Overview of Achievements, 2018-2019

Number of people and organizations benefited: Pro Bono Partnership does not assist individuals. During the grant period, we assisted 297 New York nonprofit organizations.

Dollar or other benefits
Pro Bono Partnership provided nearly $6.3 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 counties we serve: Westchester, Orange, Rockland, Putnam, Nassau, and Suffolk Counties. Our clients are organizations that cannot otherwise afford legal assistance and that have legal needs we can address. Our workshops, webinars, website and Legal Resource Helpline are available to any New York nonprofit.

Increased access to justice: 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. Under the direction of Legal Director Courtney Darts, the educational program’s goals are to empower nonprofit leaders to recognize their legal needs, learn how to comply with applicable laws, and understand when they need to consult a lawyer for specialized advice.

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

Area Served: Lower New York Hudson Valley

Total Funding: $2,628,722

Total IOLA Grant: $70,000

Staffing - Full Time Equivalents:
- Total Staff: 20.10
- Lawyers: 11.10
- Others: 9.00
Direct Legal Services
1,372 Benefits Achieved
297 Non-Profit Groups

Benefits Achieved by Non-Profit Groups

Benefits Achieved 1,372 cases
Non-Profit Groups 297 groups
Other Services...

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 topics as diverse as “The #MeToo Movement: Strategies to Prevent Harassment and Protect Your Non-Profit Organization;” “Executive Compensation for Nonprofits – Conforming to the New Tax Law;” ”Executive Compensation for Nonprofits – Conforming to the New Tax Law;” ”Transgender Legal Issues;” “Let’s be Blunt: Marijuana in the Workplace;” and “New York Not-for-Profit Organizations” presented by the NYS Bar Association.

In addition, two legal staff members attended the Georgetown Law School’s Nonprofit Governance and Representing and Managing Tax-Exempt Organizations conference; and the Executive Director and Legal Director attended the Pro Bono Institute Conference in Washington, DC, where Executive Director Nancy Eberhardt was a presenter for a session on transactional pro bono opportunities.

Employees who focus on the Partnership’s administrative functions participate in various trainings and conferences offered by various professional organizations including in-person workshops at The Support Center, the Association of Development Officers, Association of Fundraising Professionals, webinars offered by Network for Good, Ahern Communications, etc. In spring 2018, the entire Pro Bono Partnership staff participated in an in-person workshop on Workplace Harassment presented by an employment attorney at Jackson Lewis, PC.

Technology
During the grant period we worked with Kell Partners to migrate our fundraising database into our new Salesforce CRM. This project will result in a single, organization-wide database. After much research and a cost-benefit analysis, in spring 2018, the Partnership purchased and installed a new Dell PowerEdge R700 Series RackMount Server to manage our email (thus our external connectivity) and provide data storage for the entire organization. The Partnership’s previous exchange server was seven years old and had exceeded its capacity. The new server has greatly enhanced our data management capacity and communication speed.
Significant Collaborations

The Partnership’s most significant collaborations are with corporate in-house legal departments and law firms that provided the 710 volunteer attorneys who assisted our 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 our staff attorneys.

The Partnership also collaborates with organizations identifying legal issues of importance to the community, providing educational workshops and identifying ways in which we can leverage our legal expertise to help nonprofit organizations and lawyers better meet the needs of local communities. We collaborate with Exponentum, as well as with the Adelphi University Center of Nonprofit Leadership, Adelphi University Center of Nonprofit Leadership, ArtsWestchester, the Child Care Council of Westchester, Nonprofit Westchester, SCORE, and VolunteerNY! among others. During the grant period, the Partnership presented several workshops co-sponsored by various organizations including:


- **Strategic Legal Thinking for Nonprofits: Advocacy, Lobbying & Political Activity**, co-sponsored by Exponentum. Webinar. June 20, 2018


- **Pfizer Strategic Thinking for Nonprofits Series: Insurance**, co-sponsored by Exponentum. Webinar. October 17

- **Legal Issues 101 for Nonprofits**, co-sponsored by Catalog for Giving. Workshop. October 23, 2018


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.

Pro Bono Statistics

<table>
<thead>
<tr>
<th>Category</th>
<th>Volunteers</th>
<th>Hours</th>
</tr>
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<tbody>
<tr>
<td>Attorneys</td>
<td>997</td>
<td>14,732</td>
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<tr>
<td>Law Students:</td>
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</table>

Sources Of Funding

- Iola Grant: $70,000
- Foundations: $457,659
- Fundraising: $1,748,874
- Other: $352,189
- Total: $2,628,722