEALTH OF VIRGINIA  
LEAD AGENCY – THE VIRGINIA DEPARTMENT FOR THE AGING  
PARTNER ORGANIZATION – VIRGINIA POVERTY LAW CENTER**

*Model Approaches to Statewide Legal Assistance Systems*

*Funding Opportunity Number: HHS-2006-AoA-SL-0609*

*OMB Approval No. 0985-0018*



## **PROJECT 2025**

### ENHANCED ACCESS TO LEGAL ASSISTANCE FOR OLDER AMERICANS AOA-SL-0609

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## **I. PROJECT NARRATIVE**

### **1. SUMMARY ABSTRACT**

The applicant, the Virginia Department for the Aging (VDA), is the State agency that currently houses the Legal Services Developer. VDA, in partnership with the Virginia Poverty Law Center, Inc. seeks this three year Model System Development Grant in order to incorporate low-cost legal assistance mechanisms into a comprehensive statewide program. VDA has the support of Virginia's Governor, the Honorable Timothy Kaine, as well as the Secretary of Health and Human Resources, the Honorable Marilyn Tavenner. The **goal** of the project is two-fold. First, Virginia will strengthen its existing program by involving stakeholders in statewide planning and collaboration (year one). Second, Virginia, in conjunction with the stakeholders, will create statewide standards to define measurable units of legal assistance for individuals aged 60 years and older in greatest social and economic need (year two). The **objectives** are: 1) to enhance the relationship between AAAs and Legal Aid Programs; 2) to foster collaboration among the legal aid programs and between the public and private bar on behalf of seniors, as well as collaboration with a range of stakeholders; 3) to establish a system to reach specific target populations including rural, non-English speaking and those in long term care facilities; 4) to develop a statewide system to collect data and report performance results; 5) to firmly establish the role and benefits of the model program developed and obtain funding to continue the program after the grant period ends (year three). The expected **outcomes** of this project are: consistent and meaningful participation by stakeholders in Statewide planning and coordination of legal assistance services for those aged 60 years and over; and a successful model that can be duplicated in other States. The **products** from this project are: a final report, including evaluation results; articles for publication; data on stakeholder participation including survey results.



## 2. PROBLEM STATEMENT

### The Coming Tsunami: Aging in the Commonwealth of Virginia.

Project 2025 (Twenty – Twenty-Five) is Virginia’s attempt to address the projected increase of older Americans in Virginia needing legal assistance. By the year 2025, only nineteen years from now, Virginia’s population aged 60 years and older is expected to increase by 1,010,988 persons. This is nearly a 100% increase from year-2000 figures published by the U.S. Census Bureau.<sup>1</sup> These same figures indicate that the population aged 25 years to 59 years, will increase by only 438,050 persons, or 12% during this same time period! Plainly stated, Virginia’s Senior<sup>2</sup> population is expected to increase from 23% of the total population, approximately 1 out of every 4 Virginians, to 34% or 1 out of every 3 Virginians! Considering the current demand on essential state resources in Virginia and the finite legal assistance delivery mechanisms in place for Seniors, it is imperative that we prepare now to ensure that Seniors and their caregivers have adequate access to legal information and legal assistance when needed.

### Legal Needs of Older Virginians

A statewide legal needs assessment commissioned by the Legal Services Corporation of Virginia, with the support of the Virginia Bar Association and the Virginia Law Foundation was completed in early 2006. Preliminary analysis of the survey data reveals that 42.9% of low-income elderly households surveyed reported at least one legal problem during the last year. Over half of them did nothing to resolve their legal problem, with most reporting that this was because they were unable to get assistance or didn't know where to go to get assistance. Only

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<sup>1</sup> Reference Source: Virginia Employment Commission webpage citing revisions to U.S. Census population projections for the Commonwealth of Virginia. Figures for year-2020 projections and year-2030 projections were interpolated to analyze 2025 projections. [http://www.vec.virginia.gov/docs/xls/pop\\_projs.xls](http://www.vec.virginia.gov/docs/xls/pop_projs.xls).

<sup>2</sup> Throughout this proposal, the word “Senior” means individuals aged 60 years and older.



about 12% were able to get assistance from a legal aid organization or a private attorney.

Almost as many attempted to resolve their legal problems on their own.

Of those reporting a legal problem, nearly 9% reported having a health care related legal problem; 8.3% needing assistance with an advance directive; 6% having a guardianship related problem; and 1% reported elder abuse. The remaining 18% reported a variety of other types of legal problems.

According to the 2000 Census, there were some 71,545 Virginians over the age of 65 living in poverty, constituting about 9.5% of all Virginians over the age of 65. Applying the data from the recent legal needs assessment, this would suggest that there are some 30,693 low-income elderly Virginians experiencing legal problems each year. In the 2004-2005 fiscal year, Virginia legal aid programs assisted 4,493 clients age 60 or older. (This represented 14% of the total cases closed for all ages across the state by Virginia's legal aid programs.) Using this as a rough yardstick, this suggests an unmet legal need of at least 85%. Incidentally, this correlates closely with the results of legal needs studies from other states over the years.

#### Legal Resources In Virginia

While fragmented and unevenly distributed throughout the state, there are already many excellent legal resources in the Commonwealth to assist Seniors who are in need and unable to access and/or afford a private attorney. There are also State agencies, public and private advocacy groups and other stakeholders who offer legal information and important consumer protections for citizens, including Seniors, in Virginia. Specifically:

1. **State Legal Assistance Developer**; housed in the Virginia Department for the Aging in the Center for Elder Rights unit (lawyer with solid background in legal services).
2. **State Long-Term Care Ombudsman**; housed independently in the Virginia Association of Area Agencies on Aging (private non-profit), with local and regional programs throughout the state.



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3. **Virginia Poverty Law Center, Inc.**; a statewide advocacy organization that provides training and technical assistance to legal aid programs throughout the Commonwealth, with experience in pro bono and low-cost delivery mechanisms.
4. **Legal Aid Programs**; 10 Programs with 24 locations throughout the Commonwealth, 18 of which have Title III Older American Act funds according to a State survey completed last year of 25 AAAs.
5. **Legal Aid Hotlines**; Virginia has 10 programs, See [www.legalhotlines.org](http://www.legalhotlines.org) .
6. **Statewide Toll Free Number for Legal Aid Locator Service**; Includes pre-recorded legal information on a variety of topics in English, Spanish, and other languages.
7. **Virginia Elder Rights Coalition**; a statewide alliance of groups created in the late 1990s to enhance legal rights of older Virginians; hosts listserve and annual statewide elder rights conference.
8. **Virginia Office of the Attorney General/Triad Partnership**
9. **Legal Services Corporation of Virginia, Inc.**
10. **Virginia Counseling and Assistance Program (VICAP)**.
11. **VaLegalAid.org**; user-friendly online resource, includes section on elder law.
12. **Senior Navigator** – Virginia’s Resource for Health & Aging; a statewide user-friendly website that includes information on health, legal, long-term care, etc. information.
13. **2-1-1 Virginia**; free access to health and human services & legal information.
14. **National Academy of Elder Law Attorneys**; Virginia Chapter
15. **AARP**; Virginia Chapter
16. **The Alzheimer’s Association**; Virginia Chapter
17. **The Virginia Guardianship Association (VGA)**.
18. **Virginia State Bar**; Access to Legal Services/Pro Bono Office and Senior Lawyers Conference



**19. Virginia Bar Association; Elder Law Section<sup>3</sup>**

**20. Law Schools and Legal Clinics** (7 Law Schools throughout the Commonwealth).

**21. Other Stakeholders<sup>4</sup>**

Given these resources already available in the Commonwealth of Virginia, there is a great opportunity for our State to enhance our current delivery system through statewide coordination and collaboration among providers, advocacy groups and other stakeholders. Greater coordination will enable Virginia to develop a cost-effective statewide system to consistently collect data and report accurate and measurable results.

Deficiencies/Gaps in Current System and Attempts to Address

Historically, Virginia has lacked statewide coordination of legal assistance delivery mechanisms. The current system is fragmented and measurement reporting is sparse and lacks uniformity across the State. While coordinated efforts have been attempted over the years (*Empowering Older Virginians: An Elder Rights Blueprint*, Virginia Elder Rights Task Force 1996), some stakeholders have become weary of what appears to be an impossible task given available resources.

Gaps Identified By the Virginia Elder Rights Coalition

On September 16, 2005, the Virginia Elder Rights Coalition (VERC) identified four specific problems that adversely impact legal assistance delivery mechanisms for Virginia's Senior population. **First**, Seniors often need hands-on assistance navigating through telephone prompts or other delivery systems that do not permit them to speak with a "live" person. **Second**, Lack of transportation for the homebound and/or institutionalized can prevent Seniors

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<sup>3</sup> All further references to VBA or Virginia Bar Association are references to the Elder Law Section.

<sup>4</sup> Additional Stakeholders in Virginia that offer indirect legal assistance to Seniors: Virginia Board for People with Disabilities, Department Social Services/Adult Protective Services, Department for Veteran Affairs (Aid and Attendance Program), Department of Medical Assistance, Department of Mental Health, Mental Retardation, & Substance Abuse Services, Virginia Office for Protection and Advocacy, Department of Professional and Occupational Regulation, Federal Reserve Bank of Richmond, Department of Agriculture & Consumer Affairs,



from accessing legal assistance otherwise available to them. For example, transportation hurdles may thwart a Senior from getting a contract reviewed to evaluate a fraud or predatory lending problem or getting help with other matters requiring document review. **Third**, Uniform *Outcome Measurements* need to be consistently collected, analyzed and disseminated so that various groups are not expending valuable resources constantly *re-inventing the wheel* or reporting “apples” when another group is reporting “oranges.” Virginia needs one statewide standard to define measurable units of legal assistance for individuals aged 60 years and older. **Fourth**, Virginia lacks a *Statewide Vision* and consistent collaboration among legal assistance providers and advocacy groups for Seniors. While the Commonwealth of Virginia is indeed fortunate to have highly committed and talented individuals and organizations across the state, many efforts have been targeted regionally rather than Statewide, such that efforts are often fragmented. While there are pockets of very successful endeavors across the State, there are also underserved populations in rural areas and among specific Senior groups, such as the institutionalized, minorities and non-English speaking.

In mid-2005, VERC appointed a subcommittee to look at the delivery of legal services to the elderly in Virginia, to assess the service delivery problems, and to consider whether Virginia should seek funding from the Administration on Aging and other funding sources to enhance Virginia’s delivery of legal services to the elderly. VERC then developed a plan to work with the legal aids and the private bar to enhance the delivery of legal services to the elderly statewide, especially to the un- and under-served, and unanimously agreed to seek funding from the Administration on Aging, and others, in order to fund two full-time attorney positions in order to effectuate these goals.

Out of these meetings, VERC formulated four overall objectives:



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- (1) To strengthen, enhance and evaluate the performance of Title III legal services programs and to facilitate access for elderly clients by improving the service delivery system for elderly clients at legal aid programs throughout the state;
- (2) To increase the number of elderly clients served by working to recruit, train, and support the private bar in providing pro bono legal services to elder Virginians who, because of disability or socio-economic status, cannot otherwise retain the services of a private attorney;
- (3) To maximize the efficient use of limited resources by avoiding duplication, encouraging communication and collaboration among services providers; and
- (4) To enhance the provision of a full range of legal services to Senior Virginians, including a focused approach to serving the most vulnerable elder populations, particularly those residing in nursing homes, assisted living facilities and disabled elderly residing in the community.

In addition, VERC recognized that while Virginia has ten telephone legal helplines lodged in legal services programs, they lack uniformity, ready access by Seniors, and helpline staff require training in recognizing and referring common legal problems of Seniors. The helplines are uneven, with some staffed in person and others using automated messages. They lack quality assurance and efficiency measures of the hotlines supported under Title IV of the Older Americans Act. VERC sought to bolster the helplines and better integrate them into the larger system.

In order to accomplish these objectives, VERC decided to seek funding from various sources to fully fund two positions: a full time legal services developer at the Virginia Department for the Aging and a full time elder law attorney at the Virginia Poverty Law Center.

In early 2006, after meeting with several stakeholders, including the Executive Director of Legal Services Corporation of Virginia (LSCV), funding was obtained for a full time elder law



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attorney for Virginia Poverty Law Center, Inc. This was viewed as an extraordinary accomplishment directly resulting from VERC's collaborative efforts. The success of VERC's efforts has invigorated stakeholders while also beginning to address deficiencies and gaps in the current statewide system. The Commonwealth of Virginia seeks to build on this momentum by seeking grant funds from AoA under funding opportunity HHS-2006-AoA-SL-0609.

### **3. GOALS & OBJECTIVES**

To ensure success and a concentration of efforts, Virginia narrowed VERC's original goals to two and sought collaboration and support from the highest levels of Virginia Government. The Virginia Department for the Aging (VDA) is the agency submitting this grant application (because it houses the Legal Services Developer), but this project also has the support of Virginia's Governor, the Honorable Timothy M. Kaine, as well as the Secretary of Health and Human Resources, the Honorable Marilyn Tavenner. The **goal** of the project is two-fold.

**First**, Virginia will strengthen its existing program by involving stakeholders in statewide planning and collaboration (year one).

**Second**, Virginia, in conjunction with the aforementioned stakeholders, will create statewide standards to define measurable units of legal assistance for individuals aged 60 years and older (year two).

The first objective allows Virginia an opportunity to enhance the delivery of legal services to older Virginians; to maximize the efficient use of limited resources by avoiding duplication, encouraging communication and collaboration among service providers and other stakeholders. Objective-one prepares the foundation and framework for Objective-two. The second objective allows Virginia to develop effective and measurable means to facilitate access for clients to legal assistance by improving and standardizing the service delivery system for seniors at legal aids and AAAs throughout the Commonwealth.



Virginia will accomplish these goals through *Project 2025: Enhanced Access to Legal Assistance for Older Americans in Virginia*. The project has **five objectives**:

- 1) To enhance the relationship between AAAs and Legal Aid Programs;
- 2) To foster collaboration among legal aid programs, the Private Bar, the Virginia State Bar, the Virginia Bar Association, AARP, Virginia Law Schools, the Department of Social Services/APS, Long-Term Care Ombudsman and other stakeholders;
- 3) To establish a system to reach specific target populations including rural, non-English speaking and those in long term care facilities;
- 4) To develop a statewide system to collect data and report performance results;
- 5) To firmly establish the role and benefits of the model program developed and obtain funding to continue the program after the grant period ends (year three).

Virginia is committed to successfully executing these objectives to ensure enhanced access to legal assistance for older Americans in Virginia.

#### **4. PROPOSED INTERVENTION**

##### Overview

The Virginia Department for the Aging (VDA) is the State agency that currently houses the Legal Services Developer and will act as the lead agency for this project in partnership with the Virginia Poverty Law Center, Inc. (VPLC).<sup>5</sup> Goals, objectives and periodic evaluations will be phased in at annual intervals to prevent and avoid past mistakes (i.e. overloading stakeholders; endless meetings without seeming to accomplish anything, etc.). The project will also rely heavily upon the positive lessons learned (i.e. collaborative efforts, coordination and communication) in working with the Virginia Elder Rights Coalition (VERC). Rather than attempting to address *every* need and deficiency, the proposed intervention focuses on

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<sup>5</sup> Virginia Poverty Law Center, Inc. (VPLC) is a one-of-a-kind statewide advocacy organization that provides training and technical assistance to legal aid programs throughout the Commonwealth of Virginia, private bar



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strengthening Virginia's existing program by involving major stakeholders in statewide planning and collaboration in the first year of the grant period. **Major Stakeholders** include direct service providers and referral agencies such as the AAAs, legal aid programs, the Virginia State Bar, the Virginia Bar Association, AARP, The Alzheimer's Association, Virginia Law Schools, Virginia Department of Social Services/Adult Protective Services, Long-Term Care Ombudsman and other highly visible referral agencies working with older Americans in Virginia. Then, in the second year, and in collaboration with the major stakeholders, statewide standards will be created to define measurable units of legal assistance for individuals aged 60 years and older. Last, in the third year of the grant period, additional stakeholders will be invited and encouraged to participate in Project 2025.

#### Proposed Intervention

##### **4-A. Enhance Collaboration Among AAAs & Legal Services**

- Strengthen awareness of AAAs of legal problems faced by elders, legal solutions, identification & referral of legal issues -- through quarterly newsletters and participation in yearly meeting at the Annual Statewide Virginia Legal Aid Conference.
- Foster structured discussions between AAAs and legal service providers yearly during roundtable discussion session at the Annual Statewide Virginia Legal Aid Conference.

##### **4-B. Improve Visibility and Capacity of Legal Services Programs & Helplines<sup>6</sup> to Serve**

###### **Seniors**

- Develop distribution list that includes all stakeholders. Send stakeholders periodic announcements and other information on Project 2025.

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attorneys willing to offer *pro bono* services, and low-income clients. VPLC's staff now includes a full-time Elder Law Attorney.

<sup>6</sup> Virginia has 10 programs as listed on the [www.legalhotlines.org](http://www.legalhotlines.org) directory.



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- As part of Annual Statewide Legal Aid Conference, include a roundtable discussion on ways to improve and bolster the current ten hotlines in Virginia. Seek technical assistance on ways to obtain uniformity, ready access by Seniors, and train helpline staff to recognize common legal problems of Seniors (year one).
- Using the results from the roundtable discussion above, provide training in elder law to helpline staff and volunteers at the next Annual Statewide Legal Aid Conference; promoting meetings of helpline staff and volunteers with AAAs, enhance referrals, publicize helplines on Senior Navigator and other low/or no-cost public forums geared to the Senior population. Invite all stakeholders. (year two).
- VPLC will provide technical assistance to legal aid paralegals and attorneys around state with elder law cases and issues, and provide training in elder law issues by conducting training sessions in conjunction with quarterly Elder Law Task Force meetings (See below).
- Establish Elder Law Task Force of Title III lawyers and paralegals and ombudsman to meet quarterly to discuss cases & address common concerns, educate participants about services and selected legal issues.
- Identify elder law specialist in each legal services program to serve as contact and point person. Publicize to all stakeholders.
- Develop, implement & maintain statewide Elder Law *Listserve* to address specific problem areas and questions. Listserve open to legal service advocates, long-term care ombudsmen, others as appropriate.
- Publicize helplines, legal services, and other legal assistance mechanisms on Senior Navigator and other stakeholder web pages (i.e. “links” page) as appropriate. Relay this information to all stakeholders. Bolster Senior Navigator’s and VaLegalAid’s self-help centers/web pages with information on legal services/legal issues.

**4-C. Foster Private Bar Initiatives & Collaboration**



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- Work with Virginia State Bar Senior Lawyers Conference (SLC) to recruit senior lawyers for pro bono, low fee panels, and helplines. Make use of Virginia's new Emeritus rule; and SLC long-standing interest in elder law.
- Join with the Virginia State Bar (VSB), Virginia Bar Association (VBA) and the Virginia Chapter of the National Association of Elder Law Attorneys (NAELA) to recruit and train attorneys to accept pro bono cases through legal services/helplines. Use this as an opportunity to engage other stakeholders in Project 2025.
- Use Annual Statewide Legal Aid Conference to train & recruit private attorneys who agree to take pro bono cases in exchange for free CLE, including ethics credit. Use this as an opportunity to engage other stakeholders in Project 2025.
- Education events. Encourage involvement of legal aid attorneys & paralegals in local elder law bar groups. Use this an opportunity to engage other stakeholders in Project 2025.
- Draw in other bars (Old Dominion Bar Association, Women's Bar)
- Seek assistance from ABA Commission on Law and Aging on this component.

**4-D. Establish A System to Reach Specific Target Populations, Including Rural, Non-English Speaking and Those in Long-Term Care Facilities**

- Virginia Poverty Law Center (VPLC) now has a full-time elder law attorney who will devote 25% of her time to handling cases for full representation in the following areas: nursing home transfer/discharge, resident's rights issues, quality of care problems, long term care Medicaid eligibility issues, Olmstead-related cases, and fair housing issues involving the elderly.
- VPLC and State Long-Term Care Ombudsman will collaborate on a series of Audio Teleconferences on long-term care issues, which will be readily accessible by telephone for rural, community based caregivers, and residents and families of long-term care facilities.



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- VDA and VPLC will collaborate on a series of audio conferences on other elder law issues (see above).
- VDA will produce pamphlets on elder law issues which will be translated into Spanish and other languages and distributed where there is a high incidence of non-English speaking Seniors.

**4-E. Develop Statewide System to Collect Data and Report Performance Results**

- In conjunction with AoA, conduct assessment of current legal needs of older Virginians. Seek assistance from TCSG.
- In conjunction with AoA and Stakeholders, develop statewide system to collect data and report performance results. Include legal services, helplines and private bar mechanisms in data collection effort. Come up with uniform units/elements for measurement; pioneer this method for other states.

**Suggested Format Example From Lessons Learned<sup>7</sup>:**

**Sample Virginia Legal Assistance Quarterly Reporting Format**

<b>Legal Service</b>	<b>Consumer</b>	<b>Estate Planning</b>	<b>Family</b>	<b>Health</b>	<b>Housing</b>	<b>Public Benefits</b>	<b>LTC</b>	<b>Other</b>
Service								
Extended Service								
Legal Advice								
Legal Representation								
Community Education								

- “Service” means general legal information/assistance service lasting less than one hour from a lay advocate. Service also includes access to on-line information (a “hit”). Each hit equals one service unit.

<sup>7</sup> Rather than trying to collect everything, develop a user-friendly measurement and data collection system that stakeholders will not view as intrusive or hostile. Start out very simple, get stakeholders “sold” and then grow the



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- “Extended Service” means legal information/assistance service lasting an hour or more from a lay advocate.
- “Legal Advice” means legal advice provided by or under the direction of an attorney licensed in Virginia or operating under the Virginia State Bar’s Emeritus Rule. Legal Advice includes hotline calls if provided by or under the direction of an attorney as described above.
- “Legal Representation” means a case was initiated in an administrative body before a hearing officer or in State or Federal Court and a licensed attorney is listed with the Court as attorney of record (also includes ombudsman and paralegals representing clients in administrative hearings). If an action is subsequently withdrawn or dismissed, it still counts as one legal representation unit of service. If a case is subsequently appealed, filing in the appellate court, etc. counts as a second legal representation unit and so on.
- “Community Education” means presentations to community organizations, stakeholders or other groups where there are five or more persons present. If there are 100 or more persons present, then this counts as two Community Education Service units. If there are 150 or more persons, then this counts as three service units and so on. Presentations may either by “live”, by conference call, by video or any other medium except “hits” on web pages.

**4-F. To Firmly Establish the Role and Benefits of the Model Program Developed Under this Grant and Obtain Funding to Continue the Program After the Grant Period Ends**

Convene Virginia Elder Rights Coalition (VERC) legal services committee, along with Legal Services Corporation of Virginia (LSCV) Executive Director and other stakeholders

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program over the course of several years. In this way, we will have accurate and uniform measurements for Virginia and a workable system that can be duplicated in other states.



knowledgeable about possible resources to identify funding strategies to continue the systematic change initiated by the project.

## **5. SPECIAL TARGET POPULATIONS AND ORGANIZATIONS**

As identified above at Intervention number 4D, there will be a particular focus to respond to the most compelling unmet legal needs of the most vulnerable elder population—i.e., those living in rural areas, nursing homes, assisted living facilities and those disabled elderly living in the community as well as non-English speaking. Seniors in nursing homes and assisted living facilities are particularly vulnerable, often lacking in the ability to advocate for themselves, because they often present cases which are complex and unfamiliar to many practitioners (i.e., nursing home discharge, residents' rights and quality of care issues, long term care Medicaid eligibility problems, Olmstead issues, community based care waiver issues, and fair housing issues). Because the cases are unfamiliar and complex, many private attorneys are not interested in handling them, and many legal aids do not handle them because of lack of staff with expertise. To address these issues, the elder law attorney at VPLC would devote a portion of her time to handling these cases in collaboration with a legal aid advocate or long-term care ombudsman where the client resides.

## **6. OUTCOMES<sup>8</sup>**

### **Outcome 1**

Intervention – Enhance Collaboration Between AAAs and Legal Services

Outcome – Seniors will have access to more comprehensive services and experience less frustration in obtaining legal assistance, whether directly from an AAA, from a Legal Aid Program, or a combination of both.

### **Outcome 2**



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Intervention – Improve Visibility of Legal Services Programs & Helplines to Serve Seniors

Outcome – Seniors in Virginia will have a greater understanding of legal assistance available to them and how to access these services.

### **Outcome 3**

Intervention – Foster Private Bar Initiatives & Collaboration

Outcome – Seniors will have greater access to *pro bono* legal services from private attorneys referred by AAAs or a Legal Aid Program .

### **Outcome 4**

Intervention – Establish a System to Reach Specific Target Populations, Including Rural, Non-English Speaking and Those in Long-Term Care Facilities.

Outcome – Non-English speaking Seniors as well as those in rural areas and long-term care facilities will have greater access to and understanding of legal assistance available to them and how to access these services.

### **Outcome 5**

Intervention – Develop Statewide System to Collect Data and Report Performance Results.

Outcome – More Seniors in Virginia will receive quality legal assistance as evidenced by empirical data.

## **7. PROJECT MANAGEMENT**

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<sup>8</sup> Also reference Attachment D: Project Work Plan (From page 14 of AoA Application & Submission informational sheet).



The Virginia Department for the Aging (VDA) is the State agency that currently houses the Legal Services Developer and will act as the lead agency for this project in partnership with the Virginia Poverty Law Center, Inc. (VPLC).<sup>9</sup>

### **Virginia Department for the Aging –**

#### **The Role of the AoA Mandated Position of State Legal Services Developer**

The primary responsibilities of the legal services developer will be to work with the AAA's and the Title III legal services projects to strengthen these programs; to work with the private bar to recruit and train attorneys willing to handle pro bono cases for elderly clients through their local legal aid programs; to work with the Bar in putting on community education events; to develop educational materials in the form of pamphlets and to develop an elder law website through the legal aid website; to participate in the Elder Law Task Force; to work with VPLC to develop the use of mediation services. Important Note: VDA will not engage in any activity considered to be the practice of law or construed as such. VDA's primary responsibility will include direct administration of the 2025 project. The Legal Services Developer will act as the lead person for ensuring the integration of various legal services delivery systems – including low-cost mechanisms – into an overall state legal services system for the Commonwealth of Virginia.

#### **Virginia Poverty Law Center As Facilitator and Legal Resource<sup>10</sup>**

(Including Training, Advocacy and Legal Representation on Complex Cases as Co-Counsel)

VPLC is a statewide program located in Richmond and provides civil legal assistance and advocacy, as well as training, technical assistance, coordination, and other support services to

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<sup>9</sup> Virginia Poverty Law Center, Inc. (VPLC) is a one-of-a-kind statewide advocacy organization that provides technical assistance and training to legal aid programs throughout the Commonwealth of Virginia, private bar attorneys willing to offer *pro bono* services, and low-income clients. VPLC's staff now includes a full-time Elder Law Attorney.

<sup>10</sup> VPLC is funded in part by Legal Services Corporation of Virginia (LSCV) and is an entity experienced in providing legal services to older persons within the Commonwealth of Virginia. VPLC is uniquely qualified as partner because it serves and coordinates with all LSCV grantees, which include LSC and non-LSC funded legal aid programs in Virginia. VPLC is experienced in low-cost service delivery mechanisms such as Title III B programs and Senior Legal Helplines and other similar programs.



the staff and clients of the 10 Virginia Legal Aid field programs. The primary responsibilities of the elder law attorney at VPLC is the provision of technical assistance and training in elder law to legal aid advocates, long term care ombudsman and other elder law service providers around the state; the establishment and maintenance of the Elder Law Task Force and the elder law listserv; handling long term care and community based care impact cases in collaboration with local legal aid advocates and/or long term care ombudsmen; working in collaboration with other advocates on legislative and administrative solutions to systemic problems in the elder law and long term care arena; working with the legal services developer to develop the use of mediation services for the elderly.

## **8. EVALUATION**

Virginia will collaborate with AoA and will seek technical assistance in the formation of appropriate and meaningful evaluation methods and tools. This format is necessary because Virginia, historically, has achieved only minimal success in formulating a statewide plan for legal assistance for Seniors. Consequently, evaluation tools have been non-existent on a statewide basis. The Cooperative Agreement aspect of this particular grant will afford AoA an opportunity to be substantially involved in the development and execution of the activities, including the evaluation and development of measurement tools for this project.

**Outcome-One Intervention** – Enhance Collaboration Between AAAs and Legal Services

**Measurement Tool** – At the conclusion of the **first year** of Project 2025, a survey will be distributed to all persons aged 60 years and over who have received legal assistance on at least two occasions during the preceding two years (From either an AAA, a legal aid office or a combination of both). Results will be analyzed to determine whether or not Seniors experienced easier access to legal assistance.

**Outcome-Two Intervention** – Improve Visibility of Legal Services Programs & Helplines to Serve Seniors



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**Measurement Tool** – At the conclusion of the **second year** of Project 2025, a survey will be distributed to Major Stakeholders<sup>11</sup> to determine whether or not their customer base, of clients aged 60 years and over, experienced less difficulty in receiving assistance/resolution to a legal issue as compared to prior years. Additionally, at the conclusion of the **third year**, statistics will be analyzed to determine whether the number of calls to helplines has increased as compared to the second year of the project.

**Outcome-Three Intervention** – Foster Private Bar Initiatives & Collaboration

**Measurement Tool** – At the conclusion of the **third year** of Project 2025, statistics will be analyzed to determine whether the number of private pro bono volunteers has increased as compared to the first year of the project.

**Outcome-Four Intervention** – Establish a System to Reach Specific Target Populations, Including Rural, Non-English Speaking and Those in Long-Term Care Facilities.

**Measurement Tool** – At the conclusion of the **third year** of Project 2025, a survey will be distributed to Stakeholders who work primarily with non-English speaking Seniors and/or those living in rural areas or in long-term care facilities to determine whether or not this population was more knowledgeable of the types of legal assistance available to them as a result of Project 2025.

**Outcome-Five Intervention** – Develop Statewide System to Collect Data and Report Performance Results.

**Measurement Tool** – At the conclusion of the **third year** of Project 2025, Virginia will have a statewide system, including a uniform statewide measurement tool that can be replicated in other states.

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<sup>11</sup> Major Stakeholders include direct service providers and referral agencies such as AAAs, Legal Aid, the Private Bar, Virginia Bar Associations, AARP, The Alzheimer’s Association, National Legal Resource Centers, Virginia Law Schools, Adult Protective Services, Long-Term Care Ombudsman and other highly visible referral agencies working with older Americans in Virginia.



## **9. DISSEMINATION**

Activities of Project 2025 will be widely disseminated throughout the Commonwealth through an email distribution list to all stakeholders (reference list of stakeholders on pages 4-6). In addition to publicizing upcoming events and meeting dates, stakeholders will be encouraged to include information on Project 2025 on their respective web sites and service entry points. There will also be a quarterly report and/or newsletter widely distributed (electronic and first class mail to those not having access to email) beginning in the second year of Project 2025. AoA will be included in all distributions to the general public. Finally, the **products** from Project 2025 (a final report, including evaluation results; articles for publication; data on stakeholder participation including survey results) will be distributed to AoA, the Governor of the Commonwealth of Virginia, the General Assembly of Virginia and all State Agencies as well as stakeholders and clients.

## **10. ORGANIZATIONAL CAPABILITY STATEMENT & KEY PERSONNEL**

Please reference attachments for organizational charts as follows:

- The Commonwealth of Virginia
- The Secretariat of Health and Human Resources
- Virginia Poverty Law Center, Inc (VPLC)

Please reference attachments for vitae/resumes on key personnel as follows:

- State Legal Services Developer (Janet Brown, Esq.)
- VPLC Elder Law Attorney (Kathy Pryor, Esq.)
- Position Description for Assistant to State Legal Services Developer
- Additional VDA Support (William Peterson, MSW, PhD)



## **II. WORK PLAN & COOPERATIVE AGREEMENT WITH AOA**

The Cooperative Agreement aspect of this particular grant will afford AoA an opportunity to be substantially involved in the development and execution of the activities, including modifications that may become necessary as Project 2025 progresses. Keeping this aspect of Project 2025 in mind, our work plan is as follows:

### **A. Enhance Collaboration between AAAs & Legal Services**

- Strengthen awareness of AAAs of legal problems faced by elders, legal solutions, identification & referral of legal issues -- through quarterly newsletters and yearly meeting at the Annual Statewide Virginia Legal Aid Conference.
- Foster structured discussions between AAAs and legal services providers yearly during roundtable discussion session at the Annual Statewide Virginia Legal Aid Conference.

**BY YEAR ONE-3<sup>rd</sup> Quarter:** LSD will educate AAA's about the use of legal aid services and about the legal problems elderly clients may face so that they can better identify problems and make appropriate and timely referrals, and work with both AAA's and legal aids toward better collaboration between the two.

**BY YEAR TWO-1<sup>st</sup> Quarter:** The Legal Services Developer (LSD) at VDA will develop a model reporting form for AAA's and legal services for the provision of Title III legal services; train the AAA's and legal aids on the use of these model forms, and encourage the use of the model reporting forms by the individual programs.

**BY YEAR THREE-2<sup>nd</sup> Quarter:** LSD will develop and implement standardized data and evaluation methodologies, including outcome and performance measures, for the Title III legal services providers to use for the reporting of Title III clients and outcomes.



**B. Improve Visibility and Capacity of Legal Services Programs & Helplines<sup>12</sup> to Serve**

**Seniors**

**BY YEAR ONE-1st Quarter:** Develop distribution list that includes all stakeholders. **LSD**

**BY YEAR ONE-3<sup>rd</sup> Quarter:** Send stakeholders quarterly updates on Project 2025. **LSD**

**BY YEAR ONE-4<sup>th</sup> Quarter:** As part of Annual Statewide Legal Aid Conference, include a roundtable discussion on ways to improve and bolster the current ten hotlines in Virginia. Seek technical assistance on ways to obtain uniformity, ready access by Seniors, and train helpline staff to recognize common legal problems of Seniors (year one). **VPLC and LSD**

**BY YEAR TWO-4<sup>th</sup> Quarter:** Train helpline staff and volunteers at the next Annual Statewide Legal Aid Conference; promoting meetings of helpline staff and volunteers with AAAs, enhance referrals, publicize helplines on Senior Navigator and other low/or no-cost public forums geared to the Senior population (year two). **VPLC** (Legal Training) and **VDA** (Administrative & Logistical Support).

**BY YEAR ONE-2<sup>nd</sup> Quarter:** VPLC will provide technical assistance to legal aid paralegals and attorneys around state with elder law cases and issues, and provide training in elder law issues by conducting training sessions in conjunction with quarterly Elder Law Task Force meetings (See below). The Task Force will identify statewide elder law issues that may need legislative or administrative solutions and will work together to address such solutions in a coordinated manner. The Elder Law attorney at VPLC and the State Long-Term Care Ombudsman will build and expand upon current collaborative work to strengthen elder rights protections for long-term

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<sup>12</sup> Virginia has 10 programs as listed on the [www.legalhotlines.org](http://www.legalhotlines.org) directory.



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care recipients through systems advocacy.<sup>13</sup> **VPLC** (Legal Training) and **VDA** (Administrative & Logistical Support).

**BY YEAR ONE-2<sup>nd</sup> Quarter:** Establish Elder Law Task Force of TIII lawyers and paralegals and ombudsman to meet quarterly to discuss cases & address common concerns, educate participants about services and selected legal issues. **VPLC**

**BY YEAR ONE-2<sup>nd</sup> Quarter:** Identify elder law specialist in each legal services program to serve as contact and point person. Publicize to all stakeholders. **VPLC** with administrative support by **VDA**.

**BY YEAR TWO-4<sup>th</sup> Quarter:** Provide training in elder law to helpline staff and volunteers at the Annual Statewide Legal Aid Conference. Invite all stakeholders. **VPLC** (Legal Training) and **VDA** (Administrative & Logistical Support).

**BY YEAR ONE-2<sup>nd</sup> Quarter:** Develop, implement & maintain statewide Elder Law *Listserve* to address specific problem areas and questions. Listserve open to legal service advocates, long-term care ombudsmen, others as appropriate. **VPLC** (Legal Training/Monitoring) and **VDA** (Administrative & Logistical Support only).

**BY YEAR ONE-2<sup>nd</sup> Quarter:** Publicize helplines, legal services, and other legal assistance mechanisms on Senior Navigator and other stakeholder web pages (i.e. “links” page) as appropriate. Relay this information to all stakeholders. Bolster *SeniorNavigator’s* and *VaLegalAid’s* self-help centers/web pages with information on legal services/legal issues. **VDA**

### **C. Foster Private Bar Initiatives & Collaboration**

<sup>13</sup> The Elder Law Attorney at VPLC and the Stte Long-Term Care Ombudsman in Virginia are optimally posiiotned (in state level not-for-profit agencies) to work collaboratively on state laws, regulations, and policies that can enhance elder rights protections. Utilizing a systematic advocacy approach furthers the efficient use of limited resources to effect change for maximum benefit for some of the most vulnerable elders.



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**BY YEAR ONE-2<sup>nd</sup> Quarter:** Work with Virginia State Bar Senior Lawyers Conference (SLC) to recruit senior lawyers for pro bono, low fee panels, and helplines. Make use of Virginia's new Emeritus rule; and SLC long-standing interest in elder law. **VPLC** (Legal Training) and **VDA** (Administrative & Logistical Support).

**BY YEAR ONE-4<sup>th</sup> Quarter:** Join with the Virginia State Bar (VSB), Virginia Bar Association (VBA) and the Virginia Chapter of the National Association of Elder Law Attorneys (NAELA) to recruit and train attorneys to accept low-income cases through legal services/helplines. Use this as an opportunity to engage other stakeholders in Project 2025. **VPLC** (Legal Training/Monitoring) and **VDA** (Administrative & Logistical Support only).

**BY YEAR TWO-4<sup>th</sup> Quarter:** Use Annual Statewide Legal Aid Conference to train & recruit private attorneys who agree to take pro bono cases in exchange for free CLE, including ethics credit. Use this as an opportunity to engage other stakeholders in Project 2025. **VPLC** (Legal Training/Monitoring) and **VDA** (Administrative & Logistical Support only).

**BY YEAR ONE-4<sup>th</sup> Quarter:** Education events. Encourage involvement of legal aid attorneys & paralegals in local elder law bar groups. Use this an opportunity to engage other stakeholders in Project 2025 and statewide planning initiatives to incorporate low-cost legal assistance mechanism into statewide legal service delivery systems. **VPLC** (Legal Training/Monitoring) and **VDA** (Administrative & Logistical Support only).

**D. Establish A System to Reach Specific Target Populations, Including Rural, Non-English Speaking and Those in Long-Term Care Facilities**

**BY YEAR ONE-1<sup>st</sup> Quarter:** The full-time Elder law attorney at the Virginia Poverty Law Center, Inc. will devote 25% of her time to handling cases for full representation in the following areas: nursing home transfer/discharge, resident's rights issues, quality of care problems, long term



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care Medicaid eligibility issues, Olmstead-related cases, and fair housing issues involving the elderly. **VPLC**

**BY YEAR ONE-1<sup>st</sup> Quarter:** Hire a full-time assistant to State Legal Services developer who will devote 100% of his/her time to assisting the legal services developer in the execution and monitoring of this grant and provide logistical staff support and assistance in outreach activities to non-English Speaking Seniors and those in rural areas or long-term care facilities. **VDA**

**BY YEAR TWO-1<sup>st</sup> Quarter:** VPLC and State Long-Term Care Ombudsman will collaborate on a series of Audio Teleconferences on long-term care issues, which will be readily accessible by telephone for rural, community based caregivers, and residents and families of long-term care facilities. **VPLC**

**BY YEAR TWO-1<sup>st</sup> Quarter:** VDA and VPLC will collaborate on a series of audio conferences on other elder law issues, which will be readily accessible by telephone for rural, community based caregivers, and residents and families of long-term care facilities. **VPLC** (Legal Training/Monitoring) and **VDA** (Administrative & Logistical Support only).

**BY YEAR THREE-2<sup>nd</sup> Quarter:** VDA will produce pamphlets on general elder law issues that will be translated into Spanish and other languages where there is a high incidence of non-English speaking Seniors. **VDA**

**BY YEAR TWO-2<sup>nd</sup> Quarter:** Elderly clients residing in more remote rural areas will be served through the recruitment of more private attorneys to provide legal services to elderly clients through the local legal aid office.

**E. Develop Statewide System to Collect Data and Report Performance Results**

**BY YEAR ONE-4<sup>th</sup> Quarter:** In conjunction with AoA, conduct assessment of current legal needs of older Virginians. Seek assistance from TCSG. **VDA with VPLC**



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**BY YEAR THREE-4<sup>th</sup> Quarter:** report performance results. Include legal services, helplines and private bar mechanisms in data collection effort. Come up with uniform units/elements for measurement; pioneer this method for other states. **VDA with VPLC**

**F. To Firmly Establish the Role and Benefits of the Model Program Developed Under this Grant and Obtain Funding to Continue the Program After the Grant Period Ends**

**BY YEAR THREE-1<sup>st</sup> Quarter:** Convene Virginia Elder Rights Coalition (VERC) legal services committee, along with Legal Services Corporation of Virginia (LSCV) Executive Director and other stakeholders knowledgeable about possible resources to identify funding strategies to continue the systematic change initiated by the project. **VDA in collaboration with VPLC and Stakeholders.**



### **III. LETTERS OF COMMITMENT AND SUPPORT**

- *SEE ATTACHMENTS* -

#### **LETTERS OF SUPPORT - GOVERNMENT**

- GOVERNOR OF THE COMMONWEALTH OF VIRGINIA
- VIRGINIA SECRETARY OF HEALTH AND HUMAN RESOURCES
- VIRGINIA OFFICE OF THE ATTORNEY GENERAL

#### **LETTERS OF COMMITMENT**

- VIRGINIA POVERTY LAW CENTER, INC. (VPLC)
- LEGAL SERVICES CORPORATION OF VIRGINIA (LSCV)
- OFFICE OF THE STATE LONG-TERM CARE OMBUDSMAN
- VIRGINIA STATE BAR
- VIRGINIA BAR ASSOCIATION

#### **LETTERS OF SUPPORT - STAKEHOLDERS**

- AMERICAN BAR ASSOCIATION (ABA)
- COMMONWEALTH COUNCIL ON AGING (CCA)
- HOUSING OPPORTUNITIES MADE EQUAL (H.O.M.E.)
- SENIORNAVIGATOR
- VIRGINIA ASSOCIATION OF AREA AGENCIES ON AGING (V4A)
- VIRGINIA ELDER RIGHTS COALITION (VERC)
- VIRGINIA GUARDIANSHIP ASSOCIATION (VGA)



## **ATTACHMENTS**

### **Attachment A:**

SF 424,  
SF 424Abudget  
Budget Narrative  
Other Required Forms

### **Attachment B:**

Budget Justification

### **Attachment C:**

Organizational Charts  
Vitae/Resumes for Key Personnel

### **Attachment D:**

Project Work Plan Forms

### **Attachment E:**

Letters of Commitment  
Letters of Support

### **Attachment F:**

Survey on Ensuring Equal Opportunity for Applicants  
N/A for State Government



## Attachment A

### **SF 424, Budget (SF 424A), Budget Narrative, and Other Required Forms**

- a. Standard Form 424
- b. Standard Form 424A
- c. Standard Form 424B - Assurances
- d. Certification Regarding Lobbying
- e. Other Application Components



**Attachment C:**  
Organizational Charts  
Vitae/Resumes for Key Personnel



**Attachment D: Project Work Plan, Page 1**

**Goal:** is two-fold. **First**, Virginia will strengthen its existing program by involving stakeholders in statewide planning and collaboration. **Second**, Virginia, in conjunction with the aforementioned stakeholders, will create statewide standards to define measurable units of legal assistance for individuals.

**Measurable Outcome(s):**

**Outcome-1** – Seniors will have access to more comprehensive services and experience less frustration in obtaining legal assistance, whether directly from an AAA, from a Legal Aid Program, or a combination of both.

**Outcome-2** – Seniors in Virginia will have a greater understanding of legal assistance available to them and how to access these services.

**Outcome-3** – Seniors will have greater access to *pro bono* legal services from private attorneys referred by AAAs or a Legal Aid Program .

**Outcome-4** – Non-English speaking Seniors as well as those in rural areas and long-term care facilities will have greater access to and understanding of legal assistance available to them and how to access these services.

**Outcome-5** – More Seniors in Virginia will receive quality legal assistance as evidenced by empirical data.

Major Objectives	Key Tasks	Lead Person	Timeframe (Start and End Date by Month)													
1. To enhance the relationship between AAAs and Legal Aid Programs.	<b>BY YEAR ONE-3<sup>rd</sup> Quarter:</b> LSD will educate AAA's about the use of legal aid services and about the legal problems elderly clients may face so that they can better identify problems and make appropriate and timely referrals, and work with both AAA's and legal aids toward better collaboration between the two.	LSD	S									E				
	<b>BY YEAR TWO-1<sup>st</sup> Quarter:</b> The Legal Services Developer (LSD) at VDA will develop a model reporting form for AAA's and legal services for the provision of Title III legal services; train the AAA's and legal aids on the use of these model forms, and encourage the use of the model reporting forms by the individual programs.	LSD	S		E											
	<b>BY YEAR THREE-2<sup>nd</sup> Quarter:</b> LSD will develop and implement standardized data and evaluation methodologies, including outcome and performance measures, for the Title III legal services providers to use for the reporting of Title III clients and outcomes.	LSD	S								E					



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<p>2.          Improve Visibility and Capacity of Legal Services Programs &amp; Helplines to Serve Seniors</p>	<p><b>BY YEAR ONE-1st Quarter:</b> Develop distribution list that includes all stakeholders. <b>LSD</b></p>	<p><b>LSD</b></p>	<p>S</p>		<p>E</p>									
	<p><b>BY YEAR ONE-2<sup>nd</sup> Quarter:</b> VPLC will provide technical assistance to legal aid paralegals and attorneys around state with elder law cases and issues, and provide training in elder law issues by conducting training sessions in conjunction with quarterly Elder Law Task Force meetings (See below). The Task Force will identify statewide elder law issues that may need legislative or administrative solutions and will work together to address such solutions in a coordinated manner. The Elder Law attorney at VPLC and the State Long-Term Care Ombudsman will build and expand upon current collaborative work to strengthen elder rights protections for long-term care recipients through systems advocacy. <b>VPLC</b> (Legal Training) and <b>VDA</b> (Administrative &amp; Logistical Support).</p>	<p><b>VPLC          VDA</b></p>	<p>S</p>					<p>E</p>						
	<p><b>BY YEAR ONE-2<sup>nd</sup> Quarter:</b> Establish Elder Law Task Force of TIII lawyers and paralegals and ombudsman to meet quarterly to discuss cases &amp; address common concerns, educate participants about services and selected legal issues. <b>VPLC</b></p>	<p><b>VPLC</b></p>	<p>S</p>					<p>E</p>						
	<p><b>BY YEAR ONE-2<sup>nd</sup> Quarter:</b> Identify elder law specialist in each legal services program to serve as contact and point person. Publicize to all stakeholders. <b>VPLC</b> with administrative support by <b>VDA</b>.</p>	<p><b>VPLC          VDA</b></p>	<p>S</p>					<p>E</p>						



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	<b>BY YEAR ONE-2<sup>nd</sup> Quarter:</b> Develop, implement & maintain statewide Elder Law <i>Listserve</i> to address specific problem areas and questions. Listserve open to legal service advocates, long-term care ombudsmen, others as appropriate. <b>VPLC</b> (Legal Training/Monitoring) and <b>VDA</b> (Administrative & Logistical Support only).	<b>VPLC VDA</b>	S							E				
	<b>BY YEAR ONE-2<sup>nd</sup> Quarter:</b> Publicize helplines, legal services, and other legal assistance mechanisms on Senior Navigator and other stakeholder web pages (i.e. "links" page) as appropriate. Relay this information to all stakeholders. Bolster <i>SeniorNavigator's</i> and <i>VaLegalAid's</i> self-help centers/web pages with information on legal services/legal issues. <b>VDA</b>	<b>LSD</b>	S							E				
	<b>BY YEAR ONE-3<sup>rd</sup> Quarter:</b> Send stakeholders quarterly updates on Project 2025. <b>LSD</b>	<b>LSD</b>	S								E			
	<b>BY YEAR ONE-4<sup>th</sup> Quarter:</b> As part of Annual Statewide Legal Aid Conference, include a roundtable discussion on ways to improve and bolster the current ten hotlines in Virginia. Seek technical assistance on ways to obtain uniformity, ready access by Seniors, and train helpline staff to recognize common legal problems of Seniors (year one). <b>VPLC and LSD</b>	<b>VPLC LSD</b>	S											E
	<b>BY YEAR TWO-4<sup>th</sup> Quarter:</b> Train helpline staff and volunteers at the next Annual Statewide Legal Aid Conference; promoting meetings of helpline staff and volunteers with AAAs, enhance referrals, publicize helplines on Senior Navigator and other low/no-cost public forums geared to the Senior population (year two). <b>VPLC</b> (Legal Training) and <b>VDA</b> (Administrative & Logistical Support).	<b>VPLC VDA</b>	S											E
	<b>BY YEAR TWO-4<sup>th</sup> Quarter:</b> Provide training in elder law to helpline staff and volunteers at the Annual Statewide Legal Aid Conference. Invite all stakeholders. <b>VPLC</b> (Legal Training) and <b>VDA</b> (Administrative & Logistical Support).	<b>VPLC VDA</b>	S											E



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Major Objectives	Key Tasks	Lead Person	Timeframe (Start and End Date by Month)														
			1	2	3	4	5	6	7	8	9	10	11	12			
3. To foster Private Bar Initiatives & Collaboration	<b>BY YEAR ONE-2<sup>nd</sup> Quarter:</b> Work with Virginia State Bar Senior Lawyers Conference (SLC) to recruit senior lawyers for pro bono, low fee panels, and helplines. Make use of Virginia’s new Emeritus rule; and SLC long-standing interest in elder law. <b>VPLC</b> (Legal Training) and <b>VDA</b> (Administrative & Logistical Support).	VPLC VDA	S						E								
	<b>BY YEAR ONE-4<sup>th</sup> Quarter:</b> Join with the Virginia State Bar (VSB), Virginia Bar Association (VBA) and the Virginia Chapter of the National Association of Elder Law Attorneys (NAELA) to recruit and train attorneys to accept low-income cases through legal services/helplines. Use this as an opportunity to engage other stakeholders in Project 2025. <b>VPLC</b> (Legal Training/Monitoring) and <b>VDA</b> (Administrative & Logistical Support only).	VPLC VDA	S														E
	<b>BY YEAR ONE-4<sup>th</sup> Quarter:</b> Education events. Encourage involvement of legal aid attorneys & paralegals in local elder law bar groups. Use this an opportunity to engage other stakeholders in Project 2025 and statewide planning initiatives to incorporate low-cost legal assistance mechanism into statewide legal service delivery systems. <b>VPLC</b> (Legal Training/Monitoring) and <b>VDA</b> (Administrative & Logistical Support only).	VPLC VDA	S														E
	<b>BY YEAR TWO-4<sup>th</sup> Quarter:</b> Use Annual Statewide Legal Aid Conference to train & recruit private attorneys who agree to take pro bono cases in exchange for free CLE, including ethics credit. Use this as an opportunity to engage other stakeholders in Project 2025. <b>VPLC</b> (Legal Training/Monitoring) and <b>VDA</b> (Administrative & Logistical Support only).	VPLC VDA	S														E



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<p>4.          Establish a system to reach specific target populations, including rural, non-English speaking and those in long-term care facilities</p>	<p><b>BY YEAR ONE-1<sup>st</sup> Quarter:</b> The full-time Elder law attorney at the Virginia Poverty Law Center, Inc. will devote 25% of her time to handling cases for full representation in the following areas: nursing home transfer/discharge, resident’s rights issues, quality of care problems, long term care Medicaid eligibility issues, Olmstead-related cases, and fair housing issues involving the elderly. <b>VPLC</b></p>	<p><b>VPLC</b></p>	<p>S</p>		<p>E</p>										
	<p><b>BY YEAR ONE-1<sup>st</sup> Quarter:</b> Hire a full-time assistant to State Legal Services developer who will devote 100% of his/her time to assisting the legal services developer in the execution and monitoring of this grant and provide logistical staff support and assistance in outreach activities to non-English Speaking Seniors and those in rural areas or long-term care facilities. <b>VDA</b></p>	<p><b>VDA</b></p>	<p>S</p>		<p>E</p>										
	<p><b>BY YEAR TWO-1<sup>st</sup> Quarter:</b> VPLC and State Long-Term Care Ombudsman will collaborate on a series of Audio Teleconferences on long-term care issues, which will be readily accessible by telephone for rural, community based caregivers, and residents and families of long-term care facilities. <b>VPLC</b></p>	<p><b>VPLC</b></p>	<p>S</p>		<p>E</p>										
	<p><b>BY YEAR TWO-1<sup>st</sup> Quarter:</b> VDA and VPLC will collaborate on a series of audio conferences on other elder law issues, which will be readily accessible by telephone for rural, community based caregivers, and residents and families of long-term care facilities. <b>VPLC</b> (Legal Training/Monitoring) and <b>VDA</b> (Administrative &amp; Logistical Support only).</p>	<p><b>VPLC          VDA</b></p>	<p>S</p>		<p>E</p>										



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	<b>BY YEAR TWO-2<sup>nd</sup> Quarter:</b> Elderly clients residing in more remote rural areas will be served through the recruitment of more private attorneys to provide legal services to elderly clients through the local legal aid office.	<b>VPLC</b>	S		E													
	<b>BY YEAR THREE-2<sup>nd</sup> Quarter:</b> VDA will produce pamphlets on general elder law issues that will be translated into Spanish and other languages where there is a high incidence of non-English speaking Seniors. <b>VDA</b>	<b>VDA</b>	S														E	

Major Objectives	Key Tasks	Lead Person	Timeframe (Start and End Date by Month)																
			1	2	3	4	5	6	7	8	9	10	11	12					
5. To develop a statewide system to collect data and report performance results.	<b>BY YEAR ONE-4<sup>th</sup> Quarter:</b> In conjunction with AoA, conduct assessment of current legal needs of older Virginians. Seek assistance from TCSG. <b>VDA with VPLC</b>	<b>LSD</b>	S																E
	<b>BY YEAR THREE-4<sup>th</sup> Quarter:</b> report performance results. Include legal services, helplines and private bar mechanisms in data collection effort. Come up with uniform units/elements for measurement; pioneer this method for other states. <b>VDA with VPLC</b>	<b>LSD</b>	S																E
6. To firmly establish the role and benefits of the model program developed and obtain funding to continue the program after the grant period ends.	<b>BY YEAR THREE-1<sup>st</sup> Quarter:</b> Convene Virginia Elder Rights Coalition (VERC) legal services committee, along with Legal Services Corporation of Virginia (LSCV) Executive Director and other stakeholders knowledgeable about possible resources to identify funding strategies to continue the systematic change initiated by the project. <b>VDA in collaboration with VPLC and Stakeholders.</b>	<b>VDA VPLC</b>	S		E														



# Attachment E

## Letters of Commitment and Support

### **LETTERS OF SUPPORT - GOVERNMENT**

- GOVERNOR OF THE COMMONWEALTH OF VIRGINIA
- VIRGINIA SECRETARY OF HEALTH AND HUMAN RESOURCES
- VIRGINIA OFFICE OF THE ATTORNEY GENERAL

### **LETTERS OF COMMITMENT**

- VIRGINIA POVERTY LAW CENTER, INC. (VPLC)
- LEGAL SERVICES CORPORATION OF VIRGINIA (LSCV)
- OFFICE OF THE STATE LONG-TERM CARE OMBUDSMAN
- VIRGINIA STATE BAR
- VIRGINIA BAR ASSOCIATION
- VIRGINIA ELDER RIGHTS COALITION (VERC)

### **LETTERS OF SUPPORT - STAKEHOLDERS**

- AMERICAN BAR ASSOCIATION (ABA)
- COMMONWEALTH COUNCIL ON AGING (CCA)
- HOUSING OPPORTUNITIES MADE EQUAL (H.O.M.E.)
- SENIORNAVIGATOR
- VIRGINIA ASSOCIATION OF AREA AGENCIES ON AGING (V4A)
- VIRGINIA GUARDIANSHIP ASSOCIATION (VGA)



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## Attachment F

### **Survey on Ensuring Equal Opportunity for Applicants**

N/A for State Government