

LAWYERS ALLIANCE FOR NEW YORK

2023 – 2024

Report

OVERVIEW OF ACHIEVEMENTS

During the reporting period of April 1, 2023 through March 31, 2024, Lawyers Alliance’s staff and its extensive pro bono network provided timely, quality legal services to strengthen the capacity and impact of nonprofit organizations serving low-income New Yorkers. We continued to build on our experience as the oldest and largest provider of pro bono business law services to nonprofit organizations in New York State and the U.S. to address legal issues that are relevant to the success of nonprofits today.

Our legal representation services are directed to nonprofit groups working in low-income communities throughout New York City’s five boroughs. Our Resource Call Helpline, legal alerts, webinars, and other educational resources are available more broadly to assist nonprofits across the State.

We continued to serve nonprofit and social purpose organizations with a wide range of missions and activities aimed at improving quality of life in low-income New York neighborhoods. We channeled our staff and volunteer resources and expertise towards pressing community needs. Over the past twelve months, five program priorities stood out for heightened client outreach and legal assistance: Economic Opportunity; Housing and Human Services; Quality Education; Community Arts; and Urban Health. Lawyers Alliance also pursued special initiatives that addressed evolving legal and systemic issues of concern to all categories of nonprofit organizations serving low-income New Yorkers. During the reporting period, Lawyers Alliance’s cross-sector initiatives focused on helping nonprofits tackle legal risk management, engage in community organizing and advocacy activity within the law, advance equity and social justice, deal with post-pandemic challenges, and cope with legal issues stemming from economic uncertainty and



Service Area: New York City

Population Served: General Low-Income Population

Staffing Full Time Equivalents:

| | |
|-------------------|-------------|
| Total Staff: 21.2 | Lawyers: 11 |
| Paralegals: 3 | Others: 7.2 |

change. During April 1, 2023 through March 31, 2024, Lawyers Alliance:

- Provided legal services to a total of 1,219 nonprofit organizations and social enterprises on 1,433 full scope legal representation matters and 1185 brief customized consultations (including 1,013 inquiries through the Resource Call Helpline and 172 consultations through clinics and other limited-scope consultations), for a total of 2,618 cases/legal projects.
- Engaged 2,371 pro bono attorneys from law firms and corporations to reach more nonprofit clients and provide a larger volume and range of quality legal assistance.
- Provided community legal education through live and recorded webinars, newsletters, legal alerts, and publications (a total of 38,648 educational interactions).
- Offered web-based assistance through our website that totaled 63,378 downloads.

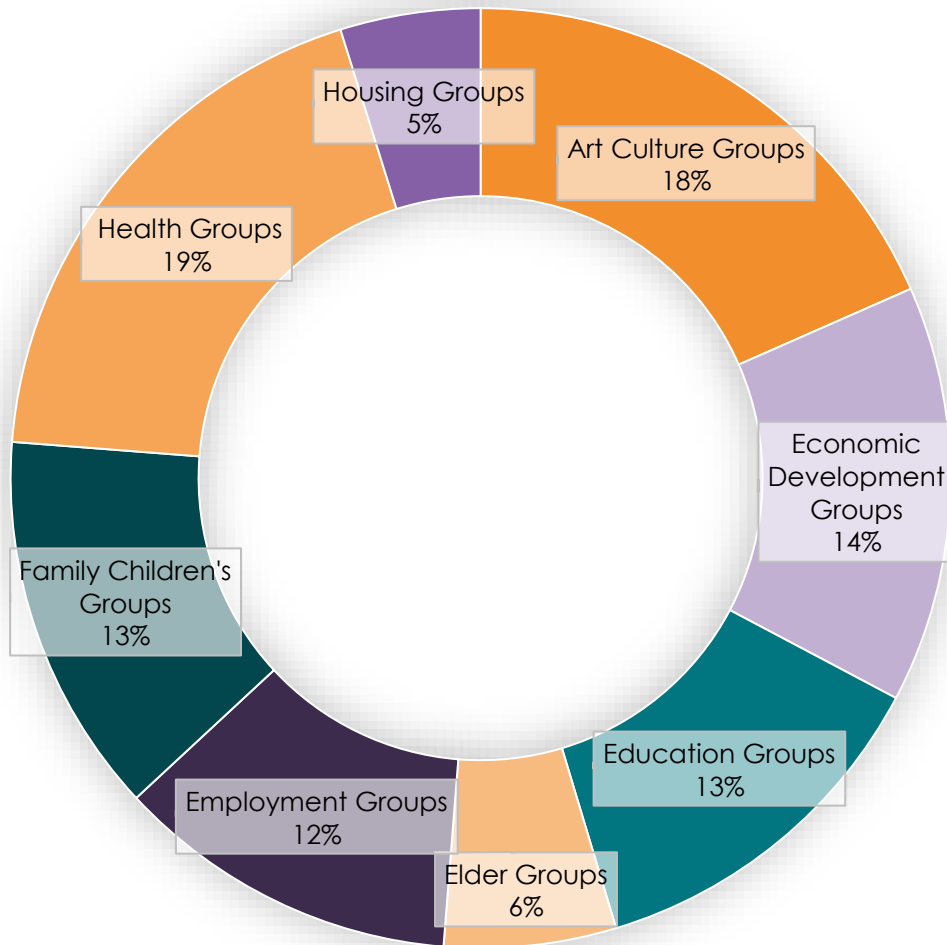
Frequent legal issues included contracts, regulatory compliance, employment law, board governance, intellectual property, information technology, leases and subleases, liability and risk reduction, fundraising regulation, lobbying regulation, incorporation and tax exemption, fiscal sponsorships, strategic alliances, mergers, and other corporate restructurings.

Our legal guidance helped nonprofits to sustain and adapt programming, manage risks, and maximize resources. The result is better programs, finances and operations. Casework examples include:

- Bronx House provides programs and services that promote understanding, interaction, and cooperation among community residents of all ages, and serves as a community and cultural center for people of diverse backgrounds. Pro bono counsel provided an opinion letter to the Dormitory Authority of the State of New York (DASNY) enabling Bronx House to access a \$250,000 DASNY grant to pay for four HVAC units for its community center.
- East Harlem Council for Human Services provides health and human services to the East Harlem community and runs the Boriken Neighborhood Health Center, a Federally Qualified Health Center, among other health-related programs and services. Pro bono counsel reviewed a license agreement for the use of a senior center located in Casabe Housing on East 121st Street by EHCHS to provide senior nutrition services.

DIRECT SERVICES FOR NON-PROFIT CORPORATIONS AND OTHER GROUP ENTITIES

1,219 non-profit or group entities received assistance through **2,618** cases closed



Types of Groups Represented

OTHER LEGAL-RELATED SERVICES

Community Legal Education: From April 1, 2023 through March 31, 2024, Lawyers Alliance provided training for nonprofit managers and board members through our educational programs, including live and recorded webinars, newsletters, legal alerts, and publications (a total of 38,648 educational interactions).

Legal Education Material: Lawyers Alliance sent 31 Legal Alerts via email to a distribution list of nonprofit representatives, including IOLA grantee organizations (19,400 emails received).

Interactive Presentations: These included 19 live webinars with 327 attendees, 2 in-person workshops with 20 attendees, 12 pro bono clinics attended by representatives from 128 nonprofits, and 22 special presentations and trainings for 982 participants. We offered presentations in collaboration with nonprofit organizations, law firms, corporations, professional associations, and other key actors in the nonprofit sector. These presentations covered subjects of wide interest to nonprofit managers, such as corporate governance and employment law, and topics targeting organizations working in our program priority areas such as educational enrichment or community arts.

Pre-Recorded and Other Static Online Content: Selected recorded webinars are available for viewing on the Lawyers Alliance website, along with other static resources; webinars on board governance recorded in Spanish, Mandarin, Arabic, and Korean are available on the website. Eight publications are available on the website.

38,648

people
benefited from
**Community
Legal
Education**

63,378

people
benefited from
**Web-Based
Assistance**

Other: Newsletters were sent in Autumn 2023 and Winter 2024 to 8,700 nonprofit, legal, and community contacts each time (for a total of 19,400).

Online Outreach: Legal alerts were also posted on www.lawyersalliance.org and provided timely information about changes in the law and emerging legal issues. During the reporting period our web-based assistance reached 63,378 downloads/impressions (according to revised analytics approach).

EXAMPLES

Resource Call Service: Through Lawyers Alliance’s free Resource Call Helpline – the only program of its kind in New York City – staff attorneys provided information and other resources to help nonprofit leaders and their attorneys with questions related to running a nonprofit organization. This service is available to clients and non-clients alike, and is utilized by those in New York City and across the state.

Webinars/Presentations: Our interactive webinars have addressed topics of general interest to nonprofits, such as updates to employment regulations, contracts, leases, waivers and releases, and governance. For example, 37 nonprofit leaders participated in the 4/20/23 webinar “The Role of the Nonprofit Board of Directors: Legal Responsibilities and Best Practices,” while 28 participants attended the 4/27/23 webinar “Careful Lobbying Compliance: Keeping Track of the Required Reports and Restrictions on Lobbyists’ Activities.”

Legal Alerts and Other Publications: “Bylaws That Work” (3rd edition), newly revised and completed at the start of the reporting period, provided outreach opportunities to all of the groups we interact with. It helps not-for-profit corporations operating in New York to prepare new or revised bylaws, which are essential organizational documents. In addition to a discussion of legal and practical issues, it contains questionnaires and sample documents. Throughout the reporting period, we used the tools and guidance in this publication to enhance Lawyers Alliance’s trainings and pro bono clinics for nonprofit staff and directors, volunteer attorneys, and other legal professionals.

Our new and updated legal alerts, widely distributed online, were an effective way to reach people wherever they were working or learning. Examples include the 4/25/23 alert “The Private Benefit Doctrine: Practical Considerations for Nonprofits”; the 7/11/2023 alert “Audit Committees of New York Nonprofits”; and the 10/24/23 alert “Governance Policies and Procedures: Keeping Up With Good Governance for New York Nonprofits.”

TECHNOLOGY

We continued to make significant improvements to our recently upgraded Case Monitoring System, designed to improve the effectiveness and efficiency of our quality control. Our system, including an upgraded web-enabled database, helped us generate inquiries to, and automatically populate our database with responses from, the primary client and volunteer contact on each pro bono legal matter, produced useful dashboards; and generated alerts to help staff triage questions and requests for staff assistance. We in turn refined our internal procedures for staff follow-up with clients and volunteers. This upgrade saves staff resources and improves the timeliness and quality of our communications with clients and volunteers.

We conducted a cybersecurity review that resulted in updating protocols and security improvements to our website. We updated our business continuity, incident response, and disaster recovery plans for technology operations. We continued regular cybersecurity training and anti-phishing testing for staff, and upgraded several computers and other technology equipment.

IOLA TECHNOLOGY GRANT

With 2023 IOLA Technology Grant (the “Grant”) funds and other support, we undertook several projects and made purchases in order to improve the security and infrastructure of our network and systems, including those bulleted below. The Grant funding is noted in parentheses.

- Cybersecurity insurance premium renewal. This coverage, fully paid in October 2023, prepares us to respond to security incidents, and also comes with a monitoring service that alerts us of potential network vulnerabilities, which we can then resolve. (\$2,928 = half of 12-month premium.)
- Hired a consultant to set up a VPN (virtual private network) for our network. This improved the security of users' remote connections.
- Hired a consultant to upgrade our server operating system (\$7,072 of \$9,572 spent in November 2023, January 2024, and March 2024). Made additional small hardware and software purchases related to this upgrade. This upgrade was required as Microsoft ended support on the previous operating system.
- Training of staff on cybersecurity including KnowB4 subscription.

PRO BONO VOLUNTEERS

Lawyers Alliance's staff-supported pro bono program enables volunteers to use their skills efficiently and effectively. The model incorporates four essential elements for maximum impact: client outreach, client screening, volunteer support, and volunteer recognition. During the reporting period, 2,371 pro bono attorneys from a network of 142 law firms and corporations were engaged in legal matters. We utilized multiple strategies to mobilize volunteer capacity, skills, and interest:

- **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 volunteer-oriented events. Corporations were an increasingly important source of volunteers as we enhanced limited scope and specialized subject matter opportunities for in-house legal counsel.
- **Expertise and Support on Nonprofit Legal Issues:** Staff attorneys vetted legal clients and legal matters, answered volunteers' questions, and served as co-counsel on cases placed with volunteers.
- **Model Documents, Educational Programs, and CLE Offerings:** Pro bono attorneys had access to Lawyers Alliance's research outlines, model documents, and

2,643

attorneys volunteered 56,434 hours

10

law students volunteered 2,520 hours

4

other volunteers volunteered 1,565 hours

other training materials. During the reporting period, we provided 5Lawyers Alliance CLE trainings to a total of 92 attorneys. CLE presentations by our staff attorneys also included September 2023 “Ethical Considerations for Attorneys Working with Nonprofit Organizations” in conjunction with the Practising Law Institute (PLI) and March 2024 “Ethics of Lawyers Serving on a Nonprofit Board of Directors” presented at the NYC Bar.

- **Law Students and Interns:** Law students participated in a summer program and semester projects focused on intake, legal research and analysis, and communicating with clients and volunteers about case progress. We are currently hosting a Hagedorn Nonprofit Intern from Baruch College.
- **Recognition:** The November 2023 Cornerstone Awards and Pro Bono Month stories saluted all volunteers, with special awards to 13 individuals and 3 institutions for extraordinary service. During Pro Bono month we sent and posted a LinkedIn message thanking our volunteers and giving our community an opportunity to honor a volunteer by donating in their honor. We publicized 4 special Volunteer Accomplishments about law firms and volunteers via our website, Probono.net, and email announcements. We also acknowledged volunteers who have provided a year of service with thank you messages and certificates of appreciation.

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 the New York City Charter School Center (presenting a webinar on 2/1/2024 on “Understanding Leave Laws and Accommodations in New York: A Comprehensive Guide for Charter Schools”) and the Staten Island Not-for-Profit Association (attending their annual conference on October 19, 2023 and presenting a live training entitled “Working Together: Legal Issues for Advocacy Coalitions”). Among New York City technical assistance providers, we collaborated with and exchanged referrals with Association of Nonprofit Specialists, Cause Effective, Community Resource Exchange, BDO FMA, Nonprofit New York, and Support Center for Nonprofit Management.

Significant collaborations have also been a critical part of our nonprofit advocacy work, with important results in the reporting period. In spring 2023 we continued our work with the New York Association of Training and Employment Professionals to prevent passage of overbroad legislation making it harder to form, amend, dissolve and govern workforce development and other nonprofits. This time, we successfully persuaded the bill’s sponsors to introduce an amended version (S2727-A/A3715-A) deleting the provisions affecting most of our clients. Other collaborations include partnering with legal services programs and bar associations to preserve IOLA funding, working with Nonprofit New York and others to exempt 501(c)(3) organizations from the \$5,000 expenditure threshold that triggers an obligation to register as a lobbyist, and working with Human Services Council and others on concerns related to the State’s Master Contract for Grants.

CIVIL LEGAL SERVICES FUNDING

\$ 3,991,132.00

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|------------------------|------------------------|
| City and County | \$ 39,915.00 |
| IOLA Funding | \$ 197,500.00 |
| Foundations | \$ 850,450.00 |
| Federal Funding | \$ 150,000.00 |
| Fundraising | \$ 1,133,243.00 |
| Other | \$ 1,620,024.00 |

