Overview of Achievements, 2018-2019

We serve a wide range of nonprofit organizations, channeling our staff and volunteer resources and expertise in program priority areas and special initiatives where we can have substantial impact on low-income New York neighborhoods. In order to bring greater opportunity and justice to those in need, over the past twelve months we have focused on five program priorities: Economic Opportunity; Housing and Shelter; Quality Education; Community Arts; and Urban Health.

During the period of April 1, 2018 through March 31, 2019, Lawyers Alliance achieved the following:

- Provided legal services to a total of 1,340 nonprofit organizations on 2,625 cases, including 1,466 legal services matters and 1,159 consultations through our Resource Call Hotline.
- Engaged 2,231 pro bono attorneys from more than 130 law firms and corporate legal departments to reach more nonprofit clients and provide a larger volume and range of legal assistance.
- Provided community legal education to 1,741 nonprofit representatives receiving training through 18 onsite workshops, 16 webinars, 9 clinics, and 36 special workshops. In addition, we emailed 34 legal alerts to 4,409 nonprofit representatives, which we also made available on our website for a total of 97,978 downloads during the reporting period. We mailed newsletters to 8,512 of our constituents, and also offered a suite of publications written and edited by Lawyers Alliance staff and volunteers.

All of the nonprofit organizations served are working to improve the quality of life in low-income neighborhoods. We assisted clients with a range of legal issues critical to their ability to deliver and expand their programs and effectively run their organizations, including matters related to contracts, regulatory compliance, corporate governance, employment law, board governance, intellectual property, real estate, liability and risk reduction, fundraising regulation, lobbying regulation, incorporation and tax exemption, fiscal transparency, strategic alliances, mergers, and other corporate restructurings.

**Population Served:** General Low Income Population

**Area Served:** New York City Metropolitan Area

- **Total Funding:** $3,229,385
- **Total IOLA Grant:** $145,000

**Staffing - Full Time Equivalents:**

- **Total Staff:** 24.00
- **Paralegals:** 2.00
- **Lawyers:** 16.00
- **Others:** 6.00
Direct Legal Services
2,625 Benefits Achieved
1,340 Non-Profit Groups

Benefits Achieved by Non-Profit Groups
Benefits Achieved 2,625 cases
Non-Profit Groups 1,340 people
Other Services...

Number of People Benefitted by Services Other Than Direct Legal Representation

<table>
<thead>
<tr>
<th>Total</th>
<th>112,640 people</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Legal Education</td>
<td>14,662 people</td>
</tr>
<tr>
<td>Online Assistance</td>
<td>97,978 people</td>
</tr>
</tbody>
</table>

Other Legal Related Services: Overview

From April 1, 2018 through March 31, 2019, Lawyers Alliance provided training for 1,741 nonprofit managers and board members through our educational programs. These included 18 onsite workshops, 16 webinars, and 9 pro bono clinics facilitated by our staff and pro bono attorneys. We also conducted 28 special workshops that were held offsite in collaboration with nonprofit organizations or other key actors in the sector. These trainings addressed sector-wide issues, such as corporate governance and employment law, subjects of general interest to nonprofit organizations, and topics specific to nonprofit organizations working in our program priority areas. A calendar of representative educational trainings is enclosed at the end of this report.

During the grant period, we offered 10 legal publications for nonprofit managers and attorneys who represent them. Researched and written by our staff with assistance from outside experts, the publications include sample forms, checklists, and practical information. Lawyers Alliance sent 34 legal alerts via email to a distribution list of 4,409 nonprofit representatives, including IOLA grantee organizations. The alerts provided timely information about changes in the law and emerging legal issues.
Other Legal Related Services: Examples

Examples of Lawyers Alliance’s other legal-related services during the reporting period include the following:

- We emailed 5 legal alerts relating to advocacy and political activity compliance in an effort to ensure nonprofit organizations have access to information regarding lobbying compliance and other issues that present unique challenge to advocacy organizations. These legal alerts included guidance on social media use, an updated FAQ, and information specific to coalitions. We also distributed legal alerts on topics applicable to all nonprofit organizations, including *Gift Acceptance Policies for Nonprofits, Committees of the Board vs. Committees of the Corporation, and Expanded Reasonable Accommodations Coming Soon to New York City.*

- As part of our commitment to building the capacity of nonprofit leaders, we continued to offer nonprofit organizations across New York City a robust suite of workshops and webinars on timely legal topics, developing several new trainings based on the most pressing needs emerging in the sector. For example, 25 representatives from nonprofit organizations providing social services, affordable housing, and youth education programs attended **Insurance Basics for Nonprofits** to better understand the legal framework for insurance policies that nonprofit organizations might consider in order manage risk and ensure ongoing sustainability. Other workshops and webinars throughout the year focused on legal issues related to fundraising, employment law, advocacy and lobbying, incorporation and tax exemption, and corporate restructuring, among other topics of relevance to a broad base of nonprofit organizations.

Lawyers Alliance continued to offer pro bono clinics for nonprofit organizations to extend our educational programming to more organizations. Our 9 pro bono clinics provided nonprofits with the opportunity to participate in a group educational session followed by a one-on-one consultation with an attorney. Topics included contracts, waivers and releases, and governance policies and practices.

Impact Cases

- **Real Property Tax:** Nonprofit organizations need a real property tax exemption in order to continue providing social and other vital services in gentrifying communities. For several years, our longtime client Drug Policy Alliance (DPA) has been challenging the City Finance Department’s determination that the organization is ineligible for a charitable exemption because it is involved in advocacy. We have been supporting their efforts by submitting friend of the court briefs. In November 2018, the New York Supreme Court issued an opinion ordering the Finance Department to grant DPA the exemption and refund the taxes that DPA has already paid. The City is likely to file an appeal, although it has not done so yet.

- **Donor Disclosure Litigation:** A continuing focus of Lawyers Alliance’s effort to reduce unnecessary burdens is a law that took effect in fall 2016, which requires donor disclosure by 501(c)(3) organizations contributing money, goods, or services to 501(c)(4) organizations engaged in more than a minimal amount of lobbying. In March 2017, Lawyers Alliance and Nonprofit Coordinating Committee of New York filed a federal lawsuit challenging the law on constitutional grounds. This lawsuit was joined for administrative purposes with two other lawsuits challenging the statute, brought by Citizens Union, the ACLU and NYCLU, and the judge entered an order on consent staying enforcement of the law pending the determination of motions for preliminary relief. In May 2018, we filed our motion for summary judgment, and engaged in briefing for the next few months. The federal district court held oral argument on the parties’ summary judgment motions in November 2018 and subsequently struck down the unconstitutional law.
Trainings

In addition to the trainings for nonprofit managers and board members previously mentioned, we provided attorneys with three Continuing Legal Education (CLE) programs. For example, our December 2018 webinar Attorneys Serving on Nonprofit Boards drew attorneys who learned about best practices and ethical issues impacting attorneys on nonprofit Boards, including: competent representation, attorney-client privilege, conflicts of interest and diligent representation, imputed representation, and employer policies. Our November 2018 clinic Checking the List Twice: Updated State and City Laws and How They Affect Nonprofits drew attorneys to learn about all of the New York City and State employment laws that have become effective over the past two years, with attention paid to how they affect the operations of small to mid-size nonprofits.

Technology

During the reporting period, Lawyers Alliance began and substantially completed a revamp of its entire website, including streamlining and its presentation of valuable information to clients, volunteers, and other constituents, its online enrollment system for training sessions, its Application for Legal Assistance mechanism. We have been working to automatically generate and collect Case Closing Questionnaires. This system will send questionnaires to all clients and volunteers upon case closure to measure customer satisfaction with our services and help identify client and volunteer service issues to be addressed. These web-based elements will be finalized and rolled out shortly during the next reporting period. During the most recent reporting period, Lawyers Alliance also upgraded several internal infrastructure elements including its FileMaker based databases (CMS), security, and backup/cloud redundancy systems while preparing for our network-wide migration to Windows 10.
Other Services

Significant Collaborations

Lawyers Alliance partners with umbrella organizations, coalitions, and other technical assistance providers on educational programs and client outreach. Organizations that we partnered with during the reporting period include Coalition of Behavioral Health Agencies, Commission on the Public’s Health System, Supportive Housing Network, ExpandED Inc., The Human Services Council (HSC), LiveOn NY, the National Federation of Community Development Credit Unions, SCORE, the New York City Charter School Center, The New York Immigration Coalition, and United Neighborhood Houses. Among New York City technical assistance providers, we collaborated with and received/provided referrals from/to Cause Effective, Charity Strong, the Community Resource Exchange, Fiscal Management Associates, Nonprofit Coordinating Committee of New York, Nonprofit Finance Fund, and Support Center for Nonprofit Management. Representative collaborations were:

Government Contracting: Lawyers Alliance has a long history of collaborating on issues relating to government contracting, including participation on the New York City Nonprofit Resiliency Committee, which together with Human Service Council, UJA Federation, the Nonprofit Coordinating Committee, the Better Business Bureau of New York, and other nonprofit stakeholders has focused on improving lines of communication between the City and nonprofit human service sector.

Diversity, Equity and Inclusion in the Nonprofit Sector: Lawyers Alliance has been active in working to understand the role of capacity builders, including legal services providers, in adopting and facilitating change. Through a coalition of capacity builders called Ahead of the Curve, Lawyers Alliance is collaborating on an initiative intended to raise awareness of the issues involved, as well as identify (or develop) guides or assessment tools that will be helpful to the nonprofit sector.
Pro Bono Volunteer Involvement

To provide direct services, Lawyers Alliance leveraged its knowledge and resources through its staff-supported pro bono program. Our 1,900 volunteers were from approximately 130 law firms and corporations. Volunteers were engaged in more than 90% of legal matters, allowing us to assist a larger number of nonprofit organizations. We utilized 4 strategies to maximize volunteer involvement and impact:

- **Recruitment:** We engaged in volunteer outreach to maximize the number and diversity of law firms, corporate legal departments, and attorneys, and to replenish the volunteer pool. Outreach included case opportunity emails, consultations with pro bono managers and prospective volunteers, and participation in volunteer-oriented events, such as those of the New York City Bar and State Bar.

- **Expertise and Support:** Our staff attorneys carefully vetted new legal clients and new legal matters and served as co-counsel for all matters placed with volunteers, answering questions and contributing expertise on business law and nonprofit issues.

- **Model Documents, Educational Programs, and CLE Offerings:** Pro bono attorneys obtained research outlines, model documents, and other training materials from co-counseling staff attorneys and through Pro Bono Net. During the reporting period, we provided 2 in-person CLE trainings with a total of 44 attorneys and one CLE webinar attended by 34 attorneys. In addition, 185 attorneys received CLE credit for approved pro bono work for clients.

- **Recognition:** We encouraged clients, volunteers’ employers, and bar associations to thank our volunteers for their work. To this end, we gathered more than 150 people for our 2018 Cornerstone Awards, and distributed volunteer accomplishments to law firms and volunteers.

### Pro Bono Statistics

<table>
<thead>
<tr>
<th>Category</th>
<th>Volunteers</th>
<th>Hours</th>
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</thead>
<tbody>
<tr>
<td>Attorneys</td>
<td>2231</td>
<td>56,918</td>
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<tr>
<td>Law Students:</td>
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<td>1,960</td>
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<td>Other:</td>
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### Sources Of Funding

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
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<td>Iola Grant:</td>
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<tr>
<td>Foundations:</td>
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<tr>
<td>Fundraising</td>
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<tr>
<td>Other:</td>
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</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>$3,229,385</strong></td>
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