



PROJECT NARRATIVE

1. PROGRESS TO DATE (FROM 6/1/07 TO 5/31/08)

Virginia's grant program, entitled Project 2025: Enhanced Access to Legal Assistance for Older Americans in Virginia, Funding Opportunity Number: HHS-2006-AoA-SL-0609 has a **two-fold goal**: First, Virginia will strengthen its existing program by involving stakeholders in statewide planning and collaboration. Second, Virginia, in conjunction with 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. These goals will be accomplished through **six major objectives and proposed interventions resulting in:**

1. Enhanced collaboration between Area Agencies on Aging (AAAs) & Legal Aid Programs;
2. Improved visibility and capacity of legal services programs & helplines to serve seniors;
3. Improved collaboration among legal aid programs, the public and private bar, and other stakeholders on behalf of Older Americans in Virginia;
4. Establishment of a system to reach specific target populations, including rural, non-English speaking and those in long-term care (LTC) facilities;
5. Development of statewide system to collect data and report performance results, and
6. The firmly established role and benefits of this model program resulting in continued funding for Project 2025 in Virginia after the grant period ends.

Given the stated goals, objectives, and interventions as outlined in our original proposal, the Commonwealth of Virginia is pleased to report the following **progress to date and anticipated for the period 6/1/07 thru 5/31/08:**

PROGRESS - OBJECTIVE 1

(a). The State Legal Services Director (LSD) to educate AAAs on legal issues and uniform reporting; Work with AAAs and legal aids toward improved collaboration between the two: These tasks are 50% COMPLETE AND IN PROGRESS.



AAA Training. As a follow up to the 2-day training offered to all of the AAA directors last May, a second training opportunity was held in October 2007 during the Annual Statewide Legal Aid Conference and included sessions for AAA directors and staff. A third opportunity, involving extensive assistance from AoA (Director Barbara Dieker and Program Manager Valerie Soroka) and the Center for Social Gerontology (TCSG, a National AoA Support Center), was a presentation on April 24, 2008 to Virginia AAA Directors during a meeting of the Virginia Association of Area Agencies on Aging (V4A).

AAAs and Legal Aids. The Virginia Poverty Law Center (VPLC) Elder Law Attorney, in conjunction with the State Long Term Care Ombudsmen and the LSD, have actively participated in over ten special events specifically designed to improve relationships and collaborative efforts between Virginia legal aid programs and AAA staff. Examples include combined training sessions, task force meetings, workgroups, and presentations throughout the State.

(b). LSD to Develop Model Reporting Form and Train AAAs and legal services to use for the provision of Title III legal services: This task is 75% COMPLETE AND IN PROGRESS.

The LSD in conjunction with stakeholders and TCSG developed an updated and revised Legal Assistance Service Standard for use by Virginia AAAs. Currently, AAA Directors are reviewing the draft and finalization is expected by June 2008.

(c). Standardized Data: This task is 50% COMPLETE AND ONGOING.

The original contemplated reporting methodology has proved to be incompatible with the existing legal services delivery system in Virginia so a new draft was completed in April 2008. This second draft seeks to incorporate existing outcome measurement codes/categories used now by legal aid programs and may be adapted for use by pro bono attorneys.

PROGRESS - OBJECTIVE 2



(a) thru (j). Distribution List Development that includes all stakeholders; Technical assistance by VPLC and State Long Term Care Ombudsmen (SLTCO) to local ombudsmen and AAA staff, legal aid paralegals and attorneys around the State; Functioning Elder Law Task Force that meets quarterly; Elder Law specialist identified in each legal aid office; functioning Elder Law *Listserve*; publicize helplines & other legal assistance mechanisms; update Stakeholders quarterly; and Annual Statewide Legal Aid Conference training for AAA staff and Roundtable Discussion with AAA and Legal Aid Directors. These tasks are **100% COMPLETE and ONGOING.**

Database. The current database of over 50 major stakeholders remains a useful and cost-effective tool. A Project 2025 web site has also been developed to assist other stakeholders and potential stakeholders in Virginia. The web address is www.project2025virginia.org and is sustainable, by contract, through at least May 31, 2012.

Quarterly Updates. Through email and scheduled meetings, quarterly updates continue to be publicized to stakeholders on an ongoing basis.

Technical Assistance and Elder Law Task Force. The full-time attorney at VPLC continues to provide technical assistance to ombudsmen and legal aid attorneys on a variety of legal topics related to the provision of services to the elderly. The attorney, in conjunction with the SLTCO, manages the Elder Law Task Force which includes attendance by ombudsmen from the AAAs, legal services paralegals, and attorneys. The task force meets on a quarterly basis and is a cost-effective mechanism to build bridges between legal services advocates.

Elder Law *Listserve*. The Elder Law Listserv is a cost-effective, electronic method of information exchange, which includes all local and state LTC ombudsmen and various legal services advocates (paralegals and attorneys) from around the state. The Listserv is designed primarily to enable elder law and LTC advocates in obtaining quick assistance on their cases from other advocates around the state.



Publication & Media. Several information documents about Project 2025 in various mediums, including a Project 2025 brochure in English and in Spanish, have been developed.

Law Day Celebration and Project 2025 Website Launch: One of the highlight projects of the last grant year was the development and launch of a Project 2025 website with links to legal aid programs and other advocates (www.project2025virginia.org mentioned earlier). The web site was officially launched on May 1, 2008 in celebration of Law Day and serves as an information and resource tool for service providers.

PROGRESS - OBJECTIVE 3

(a) thru (c). Recruit senior lawyers for pro bono service; Collaborate with the Virginia State Bar (VSB), The Virginia Bar Association (VBA), the American Bar Association (ABA), and the Virginia Chapter of National Association of Elder Law Attorneys (NAELA); Provide education events and free training and Continuing Legal Education Credit (CLE) in exchange for agreeing to take pro bono cases representing older adults: These tasks are **75% COMPLETE and ONGOING.**

Recruitment & Education Efforts. Numerous presentations and outreach efforts were made to various bar groups during the last grant year including the Virginia State Bar's 69th Annual Meeting/Conference (June 14-16, 2007), and at the Old Dominion Bar Association's annual meeting (May 31-June 3, 2007). In an effort to promote awareness and attract potential pro bono attorneys, the LSD continues to attend important meetings of Virginia's bar associations including service on the Virginia State Bar *Access to Justice* committee and *Legal Services Corporation of Virginia's* board of directors.

Pro Bono Pilot Programs. The Project 2025 Private Bar Involvement (PBI) committee has made great strides in increasing awareness and soliciting private attorneys to do pro bono work for older Virginians. The PBI committee successfully planned and held two free Pilot CLEs on targeted substantive law issues in exchange for commitments to handle pro bono cases (either



drafting three documents or one nursing home transfer/discharge case during the next 12 months). Findings and evaluations will be presented at the next Stakeholders Meeting on May 15, 2008. If approved by the stakeholders, eight additional free CLE programs will be held around the state to train attorneys on elder law issues in exchange for pro bono commitments during the next grant year.

PROGRESS - OBJECTIVE 4

(a) thru (b). Full-time attorney at Virginia Poverty Law Center (VPLC) who devotes at least 25% of her time in furtherance of Project 2025 activities; Full-time Assistant to State LSD: These tasks are **100% COMPLETE .**

Elder Law Attorney at VPLC. At present, more than 50% of the Elder Law Attorney's time is directly related to Project 2025 activities including technical assistance to Elder Law Legal Aid Attorneys and Ombudsmen located in AAAs; offering to co-counsel on cases involving nursing home transfer/discharge and other LTC issues, and legal/advocacy training pursuant to the Elder Law Task Force that meets quarterly. This attorney remains an integral part of other legal services networks, such as the Virginia Elder Rights Coalition (VERC), the Project 2025 stakeholders' group, the Virginia Caregivers' Coalition network, and the guardianship network, and in all of these entities, she provides technical assistance, essential legal information and strong advocacy on behalf of Project 2025. She also teaches the Nursing Home Discharge/Transfer session for the PBI Committee's Pilot Pro Bono CLEs.

Full-time Assistant to State LSD. As an update to last year's narrative, Brenda F. Briggs found it necessary to resign effective 2/15/08. VDA was fortunate to find a qualified replacement, Liz Riggs, M.P.A., who was hired in March 2008 to work exclusively with Project 2025. Ms. Riggs first joined VDA in August 2006 as a Graduate Fellow representative of Virginia Commonwealth University's School of Government and Public Affairs. Ms. Riggs' main contributions were to Virginia's "No Wrong Door" initiative (Aging and Disability Resource Center or ADRC grant) and



its web portal, “*Virginia Easy Access*”. She has experience as a grant writer, organizer, collaborator, project manager, and is a trained paralegal. Ms. Riggs will continue to support the LSD in the execution and monitoring of this grant, and will provide ongoing assistance with the outreach activities to non-English Speaking Seniors and those in rural areas or LTC facilities.

(c) thru (d). Audio Teleconferences by VPLC Elder Law Attorney and State Long-Term Care Ombudsmen (SLTCO); Teleconferences by VPLC Elder Law Attorney and State LSD; and Focus on recruitment in rural areas: These tasks are 25% COMPLETE AND ONGOING.

VPLC and SLTCO. Plans have been developed for these teleconference events and implantation is now planned for Year-3 of the grant period (rather than Year-2). VPLC will do training at the June 2008 Virginia Caregivers Coalition meeting (with teleconferencing to several sites around the state) on nursing home transfer/discharge rights. By teleconferencing in several sites around the state, rural areas can be reached.

VPLC and VDA. Through a collaborative effort of SLTCOP, VPLC and VDA, a series of audio teleconferences on LTC and other elder law issues have also been planned for the coming grant year. The series will be comprised of one-hour programs with call-in capability which could reach rural seniors, caregivers and others who may have difficulty getting to in-person community education events.

(e). Pamphlets on Elder law: This task is 100% COMPLETE AND ONGOING.

Elder Law Task Force and Virginia Elder Rights Coalition Collaborative Work – Nursing Home Transfer/Discharge Rights. A “Senior-friendly” flyer on Nursing Home Transfer/Discharge Rights was developed and 4500 copies printed. These flyers are being distributed to ombudsmen and legal services advocates around the state. Plans are underway to translate this English version into Spanish for additional distribution.



ABA Commission on Law & Aging. Rather than a duplication of effort, Virginia will take advantage of the free materials offered by the ABA, already translated in Spanish, on “Legal Tools for Preserving Your Personal Autonomy.” And while not specific to Virginia law, these materials are user-friendly, well developed and address major legal issues of interest for older adults. These materials were ordered in April and are expected before the end of this project year. Plans are underway to distribute these materials throughout the Commonwealth once received (Brochures, DVDs and VHS formats).

(f). Remote/Rural attorneys: This task is 50% COMPLETE AND ONGOING.

Big Stone Gap Virginia (far southwest Virginia in rural area). Project 2025 co-sponsored and provided a presentation in conjunction with a Law Day-type event held at one of the AAAs in a very remote area of the state (Mountain Empire Older Citizens, Inc.). Additional outreach efforts are planned to engage organizations working with immigrant groups with high elderly populations to determine their legal needs, offer community education, and provide information on available legal services.

PROGRESS - OBJECTIVE 5

(a). Conduct Assessment of current legal needs of older Virginians: This task was revised and is 100% COMPLETE.

TCSG and AoA Assistance. With significant assistance from TCSG, AoA, the Secretary of the Commonwealth, the AAAs, Legal Aid programs, VSB and other major stakeholders, a survey of AAAs was developed, completed and results analyzed to compare with results obtained from a prior statewide legal aid survey (less than three years old). Because results were comparable, Stakeholders believed it best to accept these results (legal needs assessment for older adults in Virginia) as a starting point rather than expending additional resources in conducting a more formalized study.



(b). Statewide and Uniform Reporting Measurements: This task is 50% COMPLETE AND IN PROGRESS.

Stakeholders, including AAAs and legal services, were successfully brought together to work on the legal services standard and reporting forms. More discussions between AAAs and legal services directors will be needed in the coming year regarding the legal services standard and reporting measures, targeting both the types of legal services provided and those in greatest economic and social need.

PROGRESS - OBJECTIVE 6

(a). Identify Funding Sources to Continue Project 2025: This task is 50% COMPLETE AND IN PROGRESS.

All projects of Project 2025 have pointed to the benefit of having a paid full- time legal services developer at VDA and to what can be accomplished with someone focusing full time on the legal needs of Virginia’s seniors and how to enhance the availability and accessibility of legal services to elderly around the state. The development of a broad group of strong and committed stakeholders has focused attention on the delivery of legal services to the elderly in Virginia, and bringing those stakeholders together over three years to work collaboratively on the grant has increased the commitment of these stakeholders to continuing the work of Project 2025 after the 3-year grant ends.

Next year the Project 2025 Management Team, comprised of the LSD, the project assistant, the VPLC Elder Law attorney, and the State LTC Ombudsman, will encourage VDA to seek funding to enable the full-time work of the LSD and ask stakeholders to advocate to the General Assembly for funding for a full-time legal services developer (LSD). If the General Assembly does not fund a full-time LSD, then the project management team will urge VDA to seek funding from foundations or other sources to fully fund a full-time LSD at VDA and to fund the continuation of the work of Project 2025.



2. PROPOSAL FOR THE COMING YEAR

Year-3: June 1, 2008 – May 31, 2009

There are no significant changes. As noted in last year's proposal, Virginia intends to fully complete Project 2025 initiatives by requesting a "no-cost extension" at the conclusion of the 3rd Year project end-date of May 31, 2009.

A. Summary/ Abstract. In accordance with the revised timetable submitted last year, the activities of the coming year will focus on finalizing the model reporting form, development and trainings on the use of current and revised forms, conducting a series of audio conferences to reach rural and target populations, promoting the use of the *Project 2025* website, and continuing the networking and collaboration through the stakeholders meetings and other events sponsored by stakeholders. At each event, we will continue to seek opportunities to present Project 2025, recruit potential pro bono attorneys and/or host a display table.

B. Goals, Objectives, and Outcomes. There are no changes in this area.

C. Intervention/Overall Approach. There are no changes from the original application.

D. Evaluation. The original grant proposal includes a work plan that serves as a tracking sheet for monitoring accomplishments. Development of evaluation instruments remains an expected outcome.

E. Dissemination. Dissemination that has already occurred includes the following: communication at the 2006 Annual Statewide Legal Aid Conference as well as the 2007 conference, commissioning of a Project 2025 tote bag and other promotional items, development of a project profile sheet, a Project 2025 brochure (English and Spanish translation), elder law materials, and Nursing Home Transfer/Discharge Rights flyers; and the



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May 1, 2008 launch of the Project 2025 website. During the next grant period we will continue to promote the Project 2025 website and other elder rights materials throughout the Commonwealth, specifically targeting rural areas, non-English speaking and those in long term care facilities or at risk of placement.

F. Project Management. The Project Management Team continues to provide monitoring and oversight of Project 2025, its goals, objectives, strategies and expected outcomes by meeting frequently and as needed.

G. Work Plan. There are no significant changes in the work plan for the coming year.