Overview of Achievements, 2020-2021

Number of people and organizations benefited: Pro Bono Partnership does not assist individuals. During the grant period, the Partnership assisted 292 New York nonprofit organizations on direct legal matters and offered 37 educational programs, many of which were held in collaboration with other community organizations; these were attended by 3,028 people.

Dollar or other benefits: Pro Bono Partnership provided more than $6.2 million in legal services to New York State nonprofits during the grant period. With a relatively small staff and budget, Pro Bono Partnership is able to provide an extremely valuable service to a large population of nonprofit organizations serving the most vulnerable in our communities. With the Partnership's help, nonprofit organizations avoid crises, risks, and costly mistakes that might hamper their ability to serve their clients effectively.

Primary target population: The target population for this grant were New York 501(c) (3) nonprofit organizations and organizations wishing to incorporate as 501(c) (3) nonprofits, particularly in the main regions the Partnership serves: Lower Hudson Valley (Westchester, Orange, Rockland, Putnam Counties) and Long Island, (Nassau, and Suffolk Counties). During the reporting period, the Partnership also served clients in other parts of the state, including a notable number of clients in Ulster County and in the Capital Region (with clients in Columbia, Albany, Saratoga, Schenectady, and Rensselaer Counties). The Partnership's clients are organizations that are assisting underserved populations or enhancing the quality of life in their communities and cannot otherwise afford legal assistance. They have legal needs that Partnership staff attorneys and volunteers can address. Partnership workshops, webinars, website and Legal Resource Helpline are available to any New York nonprofit. In the Partnership's Annual Client Survey, administered most recently in February 2021, 98% of clients stated that they serve economically disadvantaged populations (those living under the Federal Poverty Line) at some capacity and nearly half stated they serve 50% or more of this population.

Increased access to justice: Nonprofits, like other independent entities, must comply with ever-changing regulatory frameworks and address everyday business legal needs, such as contracts, employment, and real estate issues. However, many nonprofits choose to go without legal advice, either because they do not recognize the need for counsel or do not feel that it is affordable, given continued systemic funding challenges. The need for accurate and accessible legal advice for small and medium nonprofits was only highlighted by the rapidly changing laws enacted in the response to COVID-19. During the reporting period, the Partnership provided assistance on HR, federal loans, contracts, waivers, and revising bylaws and policies directly related to the pandemic and the need to move programs and meetings to virtual and other safe formats. The Partnership opened 133 direct legal matters related to the pandemic during the reporting period, and about 22% of new matters placed were directly related to the pandemic. 263 of the 624 Legal Resource Helpline Calls were also related COVID-19. Pro Bono Partnership makes legal counsel affordable and accessible to all qualifying nonprofits by mobilizing more than 1,400 volunteers annually to provide free legal services, effectively saving community nonprofits hundreds of thousands of dollars and strengthening their infrastructure so that they can continue to strengthen their community. In addition to offering free, direct legal help to qualifying organizations, Pro Bono Partnership provides proactive legal education that is both affordable and accessible to community nonprofits. Sixteen of the education programs offered were on issues directly related to the pandemic.

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

Area Served: Lower New York Hudson Valley & Long Island

Total Funding: $2,339,611

Total IOLA Grant: $114,619

Staffing - Full Time Equivalents:

- Total Staff: 20.15
- Lawyers: 9.40
- Others: 10.75
Group Services

292 nonprofit groups assisted with 1,332 legal matters
Significant Collaborations

The Partnership’s most significant collaborations are with corporate in-house legal departments and law firms that provided the 711 volunteer attorneys who assisted the Partnership’s New York clients on about 85% of legal matters each year. These corporations and law firms also provide attorneys that present a number of workshops and webinars, as well as respond to a limited number of Legal Resource Helpline queries referred by Partnership staff attorneys.

The Partnership also collaborates with organizations identifying legal issues of importance to the community, providing educational workshops and identifying ways in which the Partnership can leverage its legal expertise to help nonprofit organizations and lawyers better meet the needs of local communities. During the reporting period, collaborating with other organizations helped increase the reach of the Partnership’s education programs, especially those on topics responsive to the needs of the community, such as those related to COVID-19, increased sensitivity to diversity and inclusion initiatives, and political activism in the wake of the protests against racism and police brutality over the summer. The Partnership did not charge an attendance fee for the webinars directly related to the pandemic. Working with other organizations meant that the Partnership could support more virtual attendees than it normally would be able to if it were using its own technology. Webinars hosted directly by the Partnership currently support up to 100 attendees, but the Partnership is looking into ways to expand this number. The Partnership was not able to hand out any brochures for its services as there were no in-person workshops or events held during the reporting period. However, the popularity of the free COVID-19 webinars helped increase the number of people attending the Community Legal Education programs during the reporting period, so the total number of attendees was much higher than would be expected in a normal year.

During the reporting period, the Partnership collaborated with Exponentum, Adelphi University Center of Nonprofit Leadership, the Child Care Council of Westchester, Nonprofit Westchester, Robinson+Cole LLP, VolunteerNY!, Friends of the New York State Library Association, the Westchester County government, and United Jewish Association (UJA), among others.
3,028 People Benefitted by Community Legal Education

The Partnership presented several workshops co-sponsored by various organizations including:

- CARES Act, co-sponsored by Nonprofit Westchester. April 3, 2020
- FCCRA Webinar, co-sponsored by Childcare Council of Westchester. April 7, 2020
- Legal Considerations for Reopening New York Nonprofits to Employees and the Public After COVID-19, co-sponsored by Robinson+Cole LLP. June 18, 2020
- Advocacy and Lobbying for NY Nonprofits – Yes, You Can! co-sponsored by Nonprofit Westchester. August 11, 2020
- Legal Landmines: Nonprofits Navigating Return to Work During the COVID-19 Pandemic, co-sponsored by Exponentum. September 2, 2020
- Top Legal Issues for Nonprofits, for the Susan Ross New Executive Director Institute, co-sponsored by the Fairfield County’s Community Foundation (open to multi-state attendees). September 18, 2020.
- From Inspiration to Impact, co-sponsored by the United Jewish Association. February 24, 2021.
- PBP Staff attorney was a panelist on a nonprofit webinar for Members of the Westchester County “Launch 1000” Program. February 24, 2021

The Partnership also presented a personalized board training for the board of NAMI New York State via Zoom. The Partnership plans to offer this service to any nonprofit as another way of generating earned income.
**Hotline and Other Telephone-Based Legal Services**

Pro Bono Partnership's Legal Resource Helpline is a unique tool for the community, enabling nonprofit managers and directors to speak to or email the Partnership with quick/discrete legal questions. Since the Partnership was established in 1997, staff attorneys have answered more than 17,000 such inquiries. The ability to obtain immediate responses through the Partnership’s Helpline helps nonprofit managers and directors and others to make sound and informed decisions that are in the best interest of their organizations and clients. During the reporting period, the Partnership responded to 624 Legal Resource Helpline queries from New York State residents. To access our Legal Resource Helpline, non-clients may simply call any of the Partnership’s offices or email information@probonopartnership.org. Existing clients may call or email any staff attorney with whom they have previously worked.

**Trainings**

The Partnership provides various training and professional development opportunities. The Partnership sponsors its staff attorneys’ CLE requirements. During the grant period, they participated in educational topics such as “Illinois, California and New York Labor & Employment Law Update: Get Ready for 2020”, “New York Shield Act: What It Means For Your Organization”, “Business Valuation”, and “Blogging for Lawyers”. In addition, one legal staff member attended the Georgetown Law School’s Representing and Managing Tax-Exempt Organizations conference in April 2019.

Employees who focus on the Partnership’s administrative functions participate in various trainings and conferences offered by various professional organizations including in-person workshops and webinars held by the Association of Development Officers, the Association of Fundraising Professionals, KnowB4, and Network for Good. In 2019, our Pro Bono Coordinator and Development/Events Coordinator were accepted in and completed a year-long Emerging Leaders program run by Nonprofit Westchester. Our Development/Grants Coordinator was accepted to Emerging Leaders program for 2020. The entire Pro Bono Partnership staff participated in an in-person workshop on Workplace Harassment presented by an employment attorney at Jackson Lewis, PC. Managers participated in a full-day management training session facilitated by the Support Center for Nonprofit Management.
Pro Bono Volunteer Involvement

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. Members of the Partnership’s volunteer corps, as well as pro bono managers at corporations and law firms, are emailed a list of pro bono opportunities bi-weekly. An updated list of volunteer opportunities is also available on the Partnership’s website. With assistance from Partnership staff attorneys, the Partnership’s 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. The Partnership also provides customized presentations for a firm or corporation’s new attorneys, as well as a wealth of resources, including model documents and guides.

Volunteer attorneys provide direct legal services to the Partnership’s clients either as a result of requesting a matter they have identified on our list of volunteer opportunities, or because they have been recruited by one of our staff for a matter in which they have expertise. The volunteers deal directly with the client once staff has placed the matter with them, but staff attorneys stay actively involved on every matter, checking in on the progress of the matter, providing any support that may be needed and following up with volunteer and client for feedback after the matter is closed. Our matters offer excellent experience in significant and often intricate business and transactional legal matters. Staff attorneys work particularly closely with volunteers on nonprofit and tax-exempt matters, since these are areas where our corporate volunteers tend to have less direct experience. During the grant period, Pro Bono Partnership connected 711 volunteer attorneys with 292 New York State nonprofits.

The Partnership has presented a training for many legal departments and law firms attorneys on Ethical Issues in Representing Nonprofit Organizations, which was approved by the NYS CLE Board to offer 1.5 NY CLE ethics credits. In March 2020, the Partnership applied to the New York State CLE Board for reaccreditation of this course (response has been delayed, presumably because of the COVID-19 pandemic). The Partnership did not offer this course in 2020, but is considering doing so once the pandemic subsides. For the past several years, Program Director Maurice Segall has participated as a panelist for the Practicing Law Institute’s annual workshop on “Ethical Issues in Pro Bono Representation.” The most recent event was held virtually on December 10, 2020 and had 450 attendees.

Several of the Partnership’s staff also annually present for the Practicing Law Institute on nonprofit and ethical issues. The Partnership occasionally works with recent graduates who are looking to fulfill their 50-hour pro bono requirement for admission to the New York Bar, and has hosted one or two law students each summer for a 10-week internship focusing on nonprofit, tax-exempt, and employment law. The Partnership had another intern from Pace Law School who worked with staff attorneys virtually during the summer in 2020. In 2021, a law student from Touro Law School began volunteering virtually with the Partnership. Compared to previous years, law students volunteered less time with the Partnership due to the COVID-19 pandemic and the difficulty of organizing meaningful projects virtually.

Pro Bono Statistics

| Attorneys | 775 Volunteers | 14,576 Hours |
| Law Students | 2 Volunteers | 20 Hours |

Sources Of Funding

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>IOLA Grant</td>
<td>$114,619</td>
</tr>
<tr>
<td>Foundations</td>
<td>$334,500</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$1,765,712</td>
</tr>
<tr>
<td>Other</td>
<td>$124,780</td>
</tr>
<tr>
<td>Total</td>
<td>$2,339,611</td>
</tr>
</tbody>
</table>