Overview of Achievements

**Number of people and organizations benefited:** Pro Bono Partnership does not assist individuals. During the grant period, we assisted 287 New York nonprofit organizations on direct legal matters, answered Legal Resource Helpline queries from at least 160 New York nonprofits, and recruited and supported 612 legal volunteers. We also offered 41 education programs, many of which were held in collaboration with other community organizations; these were attended by nearly 2,500 people in total.

**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 a notable number of nonprofits in Ulster and Dutchess Counties and nonprofits in Albany, Columbia, Delaware, Essex, Monroe, Ontario, Saratoga, Schenectady, Sullivan, and Tompkins Counties.

**Dollar or other benefits:** The value of the legal services we provided to New York nonprofits during the reporting period is approximately $7.9 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. In addition to assisting clients with their ordinary business legal needs, we continued to help nonprofits navigate challenges related to the COVID-19 pandemic, including advising on complex government loan or grant programs; renegotiating or terminating leases; and drafting policies and protocols to keep employees, volunteers, and constituents safe and healthy. We offered eight education programs on pandemic-related topics, including return-to-office considerations and cybersecurity concerns, and answered at least 70 COVID-related Helpline queries. We also issued ten Legal Alerts about relevant changes to federal and state laws and regulations affecting New York nonprofits.

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

**Area Served:** Lower New York Hudson Valley & Long Island

**Total IOLA Grant:** $133,252.20

**Staffing Full Time Equivalents:**
- Total Staff: 20.3
- Other: 10.7
- Lawyers: 9.6
Overview of Achievements

Increased access to 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.

Group Services

287 nonprofit groups assisted with 1,305 legal matters

Types of Groups Represented

- Education: 21%
- Elder: 3%
- Economic Development: 4%
- Employment: 6%
- Family Children’s: 5%
- Health: 15%
- Housing: 4%
- Individual Rights: 7%
- Individual: 7%
- Technical Assistance: 4%
- Other: 6%
- Art Culture: 17%
- Economic: 4%
- Education: 21%
Other Services: Technology and Other Innovations

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 two new servers to replace a 7-year-old Terminal server (used to host remote access for users working outside the office) and an 8-year-old Domain Controller server (used to host network security, including policies, permissions, passwords, accounts, and access levels). Replacing the Terminal server resulted in faster, more sustainable, and more efficient remote work, and reduced the number of work interruptions and lost data incidents resulting from remote connection problems. 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 will result in significant savings. This past year, we also changed the platform that we use for webinars in order to make our programs more accessible to individuals who are hearing impaired and accommodate larger audiences. We also created a staff committee to recommend and create new processes, tools, and internal trainings to optimize our use of Salesforce for program and development data management. Recently, we improved the process for recording attorneys’ time to enable more efficient and consistent tracking.

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 legal staff attended several CLE programs, including Jackson Lewis’s Virtual Workplace Law Conference, “Innovative Ways In-House Law Departments and Law Firms Can Partner to Advance DEI” (PLI), “Anti-Racist Lawyering” (PLI), and “Diving Deeper into UBIT” (Venable).

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.
Other Services: Trainings

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. During the reporting period, the New York Program Assistant participated in an “Emerging Leaders” program with Nonprofit Westchester, a training and networking resource for staff in entry and mid-level positions in Westchester County nonprofits. She is the third staff member to complete this program.

DEI Training: In September 2021, all staff participated in a “Respectful Workplace” training led by attorneys from Day Pitney LLP. 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.

Impact Cases

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 25 years, our staff attorneys have answered more than 17,000 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 527 Legal Resource Helpline queries from at least 160 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.

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. 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.
Pro Bono Volunteer Involvement

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 for a year. During the reporting period, Program Director Maurice Segall was a panelist for PLI’s CLE program “Ethical Issues in Pro Bono Representation” and Executive Director Nancy Eberhardt co-chaired PLI’s CLE program “Serving on a Nonprofit Board: Practical and Ethical Considerations for Attorneys” for the fifth time. Senior Staff Attorney Judy Siegel also presented a nonprofit law CLE for members of the New York State Bar Association in November 2021. We also 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.

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. We 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, including a current intern from Touro Law School.

674 Attorneys volunteered 12,792 hours

1 Law Student volunteered 15 hours
Our most significant collaborations are with the corporate legal departments and law firms that provided the 612 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. During the reporting period, these included several free webinars on COVID-19 topics; attendance numbers for these programs were unusually high, due to the demand for up-to-date and reliable information on changing laws and regulations. While most activities were conducted virtually during the reporting period because of COVID, staff have recently 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:

- **Getting Back to Work**, co-sponsored by the Center for Nonprofit Leadership at Adelphi University. April 13, 2021
- **Developing Your Nonprofit Remote Work Policy**, co-sponsored by Nonprofit Westchester. April 15, 2021
- **COVID Leaves and Vaccines**, co-sponsored by the Child Care Council of Westchester. April 20, 2021
- **Top Ten Legal Issues for Nonprofits**, co-sponsored by Nonprofit Westchester. May 13, 2021
- **Cybersecurity Issues for Nonprofits**, co-sponsored by Nonprofit Westchester. June 3, 2021
- **Common Legal Issues Facing Nonprofits**, co-sponsored by the Long Island Nonprofit Leadership Roundtable. July 22, 2021
- **Returning to the Office – Legal Issues Related to Vaccinations, Masks, and Social Distancing**, co-sponsored by the Hartford Foundation for Public Giving. August 16, 2021
- **Nonprofit Board Boot Camp**, co-sponsored by Volunteer New York! November 3, 2021
- **Navigating Conflict of Interest Transactions**, co-sponsored by the Nonprofit Resource Hub. November 9, 2021
Significant Collaborations

- Taking it to the Streets – Lobbying and Political Campaign Activities for Nonprofits, co-sponsored by Nonprofit Westchester. January 13, 2022
- Build a Better Board, Starting Today, co-sponsored by the Association of Development Officers. January 19, 2022
- The Partnership Between Your Board and Your Staff: Maximizing Time to Increase Impact, panel presentation at NYN Media BoardCon. January 27, 2022
- Transparency and Accountability for Nonprofits, co-sponsored by the Hartford Foundation for Public Giving. February 24, 2022
- Nonprofits 101: Information on Starting and Maintaining Your Own Nonprofit, co-sponsored by the Office of Westchester County Legislator Chris Johnson. March 9, 2022
- Nonprofit Executive Leadership Roundtable, co-sponsored by Philanthropy in Phocus. March 24, 2022
- Introduction to the New York State Charities Bureau and the Upcoming Electronic Filing Requirement, co-sponsored by Nonprofit Westchester. March 30, 2022

Sources of Funding

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<th>Source</th>
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