Overview of Achievements, 2020-2021

During the reporting period of April 1, 2020 through March 31, 2021, Lawyers Alliance’s staff attorneys and its extensive network of pro bono attorneys provided services to strengthen nonprofit organizations serving low-income New Yorkers. Lawyers Alliance is the oldest and largest provider of pro bono business law services to nonprofit organizations in New York State and the United States. While our legal services are directed to nonprofit organizations working in low-income communities in New York City’s five boroughs, our Resource Call Hotline consultations and educational resources such as webinars are available more broadly to nonprofit organizations throughout New York State. 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. To bring greater opportunity and justice to those in need, over the past twelve months we have focused on five program priorities: Community Arts; Economic Opportunity; Housing and Shelter; Quality Education; and Urban Health. Lawyers Alliance also develops and manages special initiatives that address relevant and evolving legal issues of concern to all categories of nonprofit organizations serving low-income New Yorkers. For example, during the reporting period, our Risk Management work helped organizations improve their management practices and reduce liability, our Nonprofit Advocacy Initiative assisted organizations seeking to undertake lobbying and advocacy activity within the law, and our COVID-19 Relief and Recovery Initiative has been helping organizations navigate legal issues stemming from the pandemic and its significant effects. Although the COVID-19 pandemic and the New York State on Pause shutdown meant we worked remotely during the entire reporting period, our services actively continued albeit in a virtual environment. Our Coronavirus Information web portal launched on March 16, 2020 and was continually updated. Our staff has ensured that nonprofit groups received time-sensitive information through new legal alerts and brief telephone conversations; nonprofit client screenings took place via online meeting platforms; and pro bono clinics have been transformed into virtual on-line consultations. Legal representation matters – both general business law and transactional matters as well as COVID-19 related cases – continued to be placed with volunteers (with our staff attorneys serving as co-counsel) or handled exclusively by our expert staff. In this uncertain period, the needs of nonprofit organizations serving low-income New Yorkers are significant, as are our services.

Population Served: General Low Income Population

Area Served: New York City Metropolitan Area

Total Funding: $3,593,432

Total IOLA Grant: $212,500

Staffing - Full Time Equivalents:
- Total Staff: 20.50
- Paralegals: 3.00
- Lawyers: 10.50
- Others: 7.00
Direct Legal Services

2,562 Benefits Achieved
1,105 Non-Profit Groups
Other Services...

**Number of People Benefitted by Services Other Than Direct Legal Representation**

<table>
<thead>
<tr>
<th>Total</th>
<th>214,813 people</th>
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</thead>
<tbody>
<tr>
<td>Community Legal Education</td>
<td>14,715 people</td>
</tr>
<tr>
<td>Online Assistance</td>
<td>200,098 people</td>
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</tbody>
</table>

*Other Legal Related Services: Overview*

From April 1, 2020 through March 31, 2021, Lawyers Alliance provided training for 1,562 nonprofit managers and board members through our educational programs. These included 28 live and recorded Lawyers Alliance webinars, 98 recorded webinars that were accessed after the initial presentation, and 8 pro bono clinics facilitated by our staff and pro bono attorneys. We also conducted 23 special presentations and trainings in collaboration with nonprofit organizations, law firms and other key actors in the nonprofit sector. These trainings focused on sector-wide issues, such as advocacy, corporate governance, and employment law, subjects of general interest to nonprofit organizations, and topics specific to nonprofit organizations working in our program priority areas. During the grant period, we offered 9 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 31 legal alerts via email to a distribution list of 5,014 nonprofit representatives, including IOLA grantee organizations. The alerts, also posted on www.lawyersalliance.org, provided timely information about changes in the law and emerging legal issues. We also distributed newsletters to 8,139 nonprofit leaders and attorneys.
Other Legal Related Services: Examples

On March 9, 2020, we updated our Disaster Relief webpage and launched our Coronavirus Information web portal www.lawyersalliance.org/coronavirus-information in response to the COVID-19 pandemic. By April 1st, the start of the reporting period, nonprofit associations, government agencies, legal services providers, and others were directing people to this page in droves; it had 2,261 page views in April and May 2020. Since then, as a top priority for our staff, we have been generating, posting, and emailing information on immediate topics such as proper personnel management, disaster relief, government and private aid, the role of nonprofit boards, force majeure, insurance, and more. We issued a total of 16 COVID-19 related legal alerts, shared links to new and recorded webinars, referred website views to essential government resources and nonprofit capacity building organizations, and otherwise used the website and digital communications to provide the most useful resources for a nonprofit coping with operational challenges during the COVID-19 pandemic.

We also assisted nonprofits in New York City that engaged hard-to-count communities for the 2020 Census, and offered election season guidance to nonprofits that wished to conduct voter education events in a nonpartisan manner. Carrying out this work during an election year helped promote voter participation at a time when having a voice in government could not have been more critical for the nonprofit sector and its clients.

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. Since 2012, our longtime client Drug Policy Alliance (DPA) has been challenging the New York City Tax Commission’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 February 2021, the Appellate Division ruled that the Tax Commission’s earlier ruling had been plagued by serious procedural errors, and that DPA has stated an equal protection claim by alleging that tax exemptions had been granted to “other organizations indistinguishable from petitioner in any relevant way apart from the content of their advocacy.” The court remanded the case for further administrative proceedings. We will continue to participate as a friend of the court as appropriate.
Significant Collaborations

Lawyers Alliance partners with umbrella organizations, coalitions, and other technical assistance providers on educational programs and client outreach. During the reporting period, we partnered with such organizations as Coalition for Behavioral Health, Community Health Care Association of New York State, Supportive Housing Network, The Human Services Council (HSC), the National Federation of Community Development Credit Unions d/b/a Inclusiv, SCORE, the New York City Charter School Center, The New York Immigration Coalition, the Staten Island Not-for-Profit Association, and United Neighborhood Houses. Among New York City technical assistance providers, we collaborated with and received/provided referrals from/to Cause Effective, Community Resource Exchange, Fiscal Management Associates, Nonprofit New York, Nonprofit Finance Fund, and Support Center for Nonprofit Management. As a new and very timely example, we participated in a Capacity Building Collaborative along with Cause Effective, Community Resource Exchange, the Support Center for Nonprofit Management, and Operations Inc., targeted to help nonprofits cope with governance, contracts, employment and funding challenges during the pandemic.

Advocating for Nonprofits: Lawyers Alliance is leading an effort to persuade the state legislature to repeal a new law that imposes unnecessary administrative burdens on legal services programs and other New York nonprofits, and threatens the privacy of the organizations’ donors. The new law, section 9 of Executive Law 172-b, requires charities that file an annual financial report with the Charities Bureau and to file that same report with the NY Department of State. The mandatory filing includes the list of major donors on Schedule B to the IRS 990. While the IRS and Charities Bureau have strict procedures in place to protect the confidentiality of the major donor information, the Department of State does not. Our proposed fix is A.1141/S4817, which would repeal the redundant Department of State reporting requirement and also enhance privacy protections for major donor information filed with the Charities Bureau. Advocates for Children, Bronx Legal Services, Center for Family Representation, Her Justice, Lawyers for Children, Make the Road New York, and Pro Bono Partnership are among the legal services organizations that have signed our legislative memo of support for this bill.
Trainings

In July 2020, our live CLE presentation on “Responsibilities of Nonprofit Board Members in the time of COVID,” appropriate for newly-admitted and experienced attorneys, focused on ways nonprofit board members can and should help their nonprofits move forward productively. The training illustrated ways board members can participate by complying with their fiduciary duties, participating in committee work, virtual meetings, financial management, and other principles of sound Board governance and legal ethics. We are members of the Practicing Law Institute and all lawyers have free access to unlimited CLE trainings.

During each Board meeting, a program presentation provides the Directors with information and a program presentation that illustrates the legal work carried out by our legal staff and volunteers, as well as the compelling programs provided by our clients. Additionally, regular reports to the Board provide a comprehensive listing of each new client and new matter so that the Board is engaged and kept apprised of the legal needs and challenges in the sector, educating them about the sector’s challenges and enabling them to help recruit talented volunteers from within their firms. The program presentations combined with information on our organization’s finances and operational developments are supplemented with senior staff lead orientations when needed for newly-elected Board members. Staff members are encouraged to pursue professional development opportunities to enhance their program and related legal work. During the grant period, staff participated in an anti-sexual harassment training, as well as regular computer security trainings.

Technology

In addition to enhanced use of GoToMeeting, Zoom, Teams, virtual consultations, virtual events, social media posts, and other online systems and communications, we pursued the following significant technology improvements:

- In 2020, we began disseminating and collecting the results of client and volunteer case closing questionnaires using our improved web-enabled FileMaker database, which enables automated emails and direct entry of information into the database. In 2020, compared to 2019, the response rate remained above 55% percent for clients and 40% for volunteers, notwithstanding the pandemic, and we captured useful information more quickly in the database.

- Our development team is relying more heavily on electronic communication with donors than in the past, necessitating updated documentation protocols for tracking and acknowledging gifts. We are receiving and sending more credit card payments and wire transfers, prompting updates to our financial procedures and careful monitoring of electronic transactions.

- Finally, we have reviewed, and will continue to review, our technology procedures to consider what other steps may be appropriate to protect confidentiality and security of information. For example, this year we introduced more frequent password changes, monthly training and testing on phishing and other issues to increase staff security awareness, and Multi-Factor Authentication.
Pro Bono Volunteer Involvement

To provide direct services, Lawyers Alliance leveraged our knowledge and resources through our staffsupported pro bono program. Our 2,438 pro bono attorneys were from approximately 133 law firms and corporations. Volunteers were engaged in more than 91% of legal matters, allowing us to assist a larger number of nonprofit organizations. We utilized four 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 LawHelpNY. During the reporting period, we provided 3 CLE trainings for a total of 54 attorneys and we presented 2 CLE trainings for law firms for a total of 180 attendees. In addition, 104 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 90 people for our virtual 2020 Cornerstone Awards, and publicized 4 special Volunteer Accomplishments about law firms and volunteers and 2021 alerts about the Cornerstone honorees via our website, Probono.net, and email announcements.

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<thead>
<tr>
<th>Pro Bono Statistics</th>
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<tbody>
<tr>
<td>Attorneys</td>
</tr>
<tr>
<td>2,438 Volunteers</td>
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<tr>
<td>61,537 Hours</td>
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<tr>
<td>Law Students:</td>
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<td>8 Volunteers</td>
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<tr>
<td>Other:</td>
</tr>
<tr>
<td>4 Volunteers</td>
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<tr>
<td>2,140 Hours</td>
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</table>

Sources Of Funding

- IOLA Grant: $212,500
- Foundations: $806,500
- Fundraising: $965,592
- Other: $1,608,840
- Total: $3,593,432