



# The State Bar of California

## LEGAL AID DASHBOARD METHODOLOGY

This document outlines the methodology behind the visualizations on each page of the dashboard, explaining how the data is defined, calculated, and interpreted. See the end of this document for definitions of each area of law and a full list of legal outcomes.

### Grantees and Funding Trends

- Data reflects grantees and grantee funding for all legal aid organizations that received IOLTA/EAF funding from the State Bar of California. County public defender offices that received CARE Act funding are not included.
- Due to rounding, numbers presented throughout the dashboard may not add up precisely to subtotals and totals.

### IOLTA/EAF Funding Map

- To calculate county level estimates, each Qualified Legal Service Project's (QLSP's) total cases closed were allocated across counties according to the share of the QLSPs' expenditures attributable to each county. This approach assumes that for each QLSP, the distribution of cases across counties is proportional to the distribution of qualified expenditures across those counties.
- County-level data about the population less than 200 percent of the federal poverty level is from the 2024 American Community Survey (ACS) five-year estimates.

### Staffing

- Staffing data is a point-in-time count on December 31 of that year.
- Legal aid organizations provide staffing data to the State Bar in IOLTA/EAF applications. For example, 2023 staffing data was provided in 2025 IOLTA/EAF applications that were due in Spring 2024. Since staffing data is provided in future year applications, staffing data is unavailable for a small number of legal aid organizations that did not apply for funding in subsequent years. For example, if an organization was an IOLTA/EAF grantee in 2023 but did not apply for IOLTA/EAF funding in subsequent years, staffing data would not be available for that organization for 2023 since it was not provided in the 2025 year application.
- Support staff consist of paralegals, professional services, clerical/admin, and other staff.

### Clients Served

- Client counts are case based and do not represent unique individuals; clients with multiple cases may be counted more than once.
- Data about California Residents below 200 percent of the federal poverty line is from the 2022 ACS five-year estimates, with the exception of the proportion of California residents that have limited English proficiency, which is from UCLA's 2022 California Health Interview Survey (CHIS) and age data which is from the 2024 ACS. Data on California residents' age is for California residents at the federal poverty level or below; all other characteristics are reported for California residents with income below 200 percent of the federal poverty level.

- Demographic values coded as 'Unknown' are excluded from visualizations and from the calculation of category percentages.
- Grantees report only the number of individuals within each special population category (veterans, limited English proficiency, people with disabilities) and do not report the number who are not in these categories or whose status is unknown. Therefore, the proportion of clients within each group may be undercounts, since this calculation assumes that all individuals with unreported or missing statuses are not members of these categories.

### **Legal Cases & Nonrepresentational Services**

- Legal cases and nonrepresentational services are only provided by QLSPs. Support center activities are included in the "Impact Litigation and Advocacy" page.

### **Impact Litigation and Advocacy (ILAW)**

- ILAW data is reported by QLSPs and support centers.
- Legal aid organizations only report areas of law and impacted communities for the top 10 impact litigation cases and/or advocacy activities that the organization engaged in that exceeded 50 hours of staff time, as determined by the number of staff hours spent on the case or activity, regardless of the funding source. ILAW data missing a case status is not included in the data.
- ILAW activities can be across multiple areas of law and impact multiple communities simultaneously. Because a single activity can be attributed to more than one substantive area and community, percentages total more than 100 percent.

### **Legal Outcomes ("Main Benefits")**

- Main benefits are reported by QLSPs for all benefits accrued in the year across all sources of funding. QLSPs are instructed to report benefits for limited and extended services, but most QLSPs are unable to report on benefits for limited services cases because they do not continue communication with limited service clients to collect outcomes.
- QLSPs can report multiple legal outcomes per case, therefore total counts of legal outcomes and people in household helped do not reflect unique cases or counts.
- People in household helped may be underreported since some QLSPs do not report this data point.

### **Economic Outcomes**

- Economic benefits are reported by QLSPs for all benefits accrued in the year across all sources of funding. QLSPs are instructed to report economic benefits for limited and extended services, but most QLSPs are unable to report on economic benefits for limited services cases because they do not continue communication with limited service clients to collect outcomes.
- Financial awards/benefits obtained includes back awards, lumps sum settlements, sanctions, or monthly benefits. The total lump sum for monthly benefits with a set time is provided, however only one month's benefits is reported for monthly benefits obtained for an unknown period of time.
- Data reflects direct economic benefits to clients, not including any community or taxpayer savings.

## **AREAS OF LAW (LEGAL PROBLEM CODES)**

1. **Conservatorship** refers to all types of conservatorship proceedings, including Probate, Limited, general, and Lanterman-Petris-Short Act (LPS) conservatorships.
2. **Consumer/Finance** refers to Bankruptcy, Debtor Relief, Collections (including Repossession), Garnishment, Contracts, Warranties, Credit Access, Loans, Installment Purchase, Unfair Sales Practice, or other consumer finance matters.
3. **Disability Rights** refers to Disability, including Mental Health Rights.
4. **Domestic Violence** refers to abuse perpetrated against any of the individuals identified in the Domestic Violence Protection Act, California Family Code §6211.
5. **Education** refers to Discipline (including Expulsion and Suspension), Special Education, Learning Disabilities, Access, and other education matters.
6. **Employment** refers to Job Discrimination, Wage Claims, Employee Rights, and other employment matters. (Note: Earned Income Tax Credits should be captured under Miscellaneous).
7. **Family** refers to Adoption, Custody, Visitation, Divorce, Separation, Annulment, Parental Rights Termination, Paternity, Support, and other family matters. (Note that Name Changes should be captured under Miscellaneous).
8. **Guardianship** refers to cases brought by persons other than the child's parent seeking to be appointed guardian of a minor by the probate or other court.
9. **Health and Long-Term Care** refers to Medicare, Medicaid, Medi-Cal, and other health and long-term care matters.
10. **Housing** refers to Federally Subsidized Housing Rights, Foreclosure or Title Fraud, Landlord-Tenant (including Foreclosure Evictions), Public Housing, Homelessness, and other housing matters.
11. **Immigration** refers to Naturalization, Asylum, Adjustment of Status, Citizenship, Family Petition, Special Immigrant Juvenile Status, Trafficking, T-Visa, U-Visa, and other immigration matters.
12. **Income Maintenance** refers to CalWorks, Food Stamps, Social Security, SSI, Unemployment Compensation, Veteran Benefits, Workers' Compensation, and other income maintenance matters.
13. **Juvenile** refers to obtaining adoption, or emancipation, delinquent, neglected, abused, dependent, and other juvenile matters.
14. **Miscellaneous** includes Incorporation, Corporate Dissolution, Indian and Tribal Law, License (auto and others), Taxes, Torts, Wills, Estates, Prisoners' Rights, and other individual rights matters.
15. **Access to Justice** includes measurable benefits that could not be captured in other substantive areas. These benefits might consist of increased individual access or a much broader impact than to the individual served.

## LEGAL OUTCOMES (“MAIN BENEFIT CODES”)

### Conservatorship

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

### Consumer/Finance

- CF1. Obtained federal bankruptcy protection Includes obtained discharge of debt, prevailed in adversarial proceeding or otherwise secured federal bankruptcy protection.
- CF2. Prevented repossession, prevented, or reduced deficiency judgments (secured or unsecured, not housing) Includes prevented repossessed vehicle or personal property, provided relief from defective notices, and defective sales procedures.
- CF3. Ended or reduced debt collection or wage garnishment and enforcement of fair debt collection Includes ended or reduced garnishment or levy and enforced state and federal fair debt collection rights. Includes “stop contact” letters, and stopped creditor harassment of consumer, regardless of whether or not debt ended or reduced. Issues may involve credit card debt, medical debt, or student loans.
- CF4. Obtained relief from fraudulent sales practices or unlawful, unfair, or deceptive acts or practices Includes unfair and deceptive acts and practices, predatory lending, credit discrimination, and general consumer scams. Issues may involve proprietary trade schools, immigration consultant fraud, auto fraud, credit card contracts, and telemarketing fraud. (Use best judgment whether matter is best reported here or as a breach of contract in number CF5 below.)
- CF5. Enforced sales contracts and/or warranties, including breach of contract Includes enforced sales contracts, established claims under auto and personal property warranty, and other consumer contract issues.
- CF6. Obtained or preserved credit, or resolved credit reporting errors Includes prevented negative consumer reporting, such as the reporting of an eviction to a landlord registry.
- CF7. Prevented or delayed utility termination, or obtained utility services
- CF8. Resolved issues related to identity theft Includes obtained fraud alerts on credit reports, drafted reinvestigation letters, and resolved other identity theft issues.
- CF9. Obtained protection from financial abuse Includes resolved finance abuse related to domestic violence and abuse of elders, dependent adults, and children.

- CF10. Obtained reasonable and affordable loan Includes obtained modifications of existing loans or obligations as well as new loans, obligations, or extensions of credit; includes secured and unsecured loans. Issues may include real property related loans or loans related to automobiles or other personal property.
- CF11. Obtained other consumer benefit.

### **Disability Rights**

- D1. Obtained, preserved, or improved rights of institutionalized persons Includes access to disability services while institutionalized, statutory and constitutional rights while institutionalized, right to treatment in least restrictive setting, and release from institution.
- D2. Obtained, preserved or improved access to public facilities/accommodations Includes ADA claims and similar state statutory claims against place of public accommodation.
- D3. Obtained, preserved or improved access to government services/accommodations Includes ADA, Section 504 of the Rehabilitation Act of 1973 and similar state statutory claims against governmental entities.
- D4. Obtained, preserved or increased community residential & support services Includes access to appropriate community residential and support services including those to avoid placement in an institution; includes access to regional center services.
- D5. Obtained other benefits (or rights) for person with disabilities.

### **Education**

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

student has sufficient 504 and ADA accommodations when entering higher education; and obtained foster education-related benefits such as scholarships, loan forgiveness and other financial assistance to attend school.

- ED6. Obtained, increased, or improved other education-related benefits or rights Includes efforts to help students stay on track to graduate, removed barriers to graduation, obtained access to and clarified records, credit recovery or obtained graduation credits, including enforcing AB167 rights for partial credits and/or early graduation; obtained access to extra-curricular activities, interpreter and translation services; increased and improved access to transition services; advocated for foster children impacted by changes in foster home placements; protected the rights of students who are victims of bullying; includes obtained OCR-or CDE-ordered remedy of training for school staff on the rights of special education students; protected FAPE rights of special education students in juvenile detention; facilitated coordination between school staff and other service agencies, including working with the public defender's office.

## **Employment**

- E1. Obtained unpaid wages due Includes represented at administrative hearing and in litigation that resulted in recovery of lost wages due to underpayment or wage theft.
- E2. Overcame or obtained relief from job discrimination, harassment, and/or retaliation and/or other adverse employment action Includes represented and obtained court judgment around FEHA, ADA, Title VII, and other workplace protections that address discrimination, harassment, and retaliation. Also includes negotiated informally with employer to prevent further adverse action and ensured compliance with employment protections. Includes activities that resulted in monetary payment to client.
- E3. Improved employer's compliance with employment law and best practices Includes activities that resulted in workplace-wide change in practices and policies.
- E4. Overcame or obtained relief from health and safety violation Includes represented and obtained court judgment around state and federal OSHA protections. Also includes accomplished relief through Cal/OSHA fines, orders, or health and safety inspection.
- E5. Obtained, preserved, enforced worker's rights under collective bargaining when union not advocating for member Includes represented and obtained relief from the NLRB.
- E6. Removed disability-related barriers to employment Includes obtained reasonable accommodation to prevent someone from losing a job or helping someone keep a job, includes vocational rehabilitation services.
- E7. Obtained other benefits in employment matter Includes benefits not captured by other main benefits categories above, such as delayed discharge or prolonged health benefits; includes wrongful termination or employment-related tort claims outside of job discrimination, harassment, or retaliation.
- **Family/Domestic Violence**
- F1. Obtained or preserved custody of child(ren) Includes both legal and physical custody; "preserved" includes cases that resulted in client's custody being reduced but still maintained at some level.
- F2. Obtained, preserved, or increased visitation rights "Preserved" includes defending against an action to deny visitation to parent, even if the result is less visitation; includes actions to enforce visitation orders.

- F3. Obtained protection from abuse or neglect Includes order for supervised or restricted visitation of children, order to prevent child abduction, exclusive possession order, and non-California Law Enforcement Telecommunication System order (non-CLETS).
- F4. Obtained a divorce, separation, or annulment Includes assisted with negotiating settlement agreement.
- F5. Obtained, preserved, or increased child support “Preserved” includes cases that resulted in client receiving less support, but maintaining it at some level
- F6. Obtained, preserved, or increased household income and assets. Includes distribution of marital property, including retirement benefits, pension plans, health insurance or other benefits or debt
- F7. Obtained downward modification of child support
- F8. Established parentage for a child
- F9. Obtained other benefit in a family law matter Includes modified or enforced non-custody orders, and obtained other benefits such as test evaluations, appointment of minor’s counsel and other ancillary orders related to children.
- DV1. Obtained a temporary restraining order or reissuance of a TRO under the DVPA Do not count more than once.
- DV2. Obtained other services and benefits to protect from abuse or neglect Includes obtained accommodations or accessed rights in housing, workplace, education, and other remedies not included in the DVPA, such as statutory right to break lease in circumstance of domestic violence; obtained DV-related protections from job discrimination; obtained assistance with safety planning.
- DV3. Prevented issuance or Obtained Termination of Protective Order (Family) Includes avoided or reversed administrative finding of child abuse/neglect and termination of order pursuant to DVPA.
- DV4. Obtained a restraining order after-hearing or renewal order under the DVPA

### **Guardianship**

- G1. Obtained or preserved guardianship Includes cases where guardianship is granted, successor guardian is appointed, joint-guardian is appointed, request to terminate is denied.
- G2. Obtained, preserved or increased visitation rights Includes grandparent, parent, caregiver, or other visitation requests that are granted.
- G3. Prevented or ended guardianship Includes prevented creation of guardianship or termination of guardianship.
- G4. Obtained protection from abuse or neglect in a guardianship context Includes prevented visitation, including prevented visitation due to distress, even if there is no abuse or neglect.

### **Health and Long-term Care**

- HL1. Obtained or preserved eligibility under publicly funded health insurance Includes reduced MediCal share of cost, overcame denial of medical services, obtained HMO Services/Rights; programs include Medicare, Medicaid or MediCal, EPSDT, Child Health Disability Prevention Program (CHDP), Targeted Low-Income Children’s Program, California Children’s Services (CCS), county insurance programs such as county W&I 17,000 and local programs; IHSS benefits; Home

and Community Based Services Waiver Program (HCBS); government health insurance premium payment programs such Medicare Savings Program and OA-HIPP.

- HL2. Obtained or preserved coverage under private insurance Includes private insurance, employer-based insurance, and Covered California; includes private health insurance premium payment programs such as OA-HIPP.
- HL3. Increased access to health services Includes publicly funded programs, such as ADAP; includes both increased access to health services and other medical costs reduction programs or benefits.
- HL4. Obtained or preserved eligibility for long-term care services Includes publicly funded or private health insurance.
- HL5. Increased access to long-term care services Includes publicly funded or private health insurance.
- HL6. Obtained protection from abuse and neglect in a Health and Long-term Care context Includes protection from abuse and neglect in nursing home and other institutions and facilities.
- HL7. Obtained other benefit on a health matter Includes prevented premature hospital discharge; prevented inappropriate discharge (patient dumping); assured quality care.

## **Housing**

- HO1. Prevented loss of current housing; Kept client in a home; prevented eviction (eviction defense) or prevented foreclosure, including represented and/or advocated for client during the notice stage, i.e., before filing of unlawful detainer.
- HO2. Negotiated or facilitated move out to provide “soft landing” Includes negotiated settlements, asserted defenses and procedural rights, and delayed foreclosure to help client avoid homelessness and/or transition to replacement housing. Also includes represented and/or advocated for the client during the notice stage, i.e., before filing of unlawful detainer. Results achieved may include time to move out (with or without payment of rent during that time); waiver of rent due; return of security deposit; money provided to move out; relocation payments; and kept eviction from being entered into the public record.
- HO3. Obtained or preserved access to housing Includes obtained or maintained eligibility for all types of public, subsidized, deed restricted or other affordable housing units or housing vouchers.
- HO4. Prevented, ended, or obtained relief from unfair or illegal behavior, or otherwise enforced rights or obtained remedies related to housing Includes enforced fair housing laws, local law, regulations and rent ordinances through informal advocacy, formal administrative proceeding or filing affirmative lawsuits; includes prevented illegal rent increase, improper calculation of tenant’s income to determine rent and utility payment amounts, improper determination of household size and appropriate size unit etc. Also includes prevented unlawful discrimination; ended lockout; ensured return of security deposits and/or access to personal property; enforced DV survivor’s right to break a lease.
- HO5. Enforced rights to safe and habitable housing Includes enforced housing, health, and safety codes, prevented utility shut offs, obtained repairs or improved conditions.
- HO6. Obtained, preserved, enforced rights of a landlord over a tenant Includes assisted vulnerable landlords (low-income, elderly) with evicting a tenant or enforcing a lease provision.
- HO7. Obtained relief from foreclosure or property scam Includes delayed the impact of foreclosure to help client avoid homelessness and/or transition to replacement housing; includes obtained relief from rent skimming.

- HO8. Resolved property title dispute Includes quieted title, achieved partition, constructive trusts, or specific performance; resolved slander of title, adverse possession, boundary line or prescriptive easement issues.
- HO9. Obtained other housing benefit Includes obtained access to transitional housing or shelter.

### **Immigration**

- I1. Prevented deportation Includes EOIR (at IJ and BIA level), or before DHS/ICE or the Federal Courts that resulted in an order allowing the person to remain in the U.S. Underlying applications for relief that led to favorable resolution may include adjusted status, asylum, withholding, cancelled removal, NACARA, waiver applications and any other requests or motions that terminated removal proceedings or prevented the execution of any removal orders.
- I2. Obtained citizenship Includes naturalization matters or in derivative or acquired citizenship matters, which may also include certificates of citizenship or US passports.
- I3. Obtained asylum (withholding of removal, convention against torture) Includes administrative representation before USCIS leading to the acquisition of asylum as either a principal or a derivative. This includes asylum applications, nunc pro tunc asylum and refugee/asylee petitions for relatives and may include work done before the US Department of State or other U.S. Government agency, as necessary to acquire the approval and admission of the principal or the family member.
- I4. Obtained release from immigration custody Includes bond hearings before EOIR (at IJ and BIA level), or before DHS/ICE or the Federal Courts that resulted in an order allowing the person to be released from ICE custody.
- I5. Obtained lawful permanent residency Includes adjusted status, conditional permanent residency, consular processing, removal of conditions or SIJS relief; also includes obtained lawful permanent residency for derivative(s).
- I6. Obtained employment authorization Includes initial or renewal employment authorization documents from USCIS.
- I7. Obtained legal status or quasi-legal status Includes U Visa and T Visa petitions approved and obtained quasi-legal status of VAWA self-petitioner; includes DAPA and DACA; includes SIJS; Includes assistance to principals and qualifying family members in obtaining U Visa and T Visa status, and obtained quasi-legal status under TPS, or protection or deferred action as a VAWA self-petitioner; also includes acquired deferred action status under the DAPA and DACA programs.
- I8. Obtained other immigration benefit Includes obtained an AB60 driver's license for an undocumented person. Also includes obtained refugee travel documents and other documents necessary for travel and return to the US, such as advance parole documents.

### **Income Maintenance**

- IM1. Obtained, preserved, or increased foster care, Kin-GAP, or AAP (adoption assistance benefits) to which entitled Includes all financial benefits available to children through foster care including but not limited to: AFDC-FC, State Foster Care Funding, Approved Relative Caregiver Program (ARC), Kinship Guardianship Assistance (KinGAP), Adoption Assistance Program (AAP), Extended Foster Care (EFC) through AB12, and Supervised Independent Living Program (SILP).
- IM2. Obtained, preserved, or increased veterans or military benefits to which entitled
- IM3. Obtained, preserved, or increased disability or age-related benefit to which entitled Includes SSI/SSDI/SDI (including "PASS" Programs for Achieving Self-sufficiency and similar programs),

CAPI, black lung, civil service retirement or disability, workers compensation, and other retirement benefits. Also includes retroactive payments received under any of these benefit programs.

- IM4. Obtained, preserved, or increased benefits to relieve hunger Includes CalFresh and WIC. Also includes retroactive payments received under any of these benefit programs.
- IM5. Obtained, preserved, or increased benefits to help people maintain economic self-sufficiency Includes all benefits that are NOT included in the categories above, that help people maintain self-sufficiency and to stay in their own homes, such as general relief, CalWorks, unemployment benefits, and Homeless Assistance Benefits; also includes paid family leave, pensions, and other non-government related benefits.
- IM6. Obtained, preserved, or increased crime victim's compensation benefit
- IM7. Obtained, preserved, or increased other income maintenance benefits to which entitled Includes childcare and any other services not covered above. Includes other income benefits not covered above.

### **Juvenile**

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

### **Miscellaneous**

- M1. Preserved or strengthened nonprofit infrastructure or expanded its capacity Includes provided organizational and transactional support for nonprofit organizations serving income-eligible populations: obtained incorporation or dissolution; obtained tax exempt status; created corporate policies, negotiated transactions, drafted contracts, provided intellectual property,

employment law or other representation that enabled the organization to continue or expand its programs.

- M2. Empowered community to advocate on own behalf Includes developed the capacity of low-income community members to advocate on behalf of their community, whether represented a nonprofit organization or a community group. Could include educated about legal requirements for community input, assisted with understanding proposed laws or legislative actions.
- M3. Preserved or strengthened community through (other) community development Includes provided organizational and transactional support for micro-businesses and low-income entrepreneurs; completed a legal transaction to benefit a low-income community; increased job opportunities in low-income community; created access to services (e.g., childcare and credit unions); and other economic development activity. Also includes environmental justice matters, healthy living for low-income communities, equity in transit-oriented development and other matters in support of the protection and development of low-income communities.
- M4. Obtained, preserved, increased affordable housing Includes represented in transactions for affordable housing development; represented in anti-NIMBY efforts for affordable housing development; negotiated affordable housing policies in local jurisdiction planning; enforced state affordable housing laws.
- M5. Removed barriers that impact employment, benefits, housing and self-sufficiency Includes overcame the taking or restriction of drivers' or other license; expunged records; kept information off records; cleared ticket or warrant; and helped people with re-entry. Also includes obtained Certificates of Rehabilitation.
- M6. Obtained or increased tax benefit or prevented or reduced tax liability Includes obtained EITC, child tax credit and other tax benefits, resolved disputes or controversies with any taxing agency, negotiated compromise of tax amounts owed, and resolved tax liability or obtained tax refunds.
- M7. Obtained name change, birth certificate or gender change Includes obtained amendment to birth certificate, delayed registrations of birth, and obtained judicial or court order of fact of birth.
- M8. Obtained a living will, advance health care directive, health proxy and/or power of attorney
- M9. Obtained a will Includes assisted with probate matter or settled an estate.
- M10. Obtained, preserved or increased civil rights of indigent people Includes litigation or negotiation to protect rights of income-eligible populations.
- M11. Obtained, preserved, or increased Indian/Tribal rights of indigent people
- M12. Obtained, preserved, or increased prisoner rights
- M13. Avoided or reduced tort liability or judgment
- M14. Protected rights of victim in the criminal justice system Includes obtained protections for victims of crime in interactions with law enforcement agencies, such as police, prosecutors and victim-witness programs; and obtained legal rights including with respect to privacy, return of personal property held by law enforcement, and under Marsy's law.
- M15. Obtained protection from civil harassment and/or stalking Includes obtained a restraining order (temporary and/or after-hearing) to prevent civil harassment, including stalking; also includes other relief that can be requested as part of a civil harassment restraining order, such as relinquishment of firearms.

- M16. Obtained protection from elder or dependent adult abuse Includes obtained a restraining order (temporary and/or after-hearing) to prevent elder or dependent adult abuse, with or without move-out order; Includes defending an elder/dependent adult in a case brought against them, and obtaining assistance with safety planning.

### **Access to Justice (Optional)**

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

- AJ1. Accessed client's rights to the justice system Includes maintained privacy of records, obtained jurisdiction over a threshold issue; obtained standing for a client; prevented wrongful jurisdiction over an action; and, provided client representation in a court or administrative hearing which did not otherwise result in a measurable outcome.
- AJ2. Avoided need for litigation Includes discouraged client from filing a non-meritorious case; negotiated settlement without litigation and assisted client in finding alternate method of addressing the legal problem outside of the judicial system.
- AJ3. Set legal precedent Established case law that will affect a significant segment of the eligible population and that achieved relatively permanent improvement in the legal rights or basic conditions of those affected.
- AJ4. Clarified or changed policy of government agency or improved agency's provision of services or appeals processes Includes language access and quicker handling of claims.
- AJ5. Assisted client with finding an attorney to represent them. Includes helped a client tell their story so that they could get pro bono help or found a low bono attorney to take a meritorious case.