

Appendix B – Program Narrative

San Bernardino County Veterans Affairs

Veterans Free Legal Clinics

Program Narrative

Section A: Statement of Need (500 words max)

Southern California has one of the highest veteran populations in the nation. The most recent Community Indicators Report for 2020 shows San Bernardino County is home to over 101,000 veterans, which is 4.4% of San Bernardino County’s population. In addition, nearly 7% of San Bernardino County veterans are living below the poverty line, with 4% being unemployed. The veteran population spans all eras of service: Post 9/11 (24%), Gulf War (22%), Vietnam Era (33%), Korean War (5%), and World War II (2%). At least 32% of the veteran population reports some level of disability and over 44% are older veterans aged 65 and up. Minority and women veterans are disproportionately affected by homelessness. In recent years, the Veterans Administration Hospital in Long Beach recognized women veterans are their fastest growing group. Recent studies note Military Sexual Trauma (MST) is greatly under reported, and women veterans are more likely to commit suicide than civilians.

To reach transitioning service members, veterans (including those attending Community Colleges), and families, San Bernardino County Veterans Affairs (VA) will host a monthly free legal clinic at the VA’s office dedicated to outreach removing barriers for those without reliable transportation, internet, or phones. Through a continuing Memorandum of Understanding (MOU) with Veterans Legal Institute (VLI), the VA will focus on homeless and/or low-income clients whose access to or maintenance of mental health treatment requires direct legal aid, they could otherwise not afford. Low income clients may earn on average less than \$1,500 per month. Veteran college students may be living in cars, couch surfing, or living frugally on their educational benefits. We expect to continue to serve veterans living with significant mental health issues. Veterans who do exceed low or moderate income (LMI) will be provided with general advice and counsel with referrals to veteran advocate attorneys. The geographic area focus is San Bernardino County.

Participants will be identified and engaged during intake interviews and/or referrals. We expect service members, family advocates, or collaborating agency referrals requesting legal assistance for mental health issues.

The VA has an ongoing relationship with the six Community Colleges in the county. The VA has implemented a Welcome Home Program in May 2020 which provides veterans newly discharged from active duty information for county and local services available to them and their families at no cost. Community colleges include: San Bernardino Valley, Crafton Hills, Chaffey, Victor Valley, Copper Mountain, and Barstow.

VLI has significant impact as one of the few public interest law firms in the nation dedicated to veterans. Since its founding, VLI has opened over 8,000 cases and restored over two and a half million dollars in veterans benefits, with over 572 cases for San Bernardino County

veterans when they had no other recourse. VLI co-sponsors veteran summits, provides leadership in local collaborations and Orange County Veterans and Military Families Collaborative, receives significant awards, is recognized by California as a “multiple activity provider,” and regularly offers the 3-hour VA Accreditation course.

Section B: Proposed Service/Project (1000 words max)

Project’s Purpose:

The purpose of the Veterans Free Legal Clinic is to provide outreach for transitioning service members, veterans (including those attending California Community Colleges), and their families to remove legal barriers preventing access to or maintenance of mental and physical health care.

Project’s Goals:

1. Increase the number of clients receiving access to mental health treatment as a result of civilian or military legal barriers being removed.
2. Increase the number of clients receiving mental health resource information.
3. Quantify the number of transitioning clients requesting free legal aid to access mental health treatment.
4. Quantify the number of underrepresented clients requesting free legal aid to access mental health treatment.

Project’s Objectives:

1. Host a monthly, 3 hour, free legal aid clinic on site at the VA, for a total of 12 clinics over the course of a full calendar year; a total of 24 clinics over the 2-year project. VLI will also accept incoming referrals, including those related to veterans benefits and disability claims among other related issues.
2. Provide capability to directly serve up to 9 clients/families per clinic.
3. Offer 100% of clients mental health resource information (flyers, brochures) on local, state, and federal levels.
4. Clinics are currently virtual and will resume in person when safe to do so. Free legal services and clinics continue virtually with the support of telephone appointments, Zoom, and increased proactive email and US Postal Service mail. For veterans who require additional compassionate support, VLI invites them to the VLI office in Tustin, and they are seen by appointment in a physically distanced and sanitized setting to handle complicated interviews, document preparation and more.

Services:

In support of the clinics, the VA will provide office space, set and greet appointments, and inform clients about local mental health resources. Clients and/or their family members can make appointments by phone or walk in during clinic hours. Collaborating agencies can make referrals. To help publicize the free legal clinics, the VA will advertise dates and hours on their website and post flyers. For those clients who cannot attend the clinic times and require legal advice, VA will refer clients to VLI for care.

VLI will provide free legal aid for the monthly clinic held at the VA and accept all legal referrals. Being military specific, VLI will ensure attorneys and supporting staff have military experience and/or are military dependents. VLI will provide free legal services for civilian and military legal matters. Specialized areas of the law will be matched to local pro bono attorney firms. Pro bono legal services will include (but may not be limited to): veterans benefits, disability compensation, limited family law, limited housing, employment, discharge upgrades, criminal law, consumer law, and community development. For clients who do not meet the income requirements to be retained and require legal services, they will be referred to local attorneys who are veteran advocates. No client or family will ever receive a bill. Clinics are currently virtual until safe to resume in person.

Section C: Proposed Implementation Approach (1500 words max)

Anticipated Impact:

The VA and VLI expects the Veterans Free Legal Clinics will address 12 of the 13 strategies described in Section 1B. Because this clinic will focus on outreach activities and removing legal barriers to access, the recommendation that the VA and VLI cannot meet is incorporating best practices for mental health treatment. However, we will ensure our clients receive information and referrals to local providers who already follow the Substance Abuse and Mental Health Services Administration’s evidence-based programs and practices.

To further address the Section 1B recommendations, San Bernardino Veterans Affairs and VLI will be able to:

1. Leverage office space, websites, and social media presence to provide widest range of information on mental health service for transitioning and underrepresented service members, veterans, and families.
2. Leverage current federal, state, and community-based service providers and institutions of higher learning. VLI has long-standing relationships within the community college network and continues to develop new relationships with Veterans Resource Centers in the Community Colleges in San Bernardino County.
3. Enhance access to mental and physical healthcare of veterans and families by removing legal and administrative barriers for veterans and families-
4. Reduce stigmas and promote programs to empower mental health by fully utilizing our proven peer support approach.
5. Promote programs that encourage early intervention of mental health needs to seek help by leveraging relationships with evidence based mental health organizations at local, state, and national levels.
6. Promote services to veterans who are “justice involved”, specifically criminal diversion and veteran treatment court participation with leveraging relationships with Court and pro bono attorney base.
7. Identify and provide referrals for underserved populations by leveraging paid and volunteer staff, as well as established cadre of over 80 pro bono attorneys - which includes close collaboration with David Ruegg, Esq, who is connected to the East West Family Law Council, the San Bernardino Bar, and Riverside Bar.
8. Provide homeless veterans with housing support that includes mental health care by using existing collaborations- eg. VLI’s relationships with Affordable Housing Access

- and Volunteers of America (which has repeated success in securing up to 5 month's rent to help stabilize housing).
9. Reducing eligibility and enrollment barriers through expert staff in Veterans Affairs and legal services.
 10. Assist CalVet in optimizing system-wide health care delivery specifically in the area of access through VLI's Clio system and experienced data analysis/program management volunteers.
 11. Meet all application and reporting deadlines using our current staff and volunteer resources, which can include cloud sharing data and files.

Relevant Results:

Achieving the goals of the Veterans Free Legal Clinics will produce meaningful results by empowering our clients and their families to realize their potential for full, self-sufficient, and connected lives. When access to legal aid is made to those who could otherwise not afford it, lives are changed - one individual or family at a time. The VA and VLI are visible in the veteran community. Including 12 additional free legal clinic dates will increase access, availability, and outreach for service members or family advocates by leveraging our combined resources and collaborations. In fiscal year 2019-20, 98 veterans were served by VLI, and in FY 2020-21, 108 veterans were served by VLI. In 2021, at least 30% of VLI clients were served through its mobile clinics due to the COVID-19 pandemic; requests included veterans benefits, estate planning, housing, family law, consumer law and expungements; ages ranged from 19 to 103 with an average of 51 years of age; and improved the quality of life for over 350 dependent children. Having access to a legal advocate during the pandemic has been life-changing and life-saving for veterans who have been experiencing even greater levels of anxiety, confusion, and isolation from the complications of losing income, confusion with eviction protections, interruptions to healthcare, Court and government agency closures and more. These veterans have been at increased risk of homelessness, hopelessness and suicide.

Facilitating Screening, Assessment, and Referrals:

The VA and VLI will work in tandem with our local evidence-based practitioners.

Unduplicated Individuals:

The Veterans Free Legal Clinics will serve up to 80 unduplicated individuals annually for a total of up to 160 over the 2-year project period. Services that will be provided are informing and referring clients to mental health resources and removing legal barriers to mental health care. The legal barriers may be general civilian, military specific, or justice involved. The anticipated outcome is that these clinics will increase the number of homeless, low income, disabled, and/or at-risk clients who can access or maintain mental health care.

Other Organizations:

Veterans Legal Institute will be the primary collaborator. Their role and responsibilities will be to handle all qualified client legal issues so that our target clients and families can increase wellness, both mentally and physically. We understand there are complex factors leading to

being justice involved, homeless, and/or low income that legal intervention can turn around. VLI has included a letter of support.

Potential Barriers:

We expect to navigate barriers with time, combat experience, and gender.

For time, an average case can take 15 hours before being resolved. In Military Sexual Trauma, this average jumps to 500 hours because of case complexity. In addition, legal assistance can range from needing a week to 9 months to complete. So, reporting the dollar amount or verification of access to life empowering mental health care will be affected. This can be overcome with categorizing cases as initiated, in progress, and completed.

Successful Prior Experience:

Through VLI, the VA's Mental Health Outreach has been able to serve 216 veterans as of December 31, 2021.

VLI has a history of depth and success with multiple strategic outreach clinics through Orange, Los Angeles, San Bernardino and Riverside Counties. VLI is in its fourth year of operations of Proposition 63 MHSA funded clinics at the OCVSO location, and is halfway through its second successful year in San Bernardino and Riverside where clinics are booked several months in advance. VLI has managed over 572 matters for San Bernardino County veterans to date. Veterans have been grateful for the support and have shared:

“Thank you so much for your support to us veterans. You relieve the stress of legal issues.”

“I truly appreciate all the help that VLI has provided. It has made all the difference in the world and now I have a second chance to get my affairs in order and have a successful future.”

VLI, in partnership with the Starbucks Armed Forces Network, was the first to bring “Military Mondays” to the West Coast and has successfully run a clinic at the Veterans Administration in Long Beach and a clinic across from Santa Ana's homeless quarter.

In addition, VLI hosts clinics at Saddleback College and the City of Mission Viejo. In October 2016, VLI added a North County Vet Clinic. Each of the clinics has the primary purpose of outreach, presentations, and one on one meetings to remove legal barriers preventing transitioning service members, veterans, and their families from being self-sufficient. VLI has empowered their clients to stay in homes, gain educational benefits, receive health care, and improve employment. Further, VLI has experience in serving student veterans, transitioning service members and veterans who are women, justice involved, and those who self-identify as Native American and LGBTQI.

Since July of 2019, VLI has successfully conducted clinics at the VA office. Veterans were prescreened to ensure they would have all the necessary documentation for the VLI attorneys, and all appointment times were coordinated by VA staff prior to VLI arriving on site. In addition, a large conference room was provided for VLI to conduct their in person interviews

with the veterans. Once the legal clinics were changed to virtual in March of 2020 due to the ongoing pandemic, VLI continued their uninterrupted legal aid for veterans by telephone. Conducting the legal clinics via telephone did not affect a decrease in veterans being seen, but actually ensured that VLI could provide legal services to more veterans due to the efficiency of the telephone. The VA collaborated with VLI staff to support virtual operations, ensuring that veterans received the support they needed, eliminating any confusion or anxiety veterans might have had due to COVID-19.

Sustainability Plan:

VA and VLI are committed to continuing outreach and direct service based on VLI’s success with this grant over the past three years. VLI will leverage existing relationships with Community Colleges, direct donations, an increasing volunteer development base for grant writing and fundraising, our annual Lawyers for Warriors Networking and Fundraising Event which now sells out to over 400 attendees, return investments with ongoing support from the Orange County Bar Association Charitable Fund and the State Bar of California amongst others, and new grant and fellowship opportunities.

Section D: Performance Assessment and Data (1,000 words max)

VLI will collect, manage, and assess data using and their detailed intake form and extensive computer reporting system called Clio.

VLI’s intake form is kept on file and documents:

1. Name/address/phone/email
2. DOB
3. Service branch
4. Years of service
5. Current status (disabled, veteran, reservist, active service member)
6. Post 9/11
7. Household income
8. Gross monthly income
9. Household assets/value
10. Type of legal service seeking (discharge upgrade, veteran benefit appeals, expungement, etc.)
11. Description of issue and assistance sought.

Clio defines various types of outcomes/outputs for education, employment, housing, and healthcare -- including specificity for mental health. For general civilian legal issues, Clio reports on money won, money waived, reason closed, and how the case was resolved. In military specific areas, Clio measures outcome achieved and what types of benefits are newly achieved as a direct result, whether monetary or in terms of benefits now accessible.

Performance Metric	Data Source	Goal	Quarter 1A	Quarter 2A	Quarter 3A	Mid-Program Review
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<p>#1) Increase number of clients receiving legal aid to remove legal barriers preventing access to or maintenance of behavioral healthcare.</p>	<p>Data will come from VLI as they use intake forms and update results in Clio.</p>	<p>Up to 80 unduplicated clients/year for a total of 160 by the end of the project.</p>				
<p>#2) Increase number of clients receiving mental health resource information</p>	<p>Data will come from VLI staff reports on clinic activity.</p>	<p>100% of clients will be offered mental health resource brochures and flyers</p>				
<p>#3) Quantify number of transitioning clients.</p>	<p>Data will come from VLI as the complete intake forms and update Clio.</p>	<p>100% of target clients will be included in counts.</p>				
<p>#4) Quantify number of underrepresented Veterans referred to evidence based mental health professionals. To include women Veterans, Native American Veterans, LGBTQI Veterans, Other Than Honorable Discharged Veterans, and</p>	<p>Data will come from VLI as they use intake forms and update Clio.</p>	<p>100% of target clients will be included in count.</p>				

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Justice Involved Veterans.						
Performance Metric	Data Source	Goal	Quarter 1B	Quarter 2B	Quarter 3B	Final
#1) Increase number of clients receiving legal aid to remove legal barriers preventing access to or maintenance of behavioral healthcare.	Data will come from VLI as they use intake forms and update results in Clio.	Up to 80 unduplicated clients/year for a total of 160 by the end of the project.				
#2) Increase number of clients receiving mental health resource information	Data will come from VLI staff reports on clinic activity.	100% of clients will be offered mental health resource brochures and flyers				
#3) Quantify number of transitioning clients.	Data will come from VLI as the complete intake forms and update Clio.	100% of target clients will be included in counts.				
#4) Quantify number of underrepresented Veterans referred to evidence based mental health professionals. To include women Veterans, Native	Data will come from VLI as they use intake forms and	100% of target clients will be included in count.				

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American Veterans, LGBTQI Veterans, Other Than Honorable Discharged Veterans, and Justice Involved Veterans.	update Clio.					
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Appendix C – Budget Form

San Bernardino County Veterans Affairs Veterans Free Legal Clinics Budget Form				
A. Personnel				
Position	Hourly Wage	Hrs/Mo Spent on Program	Mo/Yr Spent on Program	Cost
Executive Secretary II	\$28.36	18.73	24 Months	\$12,750
[Insert Position]	[Insert Wage]	[Insert Hours]	[Insert Months]	[Insert Cost]
			Total	[\$[Insert Cost]]
B. Fringe Benefits				
Component	Rate	Annual Wage	Cost	
[Insert Component]	[Insert Rate]	[Insert Annual Wage]	[Insert Cost]	
[Insert Component]	[Insert Rate]	[Insert Annual Wage]	[Insert Cost]	
[Insert Component]	[Insert Rate]	[Insert Annual Wage]	[Insert Cost]	
		Total	[\$[Insert Cost]]	
C. Travel				
Location	Purpose	Rate (Mileage Only)	Cost	
[Insert Location]	[Insert Purpose]	[Insert Rate]	[Insert Cost]	
[Insert Location]	[Insert Purpose]	[Insert Rate]	[Insert Cost]	
[Insert Location]	[Insert Purpose]	[Insert Rate]	[Insert Cost]	
[Insert Location]	[Insert Purpose]	[Insert Rate]	[Insert Cost]	
		Total	[\$[Insert Cost]]	
D. Supplies				
Items	Rate (Cost x Months)		Cost	
[Insert Items]	[Insert Rate]		[Insert Cost]	
[Insert Items]	[Insert Rate]		[Insert Cost]	
[Insert Items]	[Insert Rate]		[Insert Cost]	
	Total		[\$[Insert Cost]]	
E. Contracting				

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Name	Service	Rate (Cost/Individual x Individual x Days)	Cost
Veterans Legal Institute	Free Legal Services	\$531.25/individual x up to 80 individuals per year x 2 years	\$85,000
[Insert Contractor]	[Insert Service]	[Insert Rate]	[Insert Cost]
		Total	\$85,000
F. Other			
Item	Rate		Cost
[Insert Item]	[Insert Rate]		[Insert Cost]
[Insert Item]	[Insert Rate]		[Insert Cost]
[Insert Item]	[Insert Rate]		[Insert Cost]
	Total		\$(Insert Cost)
Totals			
Section A: Personnel	[Insert Cost]	Section D: Supplies	[Insert Cost]
Section B: Fringe Benefits	[Insert Cost]	Section E: Contracting	[Insert Cost]
Section C: Travel	[Insert Cost]	Section F: Other	[Insert Cost]
		Total Requesting	\$97,750

Appendix D – Budget Narrative

San Bernardino County Veterans Affairs Veterans Free Legal Clinics Budget Narrative
Section A: Personnel
<p>The VA provides administrative support for the legal clinic throughout the month. These tasks are the major tasks performed by staff:</p> <ol style="list-style-type: none">1. Make appointments for veterans.2. Respond to telephone calls to explain the program and services offered.3. Call veterans to confirm their appointment the day prior to the clinic.4. Setup each of the two conference rooms with a copy machine, scanner, and printer.5. Provide administrative support to VLI attorneys.6. Assist veterans with completing the legal clinic intake form prior to appointment.7. Hand out and collect evaluation form.8. Escort veterans to and from VA lobby to conference room for appointment. <p>Hourly breakdown during each month: Day of clinic – 8 hours Clinic scheduling support: 10.7 hours Executive Secretary II cost - \$28.36 per hour Annual Support hours: 224.76 Annual Support cost: \$6,375 x 2 year project period = \$12,750</p>
Section B: Fringe Benefits
[Insert Text Here]
Section C: Travel
[Insert Text Here]
Section D: Supplies
[Insert Text Here]
Section E: Contracting

The VA does not have legal staff and will contract with Veterans Legal Institute (VLI) – who is a military specific, pro bono legal aid organization with a history of serving our San Bernardino veterans when they have had no other recourse to free legal aid. While other public interest firms assist low-income clients in San Bernardino County, they do not have a publicized focus on veterans or specialized veteran programs or units. As such, VLI has unique and successful experience empowering our transitioning, student, and underrepresented veterans and is capable of travel to San Bernardino County VSO to provide the monthly on-site clinic while managing legal cases from its home office in Santa Ana, CA. Since its founding in 2014, VLI has opened over 8,000 cases and restored over two and a half million dollars in veteran benefits. In 2021, VLI recovered or restored over \$1.3MM in monetary benefits. VLI has managed over 572 matters for San Bernardino veterans. VLI's client population is 16% women veterans, which is double the estimate of women veterans making up 8% of the total veteran population in California.

All of the management has military experience and most of the staff are either veterans or veteran spouses. VLI uses a standard intake form. VLI will complete all work in house and will reach out to other pro bono attorneys in San Bernardino County for specialized areas of the law if needed. No veteran in need will ever receive a bill. In this way, VLI validates recent published findings that veterans accept more resources and have better outcomes through peer contact.

VLI will leverage their matching grants and leadership collaborations. This will include VLI's continuing partnerships with the Orange County Bar Association Charitable Fund, the State Bar of California with IOLTA/EAF funding, and build upon the network and history of collaboration in The Orange County Veterans and Military Families Collaborative which represents over 80 organizations, many of which have relationships with San Bernardino County organizations. VLI has a platinum rating with Guidestar, and is accredited through The Patriots Initiative.

Further, VLI will leverage its relationships with San Bernardino County attorneys in private practice. David Ruegg, Esq has already expressed commitment to coordinating pro bono attorneys in his San Bernardino and Riverside County bar groups and East West Family Law Council. Mr. Ruegg has also received confirmation that multiple attorneys with Holstrom, Block & Parke, APLC will support the San Bernardino VSO clients. They include Dayn Anthony Holstrom, Esq., Ronald Burton Funk, Jr., Esq., and Michelle M. Brooker, Esq. Many of these attorneys practice in both Riverside and San Bernardino County.

The contract will be through a Board of Supervisors' approved MOU between the County VA and VLI. VLI will provide the legal services to transitioning and underrepresented veterans through 12 monthly clinic dates and referrals over the course of one calendar year, for a total of 24 in the 2-year period. From VLI's past experience, they expect to serve up to 80 unduplicated veterans over the course of the clinics and referrals per year, for a total of up to 160 unduplicated veterans over the 2-year period. MHSA 2022/2023/2024 funding will cover personnel costs to provide direct legal services, including recruitment and coordination of pro bono attorneys. VLI will leverage other expenses for fringe, necessary insurances and malpractice, postage, printing, legal software, internet, and training through other funding

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sources. Conservatively, a client receives an average value of \$400 per hour in private bar rates that the veteran would otherwise not be able to afford. VLI will leverage managing attorney, law clerks, and data.

Contracting:

Approximately 0.70 FTE Staff Attorney at base salary of \$60,570 per year x 2 years = \$85,000
Total requested = \$85,000

Total cost per individual = \$85,000/160 projected clients over project = \$531.25/individual

Section F: Other

[Insert Text Here]