



The Giving Common

An Initiative of the Boston Foundation

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Veterans Legal Services, Inc.



VETERANS
LEGAL SERVICES



General Information

PO Box 8457
Boston, MA 02114
(857) 317-4474

Website

<http://www.veteranslegalservices.org>

Organization Contact

Sarah Roxburgh sarah@veteranslegalservices.org

Year of Incorporation

1994

Statements & Search Criteria

Mission Statement

Veterans Legal Services' mission is to promote self-sufficiency, stability, and financial security of homeless and low-income veterans through free and accessible legal services.

You may view a video about VLS's impact here: <https://www.youtube.com/watch?v=1Vcck5un85M>. This video was produced by Massachusetts Lawyers Weekly when it presented VLS with the 2018 Reginald Heber Smith Award for Excellence in Legal Services.

Background Statement

Veterans Legal Services ("VLS") is proud to have been the first legal services provider in Massachusetts to specialize in servicemembers' and veterans' issues. VLS was started in 1991 by law students who identified that homeless and at-risk veterans faced legal barriers to stability and were not being served by other legal aid organizations. They established a free walk-in legal clinic at the New England Center and Home for Veterans ("NECHV"). In 1994, VLS incorporated and obtained 501(c)(3) status. VLS has since expanded and, in addition to continuing its services at NECHV, now also provides services at the Chelsea Soldiers' Home, the Edith Nourse Rogers Memorial Veterans Hospital (Bedford VA Medical Center), the Norfolk County Veterans Treatment Court, Massachusetts Stand Down for Veterans, Yellow Ribbon events for deploying and returning troops, and various veterans' fairs and expos throughout Massachusetts. Providing services on-site makes VLS accessible for veterans and allows VLS to best collaborate with other supportive services providers, such as mental health, job training, and substance abuse counselors. This increases the likelihood of the veterans' successful transition to permanent housing, employment, and independence.

Today, VLS remains the only civil legal aid organization in Massachusetts whose sole mission is to serve veterans. VLS prioritizes those who would not otherwise receive legal services and where representation may yield a life-changing result that restores a veteran's self-sufficiency and dignity. VLS also prioritizes cases for the disabled, victims of domestic violence or military sexual trauma, and cases where there is a significant disparity in resources or the opposing party has representation. VLS provides assistance on approximately 700 veterans' cases per year.

Impact Statement

During fiscal year 2016-2017, VLS had the following accomplishments:

- (1) VLS secured key funding from the Colonel Ruby W. and Lavon P. Linn Foundation, the Cummings Foundation, the Klarman Family Foundation, the Massachusetts Attorney General's Office, Robert K. Kraft, and the Skadden Fellowship Foundation. This support enabled VLS to sustain and grow programs, increasing services from approximately 515 veterans' cases to 700 veterans' cases.
- (2) Made significant progress on a technology project, upgrading all hardware including laptops, tables for client intakes, cloud-based secure storage, and migration of all files on existing devices. This project was generously funded by the Richard and Susan Smith Family Foundation and substantially enhances organizational sustainability and lays the foundation for future growth.
- (3) Established an endowment with an initial investment of \$250,000 from the Colonel Ruby W. and Lavon P. Linn Foundation. Responded to this donor's matching challenge, raising \$165,000 toward the endowment.

For fiscal year 2017-2018, VLS's goals include:

- (1) Related to number three (3) above, respond to the Linn Foundation's matching challenge to raise the remaining \$85,000 by June 30, 2018. The endowment provides a financial foundation for VLS; the principal is permanently restricted and all income generated by the investment will be used to deliver services to veterans in need--both today and into the future.
- (2) Because much of VLS's funding comes from one-year grants, the VLS Board Members and the Co-Executive Director will be strategically focused on cultivation and stewardship of donor prospects to ensure that VLS has the necessary resources to sustain its growth in programs.
- (3) Working with the VLS Education Committee, chaired by Judge James McHugh, III (ret.), VLS will continue to develop informational and self-help programs and recordings for veterans which will be made available on VLS's website and other sources to reach even more veterans in need.
- (4) A review of all of VLS's clinics, done in consultation with the supervising attorneys at each of the clinic sites, key volunteers, and the Co-Executive Directors, with the goal of identifying ways in which the clinics may be improved for more impact. Possible improvements could relate to the physical space, the timing of the clinics, the frequency of the clinics, and procedures for screening for client eligibility.

Needs Statement

(1) Meeting the matching challenge of the Col. Ruby W. and Lavon P. Linn Foundation, as described above. The matching deadline is June 30, 2018 and, as of February 2018, VLS must raise an additional \$55,000 to maximize the opportunity.

(2) Because most of VLS's funding comes from one-year grants, VLS must focus on development activities including VLS's 2018 gala, likely to be held in November 2018. The gala is expected to raise over 25% of VLS's annual budget. The 2017-2018 fiscal year budget is \$800,000.

(3) VLS must invest in additional staff members. In particular, VLS is planning to retain or contract with a part-time bookkeeper and a full-time administrator. The volume of bookkeeping responsibilities has expanded in recent years, warranting retaining a person dedicated to this. In addition, VLS currently has one full-time support person (Paralegal/Office Manager) who handles numerous program and administrative tasks, including information technology needs. VLS's program growth necessitates an additional person to work under the Paralegal/Office Manager whom will be responsible for answering phones, screening veterans for eligibility, responding to inquiries for assistance, and entering and maintaining client and other records.

(4) As of February 2018, VLS is half way into a 5 year office lease. The office is approximately 1,700 square feet and houses 8 staff members and numerous interns and volunteers. As of September 2018, the staff will increase to 9 (exclusive of the bookkeeper described above), as VLS will be adding an Equal Justice Works fellow. By 2018-2019, the current space may hinder VLS's programs.

CEO/Executive Director Statement

Over the past seven years, we have been honored to lead VLS and turn it into a first-rate non-profit organization that is 100% committed to best practices as it works to fulfill its mission to serve our veterans. Our personal dedication to leading, growing, and improving VLS comes from our commitment to our veterans. Many of us know that servicemembers often face challenges in their transition to civilian life. However, unless one reviews statistics, such as those included in the VA CHALENG survey, it would not likely be known that legal services are a top need of our veterans. The lasting physical, mental, and financial impact of military service often results in legal problems that contribute to insecure housing situations, broken familial relationships, and strained finances. As attorneys, we feel we have a duty--and the capacity--to help. And we are proud to lead the only legal aid organization in Massachusetts whose mission is to serve veterans. We work every day to improve the organization at every level and to ensure that our veterans will have access to the professional legal services they need, both today and into the future. We are grateful to live and work in Greater Boston, where our community members rise up with us to respond to the needs of our veterans. Our most sincere thanks to those who support VLS's mission; without you our veterans, like Dave, a U.S. Navy veteran who is quoted below, would not have the services they need and have earned.

"VLS helped me big time--I don't think I could ever repay them...It saved my life because I had nowhere to go... I don't think I would have made it without VLS's help."

We look forward to connecting with you in service to our veterans.

-Sarah E. Roxburgh, Esq., Co-Executive Director & Chief of Operations

-Anna S. Richardson, Esq., Co-Executive Director & Chief Counsel

Board Chair Statement

Since becoming Chair of the VLS board in May 2016, I've been more impressed than ever by the accomplishments and the future of our organization. We have a dedicated and expert staff, led by Sarah and Anna; a growing corps of volunteer lawyers being organized by Lynn Girton; a reinvigorated roster of committees to focus on our priorities (more on that in a minute); several new members of our board who bring experience and talent to our mission; professional office space in downtown Boston; and sophisticated software that enables our staff and volunteers to do what they do better than anyone – assist, and advocate for, military veterans who have served our country and now need legal services to surmount difficulties in their post-military lives.

VLS is, as a matter of law, a charitable organization, but what we do is not charity. It is the repayment of an intangible and important debt to those who volunteered to go into harm's way to defend our country. Some of them have returned to face daunting difficulties. They need assistance, and VLS is able to provide it, with your help. We do that not as an act of charity but of obligation.

The most recent fiscal year was a financially successful one for VLS. Through the generosity of foundations, bar associations, and individual donors, our budget has increased from \$340,000 in 2015 to \$800,000 in 2018, and we were able to service 700 veterans' cases, up from 448 in 2015.

This is enormously encouraging, and this growth is enabling us to take on new initiatives. Let me sketch a few of those for you briefly. While individual representation and advice is and will remain at the core of our mission, we are placing new emphasis on systemic help to veterans. For example, last year we submitted Anna's expert commentary and informed recommendations on revisions to the judicial guidelines for child support, an issue faced by many of our clients. And we have created an Education Committee, led by retired Massachusetts Appeals Court judge Jim McHugh, a Navy veteran, to bring our message and raise awareness of the needs of veterans to judges and lawyers throughout the Commonwealth, and a Communications Committee under former Fidelity executives Jacqueline Fearer and Robin Orazem to reach out, with Jim's committee, to the public. We are also organizing to focus attention on the unique challenges faced by LGBTQ veterans and women veterans in post-military life.

We at VLS are energized by the prospect of executing an ambitious plan that will enable VLS to continue to make good on our obligation to those veterans who volunteered to serve and who now look to us to volunteer for them. It is an honor for us to be able to do that, and to have the generous support of those who are willing to support us, and them. We are deeply grateful to you, as we are to our veterans. You have our sincere thanks as we undertake to do more.

Allan A. Ryan, Esq.

Board Chair

Service Categories

Civil Rights, Social Action, & Advocacy N.E.C.

Centers to Support the Independence of Specific Populations

Geographic Areas Served

VLS services veterans' cases in the following five counties in Massachusetts:

Essex

Middlesex

Norfolk

Plymouth

Suffolk

Please review online profile for full list of selected areas served.

Programs

Veterans Program

Description

Veterans Legal Services ("VLS") promotes self-sufficiency, stability, and financial security for veterans through comprehensive and accessible legal services. VLS currently provides on-site legal services at the New England Center & Home for Veterans, the Chelsea Soldiers' Home, the Edith Nourse Rogers Memorial Veterans Hospital (Bedford VA Medical Center), the Norfolk County Veterans Treatment Court, and Massachusetts Veterans Stand Down. Through these sites, VLS services approximately 700 veterans' cases annually. The most common types of cases include: benefits (VA service-connected disability, Massachusetts c. 115 needs-based benefits, etc.); debt; elder law/estate planning (health care proxy, power of attorney, guardianship, etc.); family law (divorce, child support, custody, visitation); housing (landlord/tenant and subsidized housing eligibility); and military discharge upgrades.

By locating legal clinics at homeless shelters and community sites, VLS seamlessly collaborates with veterans supportive services providers, including mental health clinicians and substance abuse counselors. This program model offers holistic support to veterans, ensuring the best chance of veteran success. In the future, VLS hopes to expand these community partnerships to include other sites throughout the state, funding permitting.

Budget

800000

Category

Crime & Legal, General/Other Legal Services

Population Served

Veterans, People/Families with of People with Disabilities, Families

Program Short Term Success

Short-term, VLS defines success by:

- Number of legal clinics held
- Number of veterans served
- Percentage of veterans whose housing situation is stabilized or improved
- Percentage of veterans whose family situation is stabilized or improved
- Percentage of veterans whose financial situation is stabilized or improved
- Number of volunteer attorneys engaged
- Number of cases successfully referred to volunteer attorneys
- Financial health of the organization to sustain services

Program Long term Success

VLS envisions a world where no veteran remains or becomes homeless--or loses hope--due to a lack of civil legal representation. Long-term success for VLS includes:

- VLS's ability to provide services throughout the Commonwealth (we presently cover five counties around Greater Boston, with the majority of services provided in Suffolk and Middlesex counties)
- VLS's ability to serve a larger volume of veterans. VLS currently services approximately 700 veterans' cases per year, but it regularly has to turn veterans away due to lack of resources and often VLS may only be able to provide limited assistance on certain cases.
- VLS's accessibility to especially vulnerable veterans' populations, including women veterans who statistically are more likely to become homeless than their male counterparts and LGBTQ veterans who may have received negative discharge statuses under Don't Ask Don't Tell
- Doing more legal work at the appellate level, thereby impacting the veteran population overall through creation of positive legal precedent
- Quantity and quality of VLS's pro bono program, maximizing the skills and interest of the private bar in service to our veterans
- Consistent achievement of the best possible legal results for veterans that improves their quality of life
- VLS's financial health to support expanded programs

Program Success Monitored By

VLS currently monitors program success by:

- Veteran income at entrance and exit
- Veteran housing situation at entrance and exit
- Percentage of veterans who stabilize or increase their income (e.g., preserving an at-risk income source, securing a new source of income)
- Percentage of veterans who stabilize or improve their housing situation (e.g., preventing eviction)
- Percentage of veterans who stabilize or improve their family situation (e.g., reuniting with children)
- Case closure survey with the veteran
- Number of volunteer attorneys engaged
- Number of cases successfully referred to volunteer attorneys
- Case closure survey with the volunteer attorney, if any

Examples of Program Success

José, a U.S. Marine Corps veteran, came to the United States from the Dominican Republic when he was 8 years old. The U.S. was José's home, and he served honorably as a U.S. Marine. However, he still lacked the U.S. citizenship he desired and had earned. After facing many delays and obstacles on his path towards becoming a U.S. citizen, José could no longer afford his private lawyer, was seeing minimal progress on his case, and was terrified of what felt like an inevitable deportation. He recalls, "At the last minute, my lawyer was asking me for another 5k that I didn't even have... I was ready to sell my car." VLS Pro Bono Director, Lynn Girton, matched José with VLS volunteer attorney Mike Homer who worked diligently with the U.S. Department of Immigration and Customs Enforcement to secure José's citizenship. In José's own words, "I don't even know what would have become of me...As soon as I found out about VLS, they made it happen for me and it didn't cost me anything!" Shortly after obtaining citizenship, José was hired for a permanent position as supervisor on the Veterans Construction Team.

Dave, a U.S. Navy veteran, was being evicted from his home through no fault of his own. Dave had previously tried to obtain legal help, but as a disabled veteran on a fixed income, he could not afford an attorney. Then he found VLS. VLS matched Dave with a volunteer attorney. The attorney negotiated a settlement that allowed Dave the time and the means to purchase his own home. Today, Dave is doing well and enjoys taking care of his dog and volunteering in the community. In Dave's own words: " VLS helped me big time--I don't think I could ever repay them...It saved my life because I had nowhere to go...I don't think I would have made it without VLS's help."

Julie,* a U.S. Marine Corps veteran, wanted to be free from her abusive spouse but had avoided pursuing divorce for fear that her spouse would find her. She came to VLS for help. VLS represented Julie and worked with her throughout the process to ensure that her abuser could not locate her. Julie's divorce was recently finalized and she is rebuilding her life. In Julie's own words: "VLS changed my life and my future. The worst, most heavy thing I've had to carry was how to get rid of this person who destroyed me so badly. VLS helped me get this done and make sure that I'm not unsafe, not looking over my shoulder anymore."

*Name has been changed to protect privacy

John, a U.S. Air Force veteran, came to VLS because he owed back child support. His bank account had been frozen, so he could not use his modest income to pay rent and he had become homeless. He wanted to support his child, but because of the bank levy, he could not even support himself. When asked what would have happened if he had not found VLS, John said "I probably would have killed myself, in all seriousness. I was getting close...My wife took everything, and I had no help. I tried to get

help--I was at the end of my rope. I was in the homeless shelter. It was a tough place to be...Now I can pay my rent for a room, and I now have money for food. VLS is a blessing. It really is."

Program Comments

CEO Comments

VLS has achieved significant growth and success in recent years. This success was due in part to VLS's participation as a 2014 Social Innovator. A summary of VLS's participation with the Social Innovation Forum is available here: <http://www.socialinnovationforum.org/profile/veterans-legal-services>. In recent years, VLS has achieved the following:

- Selected by Massachusetts Lawyers Weekly for the 2018 Reginald Heber Smith Award for Excellent in Legal Services; view video here: <https://www.youtube.com/watch?v=1Vcck5un85M>
- Completed a professional strategic plan update in winter 2016
- Continued to strengthen Board of Directors and enhance Board diversity
- Increased # of veterans served from less than 300 in 2013-2014 to approximately 700 in 2016-2017
- Grown staff from 2 employees in 2010 to 7 employees in 2017
- Grown volunteer program from approximately 30 in 2013 to 200 in 2017
- Grown budget from approximately \$250,000 in 2014 to \$800,000 in 2017-2018
- Overhauled office software and hardware to improve efficiency and lay the foundation to further build capacity
- Received significant support from:
 - Albert R. Broccoli & Dana Broccoli Foundation
 - Boston Bar Foundation
 - Boston Red Sox
 - Cramer
 - Cummings Foundation
 - Eastern Bank Charitable Foundation
 - Fenway Sports Management
 - Highland Street Foundation
 - Klarman Family Foundation
 - Massachusetts Attorney General's Office
 - Massachusetts Bar Foundation
 - Mifflin Memorial Fund
 - Private Family Foundation
 - Richard & Susan Smith Family Foundation
 - Robert K. Kraft
 - Ruby W. and Lavon P. Linn Foundation
 - Shipley Foundation
 - Skadden Fellowship Foundation
 - Theodore Edson Parker Foundation

Management

CEO/Executive Director

Executive Director

Ms. Sarah Ellen Roxburgh Esq.

Term Start

Sept 2008

Email

Sarah@veteranslegalservices.org

Experience

Sarah Roxburgh directs Veterans Legal Services's (VLS) operations. She has served in that role since 2010. Prior to that, she was a staff attorney at the organization. Sarah specializes in raising the necessary resources to build capacity, recruiting and retaining volunteer law students and attorneys, managing and growing the VLS board of directors, committees, and staff, and developing and implementing systems to scale with VLS's growth.

Sarah received her B.A. from Northeastern University and her J.D. from New England Law | Boston. Upon graduation, she received the New England Law | Boston Dean Timothy J. Cronin, Jr. Memorial Award for the graduate with the most outstanding contribution to public service. Sarah lives in Boston with her dog, Wally (Airedale/Welsh Terrier mix), and is a dedicated yogi. She and her prior dog, Herman, have volunteered with Boston Children's Hospital through their therapy dog visitation program. Sarah also volunteers with Christopher's Haven, an organization providing temporary housing and support for families whose minor children are receiving cancer treatment in Boston.

Co-CEO

Co-CEO

Ms. Anna Schleelein Richardson Esq.

Term Start

Aug 2008

Email

Anna@veteranslegalservices.org

Experience

Anna Richardson leads VLS programs and is widely known for her expertise in veterans' legal needs. She has served as faculty for the Massachusetts Law Reform Institute Basic Benefits Training offered by Massachusetts Continuing Legal Education on state and federal veterans' benefits. She has also performed trainings on veterans' legal issues for the Boston Bar Association, the Legal Advocacy and Resource Center, and legal services agencies.

Anna received her B.A. from Boston College and her J.D. from Boston University School of Law. In 2011, Anna received Boston University School of Law's Victor J. Garo Public Service Award, presented annually to two alumni for their commitment and dedication to public service. In 2015, she was selected as a Boston Rising Star by the National Law Journal and Connecticut Law Tribune. Anna is an avid gardener and lives in Waltham with her husband, Clarence.

Senior Staff

Ms. Lynn Girton Esq.

Title

Pro Bono Director

Experience/Biography

Lynn Girton has devoted her entire legal career of over thirty years to access to justice for low-income individuals. Before joining VLS, Lynn served as Chief Counsel at Volunteer Lawyers Project for 19 years, overseeing the legal work of its staff and pro bono attorneys. Prior to that, she was the Senior Managing Attorney of the Employment Unit of Greater Boston Legal Services. Lynn has practiced in the fields of family and landlord/tenant law, as well as employment, unemployment insurance, and civil rights. She received the 1998 Massachusetts Bar Association Pro Bono and Access to Justice Award; the Women of Justice Award given by the Massachusetts Lawyers Weekly in 2009; the John Minor Wisdom Public Service and Professionalism Award given by the ABA Section of Litigation in May of 2009; and the John G. Brooks Legal Services Award presented by the BBA in September of 2012. Lynn is also a prior co-chair of the Boston Bar Association's Military and Veterans Committee. She is an expert in leveraging the talent and pro bono resources of volunteer lawyers to maximize results for those who would otherwise go without the legal help they need. Lynn lives in West Roxbury with her wife, Patricia, and their two rescue dogs, Sammy and Bella.

Staff Information

Full Time Staff	6
Part Time Staff	2
Volunteers	200
Contractors	0
Retention Rate	100%

Staff Demographics - Ethnicity

African American/Black	0
Asian American/Pacific Islander	1
Caucasian	6
Hispanic/Latino	1
Native American/American Indian	0
Other	0 0

Staff Demographics - Gender

Male	1
Female	7
Unspecified	0

Formal Evaluations

CEO Formal Evaluation	Yes
CEO/Executive Formal Evaluation Frequency	Annually
Senior Management Formal Evaluation	Yes
Senior Management Formal Evaluation Frequency	Annually
NonManagement Formal Evaluation	Yes
Non Management Formal Evaluation Frequency	Annually

Plans & Policies

Organization has a Fundraising Plan?	No
Organization has a Strategic Plan?	Yes
Years Strategic Plan Considers	1
Date Strategic Plan Adopted	Nov 2015
Does your organization have a Business Continuity of Operations Plan?	No
Management Succession Plan?	No
Organization Policy and Procedures	Yes
Nondiscrimination Policy	Yes
Whistleblower Policy	Yes
Document Destruction Policy	Yes
Directors and Officers Insurance Policy	Yes
Is your organization licensed by the Government?	No
Registration	Yes
Permit?	Yes

Risk Management Provisions

Commercial General Liability
Disability Insurance
Workers Compensation and Employers' Liability
Directors and Officers Policy
Medical Health Insurance
Professional Liability

Collaborations

1. VLS works closely with the Boston Bar Association ("BBA") on its programs for and related to military and veterans. The BBA's Active Duty Military & Veterans Forum is co-chaired by VLS Board Member, Jonathan Hayden, Esq., and VLS Staff Attorney, Jessica Youngberg. The Forum spotlights the needs of active duty military personnel, reservists, and veterans within and outside of the legal profession. The forum's volunteer members facilitate connections between those facing legal issues and legal services providers. The Forum also serves as a network for

servicemembers and veterans who are attorneys themselves and care deeply about expanding access to justice for this vulnerable population.

2. VLS participates in the Greater Boston Veterans Collaborative, which encourages community, building strategic coalition, and fostering a data-driven understanding of the needs of local veterans.
3. VLS collaborates with each of its host sites and the staff of those sites: New England Center & Home for Veterans, Chelsea Soldiers' Home, Norfolk County Veterans Treatment Court, and the Edith Nourse Rogers Memorial Veterans Hospital (Bedford VA Medical Center).
4. VLS collaborates with numerous supportive services providers for veterans, such as Home Base, to offer holistic support to our veterans.

Awards

Awards

Award/Recognition	Organization	Year
Reginald Heber Smith Excellence in Legal Services Award	Massachusetts Lawyers Weekly	2018
Margaret Stewart Lindsay Inspiration Award	Margaret Stewart Lindsay Foundation	2015

Affiliations

Affiliation	Year
Massachusetts Nonprofit Network	2018
Associated Grant Makers	2018
Massachusetts Housing and Shelter Alliance (MHSA)	2018

Comments

CEO Comments

VLS's Board of Directors is made up of 13 men and women, 8 of whom are veterans, who are committed to ensuring that Greater Boston is responsive to its veterans' needs. The Board is engaged, effective, and informed. Many of the Board's members have volunteered at VLS's legal clinics or at the VLS main office, witnessing VLS's staff and volunteers in action.

Board & Governance

Board Chair

Board Chair	Mr. Allan Ryan Esq.
Company Affiliation	Harvard Business School Publishing
Term	May 2016 to 0
Email	ryan@hbsp.harvard.edu

Board Members

Name	Affiliation	Status
Rosemary Allen Esq.	Mintz Levin (Retired)	Voting
Jacqueline Fearer	Fidelity Investments	Voting
Jennifer Glanville	Boston Beer Company	Voting
Jonathan C. Hayden Esq.	Rackemann, Sawyer & Brewster	Voting
Joseph Kearns Goodwin Esq.	National Service Now	Voting
Kristen Kuliga Esq.	KSport & Entertainment	Voting
Daniel LaPenta Esq.	Santander	Voting
Hon. James McHugh III	Massachusetts Appeals Court (Retired)	Voting
Timothy McLaughlin Esq.	Shaheen & Gordon, P.A.	Voting
Robin Orazem	Fidelity (Retired)	Voting
Allan Ryan Esq.	Harvard Business School Publishing	Voting
Andrew von Kuhn	Student, Harvard Business School	Voting
James. P. Whitters, III Esq.	Alkalol	Voting

Board Demographics - Ethnicity

African American/Black	0
Asian American/Pacific Islander	0
Caucasian	13
Hispanic/Latino	0
Native American/American Indian	0
Other	0 0

Board Demographics - Gender

Male	8
Female	5
Unspecified	0

Board Information

Board Term Lengths	3
Number of Full Board Meetings Annually	6
Written Board Selection Criteria?	Yes
Written Conflict of Interest Policy?	Yes
Percentage Making Monetary Contributions	100%
Percentage Making In-Kind Contributions	100%
Constituency Includes Client Representation	No

Standing Committees

Communications / Promotion / Publicity / Public Relations
 Compensation
 Development / Fund Development / Fund Raising / Grant Writing / Major Gifts
 Education
 Endowment
 Executive
 Finance
 Governance and Nominating
 Special Events (Golf Tournament, Walk / Run, Silent Auction, Dinner / Gala)
 N/A

Additional Board Members and Affiliations

<u>Name</u>	<u>Affiliation</u>
Richard Allen Esq.	Casner & Edwards (ret.); MA Attorney General Public Charities Division (former)
Michael Douvadjian	The Douvadjian Group, UBS
Doris Kearns Goodwin	
Scott Harshbarger	Casner & Edwards; former MA Attorney General
Michael B. Keating Esq.	Foley Hoag
Coleman Nee	Triangle, Inc.; Secretary of MA Veterans Services (former)
Steve Oleskey Esq.	Barclay Damon
Stephen Pagliuca	Bain Capital; Boston Celtics
John J. Regan Esq.	WilmerHale
William F. Sinnott Esq.	Barrett & Singal

Comments

CEO Comments

The individuals listed in the Advisory Board category are called "Friends of VLS." Friends of VLS is a group of distinguished individuals invited by the VLS Board of Directors to be affiliated with the organization due to their special knowledge of veterans' issues, legal services, philanthropy, and non-profit organizations.

Impact

Goals

VLS's goal is to ensure that no military veteran is homeless or without hope because of a lack of legal representation. VLS defines success by the number of veterans it assists with removing legal barriers to stability, self-sufficiency, and healthy families. VLS measures this success by the number of clients who transition from homelessness and high risk situations to independent living and stability.

Strategies

In order to reach those veterans most in need, VLS provides legal services on-site at area homeless shelters, VA facilities, and other community sites. This allows the organization to reach veterans where they are already receiving other services like case management or a hot meal. While on-site, VLS is able to provide on-the-spot counseling and advice on emergent legal issues, while also conducting intake and case assessment. VLS staff then assesses the cases and determines which cases to accept for further representation, which may include accompanying the veteran to court and representing him or her in all stages of the case.

Capabilities

VLS is able to represent a large number of veterans on a relatively small budget because the organization leverages the resources of volunteer law students and volunteer attorneys who assist with all aspects of client representation from intake and case assessment to appearing in court. As the only legal aid organization in Massachusetts whose sole mission is to serve veterans and a 27-year history, VLS has unique expertise in this area. VLS staff is frequently asked to train other lawyers and advocates on the legal issues unique to veterans. Finally, VLS's community partnerships with the New England Center and Home for Veterans, Chelsea Soldiers' Home, Norfolk County Veterans Treatment Court, the Edith Nourse Rogers Memorial Veterans Hospital (Bedford VA Medical Center), all six Boston area law schools, and area law firms enhance the organization's ability to meet the critical need of our veterans.

Indicators

Effectiveness is measured through number of cases opened and clients served; results; resources expended; client income and housing situation at entrance and exit; numbers of volunteers recruited, trained, and retained; and number of volunteers utilized. Effectiveness is also measured by the impact of appellate level cases on our client population, which have historically not received this level of advocacy.

VLS maintains a case management database to track clients served and results achieved, including categorizing whether the outcome is favorable, neutral, or unfavorable. VLS also measures client income and housing at entrance and exit, to measure financial security and housing stability. VLS tracks the percentage of clients whose housing, family, or economic situation stabilizes or improves when VLS provides them with assistance in the relevant subject area.

VLS will use trends in the data collected to determine whether the methods of service or outreach are reaching and positively impacting the greatest possible number of veterans in need or whether and how they need to be updated so VLS may better serve the veteran population and meet its objectives.

Progress

VLS is currently working to build capacity through enhancement of its volunteer attorney program so that it may serve more veterans in need, while ensuring organizational sustainability. VLS retained attorney Lynn Girton as its Pro Bono Director in September 2015, and she has since grown VLS's volunteer panel from 40 to approximately 200.

However, the need continues to outpace capacity. There is often a wait-list at VLS's clinic at the Bedford VA Medical Center, and requests for assistance come in from throughout the Commonwealth, including areas outside the organization's current geographic service area of Greater Boston. To better meet veterans' needs, VLS hopes to continue to sustainably grow programs.

Financials

Fiscal Year

Fiscal Year Start	Sept 01, 2017
Fiscal Year End	Aug 31, 2018
Projected Revenue	\$700,000.00
Projected Expenses	\$800,000.00
Endowment?	Yes
Endowment Value	\$566297.00
Spending Policy	Income Only
Credit Line?	No
Reserve Fund?	No
Months Reserve Fund Covers	0

Detailed Financials

Revenue and Expenses

Fiscal Year	2016	2015	2014
Total Revenue	\$879,013	\$409,619	\$285,575
Total Expenses	\$530,857	\$267,705	\$237,623

Revenue Sources

Fiscal Year	2016	2015	2014
Foundation and Corporation Contributions	--	--	--
Government Contributions	\$48,588	\$62,906	\$52,801
Federal	--	--	--
State	--	--	--
Local	--	--	--
Unspecified	\$48,588	\$62,906	\$52,801
Individual Contributions	\$571,881	\$241,467	\$205,955
Indirect Public Support	\$0	\$0	\$0
Earned Revenue	\$0	\$0	\$0
Investment Income, Net of Losses	\$1,284	\$333	\$186
Membership Dues	\$0	\$0	\$0
Special Events	\$257,260	\$104,913	\$26,633
Revenue In-Kind	--	--	--
Other	\$0	\$0	\$0

Expense Allocation

Fiscal Year	2016	2015	2014
Program Expense	\$440,827	\$215,929	\$193,487
Administration Expense	\$63,304	\$40,367	\$34,165
Fundraising Expense	\$26,726	\$11,409	\$9,971
Payments to Affiliates	--	--	--
Total Revenue/Total Expenses	1.66	1.53	1.20
Program Expense/Total Expenses	83%	81%	81%
Fundraising Expense/Contributed Revenue	3%	3%	3%

Assets and Liabilities

Fiscal Year	2016	2015	2014
Total Assets	\$667,455	\$226,663	\$101,847
Current Assets	\$642,920	\$183,132	\$50,555
Long-Term Liabilities	\$0	\$0	\$0
Current Liabilities	\$18,720	\$0	\$0
Total Net Assets	\$648,735	\$226,663	\$101,847

Short Term Solvency

Fiscal Year	2016	2015	2014
Current Ratio: Current Assets/Current Liabilities	34.34	--	--

Long Term Solvency

Fiscal Year	2016	2015	2014
Long-Term Liabilities/Total Assets	0%	0%	0%

Top Funding Sources

Fiscal Year	2016	2015	2014
Top Funding Source & Dollar Amount	--	--	--
Second Highest Funding Source & Dollar Amount	--	--	--
Third Highest Funding Source & Dollar Amount	--	--	--

Capital Campaign

Currently in a Capital Campaign? Yes

Campaign Purpose

In 2016, the Ruby W. and Lavon P. Linn Foundation contributed \$250,000 to VLS to establish the Colonel Ruby W. Linn Endowment. The Linn Foundation will also match funds VLS raises toward the endowment, up to \$250,000, through June 30, 2018. As of February 14, 2018, VLS has only approximately \$55,000 left to raise to maximize this opportunity.

Goal \$250000.00

Dates July 2017 to June 2018

Amount Raised To Date \$195000.00 as of Feb 2018

Capital Campaign Anticipated in Next 5 Years? Yes

Comments

CEO Comments

For FYE Aug 2016 and forward, VLS is completing a full audit performed by an independent accountant.

Foundation Staff Comments

Financial summary data in the charts and graphs above are per the organization's IRS Form 990s. Contributions from foundations and corporations are listed under individuals when the breakout was not available.