



# The Giving Common

An Initiative of the Boston Foundation

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Veterans Legal Services, Inc.

Current

## General Information

PO Box 8457  
Boston, MA 02114  
(857) 3174474

**Website**

<http://www.veteranslegalservices.org>

**Organization Contact**

Sarah Roxburgh [sarah@veteranslegalservices.org](mailto: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.

## **Background Statement**

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 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 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 over 500 veterans' cases per year.

**Impact Statement**

Veterans Legal Services (VLS) is proud to have been awarded a \$100K for 100 grant from the Cummings Foundation and a two-year challenge grant from Robert K. Kraft in fall 2015, which funded the retention of a Pro Bono Director with 30 years of experience in the field. Since starting with the organization, the VLS Pro Bono Director has helped grow the list of volunteer attorneys from 40 to more than 140.

VLS also retained its first Skadden Fellow to work with the organization as a staff attorney for two years at no cost to VLS. VLS recently retained a second Skadden Fellow, whose fellowship will begin in September 2017. VLS has also retained a full time Paralegal & Office Manager who assists with case management, fundraising/development, and administrative tasks.

The additional staff has allowed VLS to expand services to include legal clinics at the Bedford VAMC and the Norfolk County Veterans Treatment Court, in addition to continuing its clinics at the New England Center and Home for Veterans, the Chelsea Soldiers' Home, Massachusetts Veterans Stand Down, yellow ribbon events for deploying and returning troops, and various veterans' fairs and expos throughout Massachusetts as needed. The organization now provides assistance on more than 500 veterans' cases annually, addressing a variety of legal issues, and is on track to provide assistance on more than 550 veterans' cases in the fiscal year ending in August 2017. VLS has successfully diversified its funding sources for sustainability in a difficult economy.

Goals for the coming year include the execution of a major capital campaign that will significantly increase the long-term sustainability of the organization, and the enhancement of existing client services.

**Needs Statement**

Our primary need is for funding that will sustain responsible growth of our staff so that we can assist more veterans and their families with resolving legal issues that pose a barrier to self-sufficiency. Specifically, VLS is seeking to retain an experienced staff attorney to fill the role of its current Skadden Fellow, whose fellowship ends in September 2017, and who currently maintains a case load of approximately 75 cases and who supervises VLS's walk-in legal clinics at the New England Center and Home for Veterans and the Chelsea Soldiers' Home. The retention of an experienced staff attorney will enable VLS to continue to expand services to meet the growing and critical need for civil legal services for homeless and low-income veterans in the greater Boston area. VLS is also in need of a part-time development specialist to assist with the growing fundraising needs of the organization.

**CEO/Executive Director Statement**

Over the past two years, VLS has welcomed the newest members of its team, Lynn Girton, Esq., who joined us as Pro Bono Director, Jessica Hopton Youngberg, Esq., who joined us as a Skadden Fellow and staff attorney, Hannah Taylor, who joined us as Paralegal & Office Manager, together with Access to Justice Fellows, retired judges John Cratsley and Paul Chernoff, and dozens of new volunteers. The addition of new staff and volunteers will allow VLS to continue to meet the growing need for services in the veteran community. We continue to strive to provide the most effective, accessible legal services to veterans in need today, and to ensure that Veterans Legal Services is here to meet the needs of our clients in the years to come. In 2016, VLS completed an updated professional strategic plan to ensure we continue to meet those goals, but we cannot do it without your essential, sustaining support.

VLS was started because other organizations were not meeting the legal needs of our servicemembers and veterans. Twenty-six years later, we are still the primary provider of legal services to veterans in the Greater Boston Area. We cannot do it alone. Your support enables us to stand up for veterans dealing with financial, family, and disability issues which too often result from the stresses of military service. Will you make sure they are accounted for? Please join us in fulfilling our mission by visiting [veteranslegalservices.org](http://veteranslegalservices.org) and supporting VLS today.

***Sarah E. Roxburgh, Esq. & Anna Schleelein Richardson, Esq.***

***Co-Executive Directors***

## **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; and, as many of you have seen, professional office space in downtown 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 \$550,000 in 2016, and we were able to service 516 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, in June 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 vice-president 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 women veterans in post-military life.

We at VLS are energized by the prospect of executing an ambitious development 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 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 serves the following 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 promotes self-sufficiency, stability, and financial security for veterans and the homeless through comprehensive and accessible legal services. Through our Veterans Program, we currently offer on-site legal services on a walk-in basis at the New England Center and Home for Veterans, the Chelsea Soldiers' Home, the Bedford VA Medical Center, the Norfolk County Veterans Treatment Court, and Massachusetts Veterans Stand Down. In the future, we hope to expand these community partnerships to include other sites, such as additional VA hospitals, funding permitting.

By locating legal clinics at homeless shelters and service centers, Veterans Legal Services reaches underserved and neglected members of our society who are often reluctant to seek legal help.

### **Budget**

665859

### **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 the number of clinics held and veterans served, which may include counseling and advising a veteran on how best to handle an upcoming court date, to attending court and representing the veteran, to referring veterans with non-legal issues to more appropriate sources of assistance.

### **Program Long term Success**

VLS's ultimate goal is to assist veterans with achieving stability, economic security, and healthy families. We do this through removing legal barriers. Because VLS we assist with a variety of legal problems, and each veteran's circumstances differ, success for each veteran is unique.

### **Program Success Monitored By**

VLS currently measures client income, housing, and family situation at entry and exit. Success is measured by the number of clients who stabilize or increase their income (e.g., securing a source of income), stabilize or improve their housing situation (e.g., preventing eviction), or stabilize or improve their family situation (e.g., reuniting with children).

## **Examples of Program Success**

William, a U.S. Marine Corps veteran, came to Veterans Legal Services because he and his family were being evicted from their home in retaliation for reporting that the furnace was broken. William was especially worried about what would happen to his three young children if they were evicted.

Veterans Legal Services Pro Bono Director, Lynn Girton, matched William with a VLS volunteer attorney to defend him in the eviction proceedings. The volunteer attorney negotiated a settlement that allowed William and his family to remain in the home long enough for them to find alternative housing. All back rent was forgiven and the landlord was required to reimburse William and his family for over \$1,000 in electric bills.

With the extra time William was provided to find new housing, he obtained a VA loan and purchased a home. He and his family moved into their new home and are doing well.

In William's own words: "Everyone from VLS has been awesome ... A whole weight fell off my back. It's been amazing. I never thought, at 54, that I'd be owning my own home."

## Program Comments

### **CEO Comments**

VLS completed an update to its professional strategic plan in November 2015. This process was incredibly valuable, and implementation has been both a tremendous opportunity and a challenge. As we work to sustainably grow the organization, we have ambitious goals for fundraising, development of VLS's volunteer attorney program, and growth of client services.



# Management

## CEO/Executive Director

**Executive Director**

Ms. Sarah E. Roxburgh Esq.

**Term Start**

Sept 2008

**Email**

Sarah.Roxburgh@veteranslegalservices.org

### **Experience**

Sarah Roxburgh directs VLS's 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.

## 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. In October, 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.

Anna received her B.A. from Boston College and her J.D. from Boston University School of Law. Upon graduation, Anna received the law school's Warren S. Gilford Law and Humanity Prize for her commitment to public service.

## Staff Information

**Full Time Staff**

5

**Part Time Staff**

1

**Volunteers**

175

**Contractors**

0

**Retention Rate**

100%

## Staff Demographics - Ethnicity

**African American/Black**

0

<b>Asian American/Pacific Islander</b>	1
<b>Caucasian</b>	5
<b>Hispanic/Latino</b>	0
<b>Native American/American Indian</b>	0
<b>Other</b>	0 0

### Staff Demographics - Gender

<b>Male</b>	0
<b>Female</b>	6
<b>Unspecified</b>	0

### Formal Evaluations

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

### Plans & Policies

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

### Comments

**CEO Comments**

VLS's Board of Directors is made up of 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, witnessing VLS's staff and volunteers in action.

# Board & Governance

## Board Chair

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

## Board Members

<b>Name</b>	<b>Affiliation</b>	<b>Status</b>
Rosemary Allen Esq.	Mintz Levin (Retired)	Voting
Jennifer Glanville	Boston Beer Company	Voting
Jonathan C. Hayden Esq.	Rackemann, Sawyer & Brewster	Voting
Joseph Kearns Goodwin Esq.	National Service Now	Voting
Jordan Krasnow Esq.	Goulston & Storrs	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
Lily Robles	Opus Design	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

<b>African American/Black</b>	0
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	13
<b>Hispanic/Latino</b>	1
<b>Native American/American Indian</b>	0
<b>Other</b>	0 0

## Board Demographics - Gender

<b>Male</b>	9
<b>Female</b>	5
<b>Unspecified</b>	0

## Board Information

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

## Standing Committees

Executive  
Development / Fund Development / Fund Raising / Grant Writing / Major Gifts  
Communications / Promotion / Publicity / Public Relations  
Compensation  
Education  
Endowment  
Governance and Nominating  
Audit, Compliance and Controls

## Comments

### **CEO Comments**

# 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 how many of its clients 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 and service centers. 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 full representation, including 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 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 mission is to serve veterans, 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, all six Boston area law schools, and various 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 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 can 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 attorney panel from 40 attorneys to more than 150.

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 expand services substantially and is actively seeking funds to begin a second medical-legal partnership with the Brockton VA Medical Center, which would allow VLS to serve more veterans in need located south of Boston.

# Financials

## Fiscal Year

<b>Fiscal Year Start</b>	Sept 01, 2016
<b>Fiscal Year End</b>	Aug 31, 2017
<b>Projected Revenue</b>	\$740,832.00
<b>Projected Expenses</b>	\$665,859.00
<b>Endowment?</b>	Yes
<b>Endowment Value</b>	\$310280.00
<b>Spending Policy</b>	Income Only
<b>Credit Line?</b>	No
<b>Reserve Fund?</b>	No
<b>Months Reserve Fund Covers</b>	0

## Detailed Financials

### **Revenue and Expenses**

<b>Fiscal Year</b>	<b>2015</b>	<b>2014</b>	<b>2013</b>
<b>Total Revenue</b>	\$409,619	\$285,575	\$322,259
<b>Total Expenses</b>	\$267,705	\$237,623	\$249,246

### **Revenue Sources**

<b>Fiscal Year</b>	<b>2015</b>	<b>2014</b>	<b>2013</b>
<b>Foundation and Corporation Contributions</b>	--	--	\$115,200
<b>Government Contributions</b>	\$62,906	\$52,801	\$52,951
<b>Federal</b>	--	--	\$52,951
<b>State</b>	--	--	--
<b>Local</b>	--	--	--
<b>Unspecified</b>	\$62,906	\$52,801	--
<b>Individual Contributions</b>	\$241,467	\$205,955	\$109,799
<b>Indirect Public Support</b>	\$0	\$0	--
<b>Earned Revenue</b>	\$0	\$0	--
<b>Investment Income, Net of Losses</b>	\$333	\$186	\$214
<b>Membership Dues</b>	\$0	\$0	--
<b>Special Events</b>	\$104,913	\$26,633	\$44,095
<b>Revenue In-Kind</b>	--	--	--
<b>Other</b>	\$0	\$0	--



### Expense Allocation

Fiscal Year	2015	2014	2013
Program Expense	\$215,929	\$193,487	\$195,049
Administration Expense	\$40,367	\$34,165	\$44,035
Fundraising Expense	\$11,409	\$9,971	\$10,162
Payments to Affiliates	--	--	--
Total Revenue/Total Expenses	1.53	1.20	1.29
Program Expense/Total Expenses	81%	81%	78%
Fundraising Expense/Contributed Revenue	3%	3%	3%

### Assets and Liabilities

Fiscal Year	2015	2014	2013
Total Assets	\$226,663	\$101,847	\$200,936
Current Assets	\$183,132	\$50,555	\$77,603
Long-Term Liabilities	\$0	\$0	\$0
Current Liabilities	\$0	\$0	\$0
Total Net Assets	\$226,663	\$101,847	\$200,936

### Short Term Solvency

Fiscal Year	2015	2014	2013
Current Ratio: Current Assets/Current Liabilities	--	--	--

### Long Term Solvency

Fiscal Year	2015	2014	2013
Long-Term Liabilities/Total Assets	0%	0%	0%

### Top Funding Sources

Fiscal Year	2015	2014	2013
Top Funding Source & Dollar Amount	--	--	--
Second Highest Funding Source & Dollar Amount	--	--	--
Third Highest Funding Source & Dollar Amount	--	--	--

### Capital Campaign

Currently in a Capital Campaign?	No
Capital Campaign Anticipated in Next 5 Years?	Yes

### Comments

#### 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.