

PRO BONO PARTNERSHIP

2022-2023



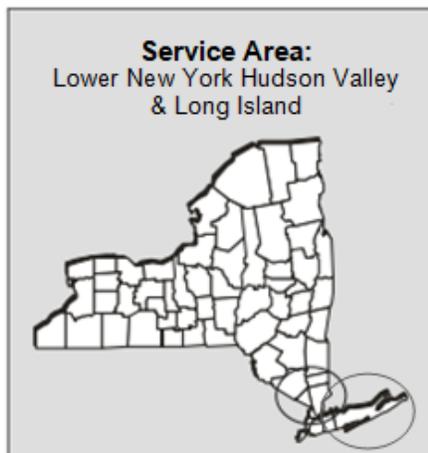
OVERVIEW OF ACHIEVEMENTS

Number of people and organizations benefited from your services: During the grant period, we assisted 292 New York nonprofit organizations on direct legal matters, answered Legal Resource Helpline queries from at least 152 New York nonprofits, and recruited and supported 710 legal volunteers. We also offered 39 education programs, many of which were held in collaboration with other community organizations; these were attended by 2,138 people.

The primary target population: The target population for this grant consists of New York 501(c)(3) nonprofit organizations and groups wishing to incorporate as 501(c)(3) nonprofits, particularly in the main geographic regions we serve: the Lower Hudson Valley (Westchester, Orange, Rockland, and Putnam Counties) and Long Island (Nassau and Suffolk Counties). During the reporting period, we also served clients in other parts of New York State, including several in Dutchess and Ulster Counties as well as in Albany, Columbia, Delaware, Essex, Monroe, Ontario, Saratoga, Schenectady, Sullivan, and Tompkins Counties.

Nonprofits in the target population can apply to become clients of the Partnership if they serve disadvantaged, underserved, or historically marginalized populations and/or provide services that enhance the quality of life in their communities; have legal needs that we can address; and are unable to pay for legal fees without substantially impacting program resources. Our Legal Resource Helpline and education programs (including workshops, webinars, Legal Alerts, and website resources) are available to anyone, regardless of whether they are affiliated with a client organization.

In our 2022 client survey, administered in February 2023, 98% of respondents reported that they served low-income individuals (those with incomes below 125% of



Population Served: Nonprofit Organizations Serving Low Income Communities or Providing Important Social Services

Total Funding: \$2,924,868

Total IOLA Grant: \$132,910

Staffing Full Time Equivalents:

- Total Staff: 20.3
- Paralegals: 0
- Lawyers: 10.3
- Other: 10

the federal poverty line) in some capacity. Over half of respondents reported that 50% or more of their constituents were low income. 41% responded that more than half of those they serve identify as members of a racial minority. 95% of respondents reported that they assisted one or more underserved populations, such as immigrants, people who are unhoused, or people who are differently abled.

Dollar or other benefits realized by low income people as a direct result of your efforts: The value of the legal services we provided to New York nonprofits during the reporting period is approximately \$17 million. With a relatively small staff and budget, we provide an extremely valuable service to a large number of nonprofits serving the most vulnerable in our communities.

Increased access to justice or improvements in the administration of justice: Nonprofits, like other business entities, must comply with ever-changing laws and regulations and address everyday legal needs, such as contracts, employment matters, leases, or protection of intellectual property. However, legal services are expensive and most nonprofits struggle with minimal resources, even as the ranks of individuals needing their services continue to grow. We make legal counsel affordable and accessible to all qualifying nonprofits by recruiting and supporting hundreds of volunteers annually to provide legal services, saving our clients thousands of dollars that are needed for their programs while enabling them to avoid mistakes, ensure legal compliance, and reduce risk and potential liability. Our free Legal Resource Helpline and affordable education programs also enable nonprofit staff and board members to access the legal information they need to lead their organizations.

Significant improvements in your program's capacity to deliver services: The pandemic caused the unexpected closure of all of our offices in March 2020. Our service model adapted well to the remote work environment, demonstrating that staff could effectively assist clients and volunteers while working outside the office. In 2021, some staff returned to the office on a hybrid schedule, while others continued to work fully remotely. Going forward, staff will deliver services through a mix of remote and in-person work. When Touro Law Center, which housed our Long Island office, notified us that it would no longer be leasing the offices in its Public Advocacy Center, we decided we would not seek replacement space. In fall 2022, our main office space in White Plains was downsized to a smaller space, at significant savings. While much of our work can be done remotely, certain activities, particularly client and volunteer outreach, continue to be conducted in-person whenever possible.

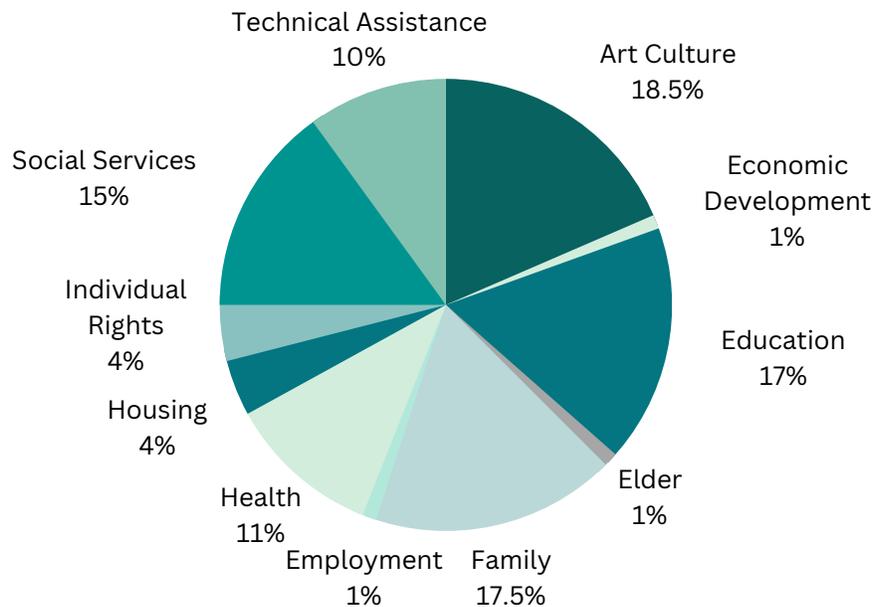
We are making ongoing technology investments to improve our capacity to deliver services in a remote/hybrid work environment. During the reporting period, we

purchased and installed a new server, several new laptops, and docking stations throughout our White Plains office; more details on these projects appear in Section H below. We continued to offer many education programs via webinar because of the lasting effects of COVID, and utilized Zoom to accommodate larger audiences and create closed captioning that makes our webinars more accessible to individuals who are hearing impaired.

In 2022, the Partnership revised its fee structure. At this time, current and past clients are required to be rescreened and pay a modest administrative fee at least once every five years. By implementing this rescreening process, we have increased our capacity to focus our own limited resources on the smaller community-based nonprofits that are at the heart of our mission, in particular, grassroots nonprofits serving communities of color. There is no charge for legal services and no limit to the number of matters an organization can open once its administrative fee is paid. The Partnership’s fees still remain far below what clients would pay at a for-profit law firm. There is a waiver process for organizations that cannot afford to pay a fee.

GROUP SERVICES

292 groups were assisted with 1616 legal matters



Types of Groups Represented

OTHER SERVICES: OVERVIEW

Hotline and Other Telephone-Based Legal Services: Our Legal Resource Helpline is a unique resource for the general public, enabling anyone to speak to an attorney and get informational answers to general questions about nonprofit legal issues. Over the past 26 years, our staff attorneys have answered more than 18,000 such queries. The Helpline helps nonprofit leaders access the resources they need to make more informed decisions and avoid mistakes. During the reporting period, the Partnership responded to 468 Legal Resource Helpline queries from at least 152 New York nonprofits. To access the Legal Resource Helpline, non-clients may call any of our offices or email information@probonopartner.org. Existing clients may call or email any staff attorney with whom they have previously worked. For example, the Westchester Library Association utilized the hotline for a corporate governance question.

Educational Initiatives: The Partnership's staff and volunteer attorneys annually provide numerous educational workshops and webinars for nonprofits to help staff and board members identify pertinent legal issues, adopt best practices, and avoid potential crises. We are offering both workshops and webinars in 2023. For example, we offered a webinar in January of 2023 on The Americans with Disabilities Act for Nonprofits. See section E1 for examples of collaborations. Publications on legal issues for nonprofits are also freely available on our website. Resources are updated on our website and shared with nonprofits via email and social media. The Partnership also sends out Legal Alerts via our email, notifying our newsletter subscribers of any relevant changes to the law.

11,725
people benefitted from
Community Legal Education
Services

OTHER SERVICES: TECHNOLOGY

During the reporting period, we focused on sustaining and improving our capacity to deliver services in the remote/hybrid work environment. We purchased and installed one new server to replace an 8-year-old Domain Controller server (used to host network security, including policies, permissions, passwords, accounts, and access levels). Replacing the Domain Controller server helped to ensure that network security remained strong and the confidentiality of clients' information remained secure. By replacing this server now, we also avoided the significant work disruption that would have resulted from a potential server failure. We also purchased two laptops to replace outdated ones, and to ensure all staff are using approved data security.

As noted above, strengthening remote work capabilities has enabled a planned reduction of physical office space, which has resulted in significant savings. Upon reducing office space in White Plains, the Partnership took the opportunity to remove old desktop computers, install docking stations, and consolidate technological equipment. This past year, a staff committee worked to recommend and create new processes, tools, and internal trainings to optimize our use of Salesforce for program and development data management. One of the staff members on this committee was promoted over the summer, and now focuses on training other staff and documenting Salesforce procedures so that staff turnover will have less of an effect on organizational operations, and to ensure continuity of knowledge.

OTHER SERVICES: TRAININGS

All Staff: All staff receive and complete annual anti-sexual harassment and discrimination training and ongoing cybersecurity trainings.

Legal Staff: Staff attorneys have access to a wide variety of free continuing legal education programs through the law firms that work with us and our institutional membership with PLI. Legal staff can also request to attend legal conferences or bar association programs, for which the Partnership will pay registration and travel costs. During the reporting period, New York Senior Staff Attorney Jennifer Grudnowski attended 16 CLEs presented by PLI. These included "Understanding Employment Law 2022," "Policy and Process Considerations Under the ADA and FMLA," "Preparing for the Post-Pandemic Workplace," and "Diversity, Equity and Inclusion in the Legal Workplace." Other legal staff attended CLEs on unconscious bias and sports law (PLI), real estate, affordable housing, and nonprofit law (NYSBA meeting), cyber security and advising nonprofits (PLI), and employment law, among others.

New staff attorneys work closely with the Program Director and Senior Staff Attorneys when they are hired. They receive legal and procedural training materials, complete relevant CLEs, and observe multiple new client screenings, client and volunteer calls, and education programs led by other legal staff before conducting those activities themselves.

Non-Legal Staff: Development staff attend regular trainings as part of their membership in the Association of Development Officers. Administrative and marketing staff participate in outside trainings relevant to their positions.

DEI Training: Members of our board and staff have participated in anti-racism and DEI trainings offered by the Geraldine R. Dodge Foundation, the IMAGINE MORE coalition, and others, and will continue to do so. New York legal staff also complete DEI trainings as part of their ongoing CLE requirements.

PRO BONO VOLUNTEERS

The Partnership draws primarily on an often-untapped source of volunteer legal services – the professional legal staff of major corporations – as well as business attorneys from private law firms. Staff regularly make outreach presentations to attorneys at law firms and corporations to introduce them to our work and encourage them to volunteer.

Interested attorneys, previous volunteers, and pro bono managers at corporations and law firms are emailed a list of pro bono opportunities bi-weekly. We also maintain a regularly updated list of pro bono opportunities on our website. With assistance from staff attorneys, the Pro Bono Manager and Pro Bono Coordinator manage the placement of matters, often reaching out to specific volunteers directly when a particular expertise is needed.

Once a matter is placed with a volunteer or team of volunteers, they work directly with the client. Staff attorneys continue to remain involved as needed, checking in on the progress of the matter, answering questions, and following up with both the volunteer and client for feedback after the matter is closed. Staff attorneys work particularly closely with volunteers on nonprofit and tax-exempt matters, since these are areas where corporate attorneys tend to have less direct experience. We also offer occasional attorney trainings, model documents, and guides. But for most of our

matters, training and substantive support needs are relatively minimal because the volunteers are counseling on legal matters for which they already have significant expertise.

For several years, we have worked with Practising Law Institute (PLI) to develop and present CLE programs that encourage attorneys to engage in pro bono work and serve on nonprofit boards. These programs are presented live annually and then available on-demand. During the reporting period, Program Director Maurice Segall was a panelist for PLI's CLE program "Ethical Issues in Pro Bono Representation," and Senior Staff Attorney Judy Siegel presented "Serving on a Nonprofit Board as an Attorney" for PLI. Program Director Maurice Segall and Senior Staff Attorney Judy Siegel made CLE ethics presentations for the Farrell Fritz law firm, the Katten Munchin Rosenman law firm, the Henry Schein Legal Department, and the Westchester County Bar Association. We have New York CLE accreditation for our own program "Ethical Issues in Representing Nonprofit Organizations," which we occasionally present for corporate legal departments and law firm attorneys.

Senior Staff Attorney Judy Siegel presented at the New York State Bar Association meeting. Senior Staff Attorney Jennifer Grudnowski presented a CLE for the American Bar Association, entitled "Pro Bono Support: How to Leverage Your Transactional Experience."

We sometimes work with recent graduates or attorneys from other states who are looking to fulfill their 50-hour pro bono requirement for admission to the New York Bar. One of these students volunteered with the Partnership in 2022. We often host one or two law students each summer for a 10-week internship focusing on nonprofit, tax-exempt, and employment law, and occasionally host interns during the school year.



710 Attorneys volunteered 14,555 hours

1 Law Student volunteered 10 hours

SIGNIFICANT COLLABORATIONS

Our most significant collaborations are with the corporate legal departments and law firms that provided the 401 volunteers who assisted our New York clients during the reporting period. Volunteer attorneys from these corporations and law firms also occasionally present workshops and webinars, and a handful help staff attorneys respond to Legal Resource Helpline queries.

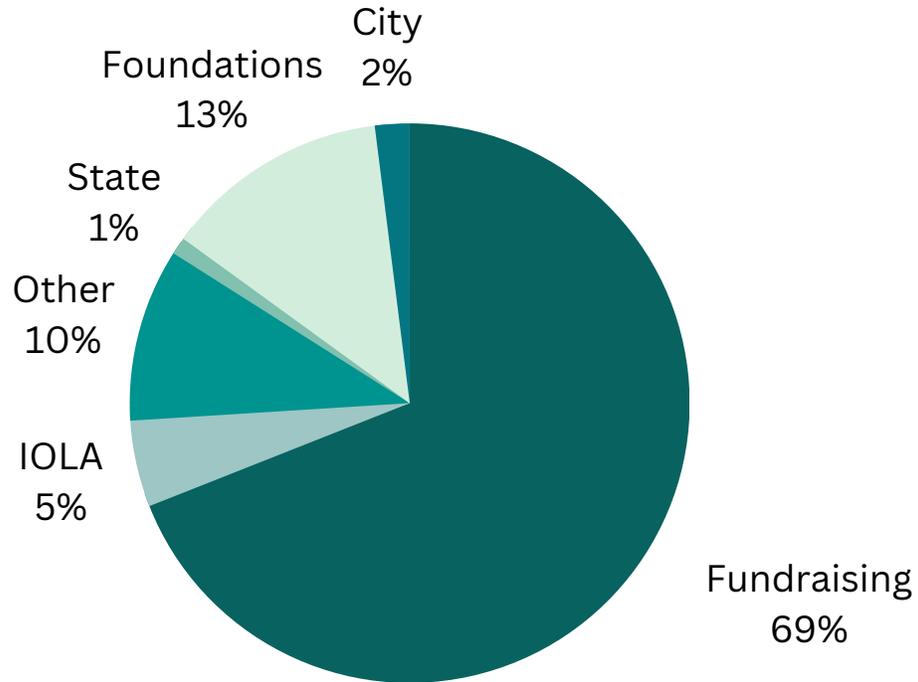
We also collaborate with funders, umbrella organizations, and other technical assistance providers to identify legal issues of importance to our clients, inform our education programs, and identify ways in which we can leverage our expertise to help the nonprofit and legal sectors better meet the needs of local communities. We frequently present education programs with other organizations to train their nonprofit constituents and help increase our own reach. While many activities were conducted virtually during the reporting period because of the lasting effects of COVID, staff have resumed attending and offering in-person events and programs.

Below is a list of some of the education programs we presented during the reporting period in collaboration with other organizations:

- Small Steps: Big Changes, co-sponsored by Ellevest Long Island. April 27, 2022
- Employee Manuals: What to Include, What to Avoid, What to Change, co-sponsored by Nonprofit Westchester. April 28, 2022
- Upsides, Downsides, and Alternatives to Starting a Nonprofit, co-sponsored by SCORE and the South Huntington Library. May 19, 2022
- Good Governance – Advancing Racial Equity and Inclusion on Nonprofit Boards of Directors, co-sponsored by Nonprofit Westchester. June 8, 2022
- Lawyers Serving on a Board, co-sponsored by the Practising Law Institute. July 18, 2022
- Legal Issues for Nonprofits, co-sponsored by the Long Island Community Foundation. September 13, 2022
- The Ins and Outs of Nonprofit Law and Fundraising, co-sponsored by Iona College. October 19, 2022
- Legal Entity Best Practices: Board Strategies, Conflicts, and Accountability, co-sponsored by the New York State Bar. October 21, 2022
- Ethics and the Pro Bono Representation of Nonprofits, co-sponsored by the Westchester County Bar Association. November 15, 2022
- Top Legal Issues Facing Nonprofits, co-sponsored by the New York State Community Development Financial Institution. November 18, 2022
- Top 10 Legal Issues for NFPs, co-sponsored by the United Way of Westchester and Putnam. January 11, 2023

SOURCES OF FUNDING

Pro Bono Partnership received
\$2,924,868
 in total funding this past year



Foundations	\$390,876
IOLA Grant	\$132,910
City and County Funding	\$45,000
Fundraising	\$2,017,726
State Funding	\$30,750
Other	\$307,605
Total	\$2,924,868