

# **PRO BONO PARTNERSHIP**

---

**2023 – 2024**

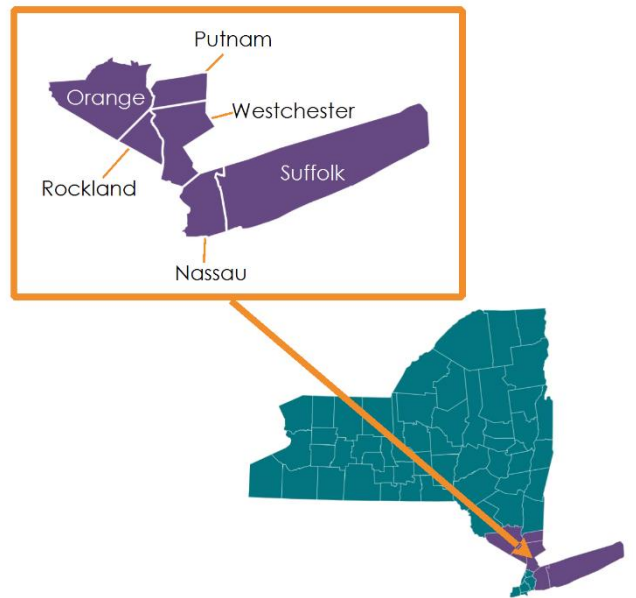
**Report**

# OVERVIEW OF ACHIEVEMENTS

**Number of People and Organizations Benefited:** Pro Bono Partnership does not assist individuals. During the grant period, we assisted 308 New York nonprofit organizations on direct legal matters, answered Legal Resource Helpline queries from at least 205 New York nonprofits, and recruited and supported 903 legal volunteers from New York. We also offered 49 education programs, many of which were held in collaboration with other community organizations; these were attended by over 1,982 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 County and nonprofits in Albany, Columbia, Dutchess, Orange, Rensselaer, Schenectady, and Tompkins Counties.

Nonprofits in the target population can apply to become clients of the Partnership if they serve disadvantaged, underserved, or historically marginalized populations and/or provide services that enhance the quality of life in their communities; have legal needs that we can address; and are unable to pay for legal fees without substantially impacting program resources. Our Legal Resource Helpline and education programs (including workshops,



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

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

**Staffing Full Time Equivalents:**  
 Total Staff: 20.3    Others: 10  
 Lawyers: 10.3

webinars, Legal Alerts, and website resources) are available to anyone, regardless of whether they are affiliated with a client organization.

In our 2023 client survey, administered in February 2024, 98% of respondents reported that they served low-income individuals (those with incomes below 125% of the federal poverty line) in some capacity. Over half of respondents reported that 50% or more of their constituents were low income. Nearly half of respondents reported that 50% or more of those they serve identify as members of a racial minority, and 35% reported that at 50% or more of those they serve are members of another kind of underserved community (such as refugees, veterans, people who are differently abled, or people who identify as LGBTQ).

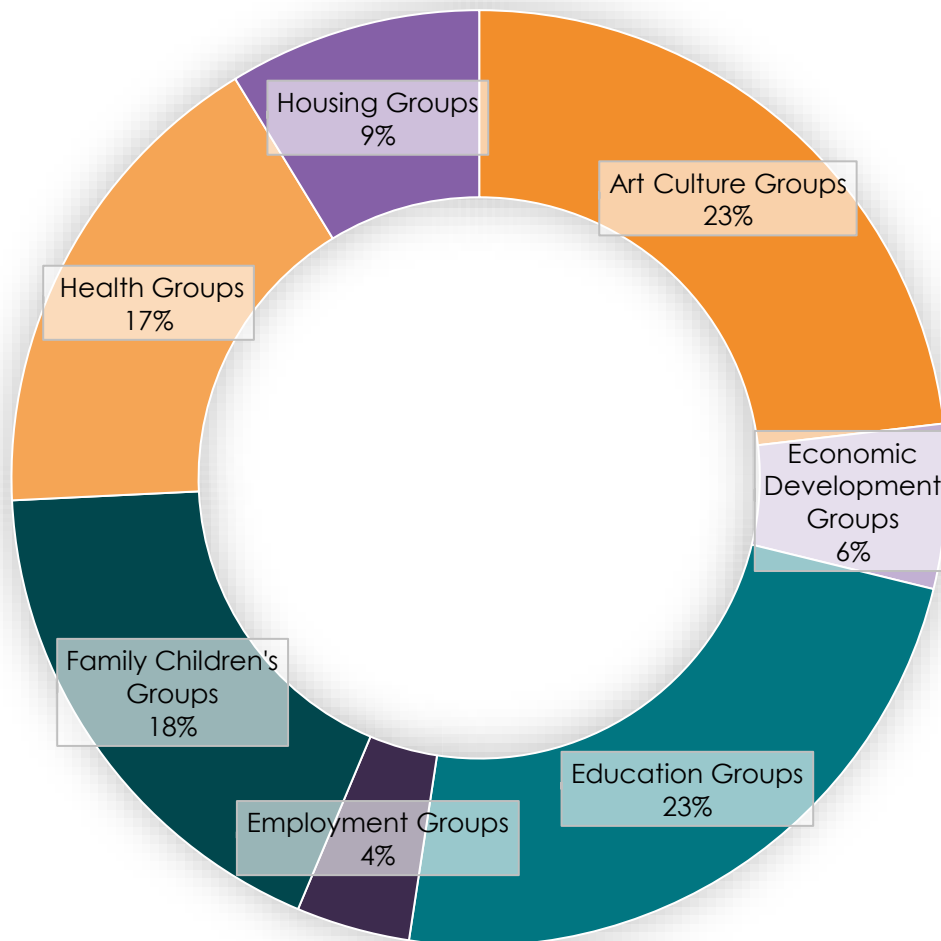
**Dollar or Other Benefits:** The value of the legal services we provided to New York nonprofits during the reporting period is approximately \$9.4 million. With a relatively small staff and budget, we provide an extremely valuable service to a large number of nonprofits serving the most vulnerable in our communities.

**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.

**Significant Improvements in Your Program's Capacity to Deliver Services (e.g. technology, offices, staff, etc.):** The pandemic caused the unexpected closure of all of our offices in March 2020. Our service model adapted well to the remote work environment, demonstrating that staff could effectively assist clients and volunteers while working outside the office. In fall 2022, our main office in White Plains was downsized to a smaller space, at significant savings. In 2023, most staff returned to the office on a hybrid schedule, while others continued to work fully remotely. Going forward, staff will deliver services through a mix of remote and in-person work. While much of our work can be done remotely, certain activities, particularly client and volunteer outreach, continue to be conducted in-person whenever possible.

# DIRECT SERVICES FOR NON-PROFIT CORPORATIONS AND OTHER GROUP ENTITIES

**308** non-profit or group entities participated received assistance through **1,313** cases closed



Types of Groups Represented

## OTHER LEGAL-RELATED SERVICES

### 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 26 years, our staff attorneys have answered more than 19,000 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 452 Legal Resource Helpline queries from at least 205 New York nonprofits. To access the Legal Resource Helpline, non-clients may call any of our offices or email [information@probonopartner.org](mailto:information@probonopartner.org). Existing clients may call or email any staff attorney with whom they have previously worked. For example, Yes She Can Incorporated utilized the hotline to discuss a conflict of interest policy.

12,165

people  
benefited  
from

Community  
Legal  
Education

**Direct Legal Services:** Nonprofits that serve the disadvantaged and/or provide essential services, have 501(c)(3) status or are seeking 501(c)(3) status, and are unable to pay for legal fees without substantially impacting program resources, can apply to become clients of the Partnership. If the nonprofit's application is accepted, a staff attorney is assigned to the matter, often working with a volunteer attorney with relevant expertise from a law firm or corporation. On matters that are assigned to volunteers, a staff attorney provides support and tracks each matter to ensure a timely and appropriate conclusion. The Partnership assists with transactional legal matters including but not limited to tax exemption, mergers, governance, real estate, insurance, and volunteer management. For example, the Food Bank Association of New York State received assistance in 2024 with an employment matter.

**Educational Initiatives:** The Partnership's staff and volunteer attorneys annually provide numerous educational workshops and webinars for nonprofits to help staff and board members identify pertinent legal issues, adopt best practices, and avoid potential crises. We are offering both workshops and webinars in 2024. For example, we offered a webinar in March of 2024 on Cultural Flashpoints in the Workplace. Publications on legal issues for nonprofits are also freely available on our website. Resources are updated on our website and shared with nonprofits via email and social media. The Partnership also sends out Legal Alerts via our email, notifying our newsletter subscribers of any relevant changes to the law.

# TECHNOLOGY

During the reporting period, we focused on sustaining and improving our capacity to deliver services in the remote/hybrid work environment. We purchased four laptops to replace outdated ones, and to ensure all staff are using approved data security. Towards the end of the grant period, we contracted with a new IT company and have already made updates that have enhanced efficiency and reduced down time.

Over the course of the last two years, a staff Salesforce committee worked to recommend and create new processes, tools, and internal trainings to optimize our use of Salesforce for program and development data management. One of these tasks involved the formal documentation of administrative and program procedures, which enabled clients and volunteers to have the same experience with the Partnership regardless of which regional program they work with. The committee held staff trainings on the use of our Salesforce database, including best practices and processes, as well as customizing fields to make data entry more streamlined, and migrating the organization from Classic to Lightning, which improved performance; they also trained more cross-users on our marketing platform, Account Engagement, in addition to creating email templates that can easily be used by staff members. The committee also created a suite of customized and standardized reports to make data more accessible to all staff, and holds a weekly Salesforce office hour for any staff member who has a question about how to utilize this resource.

## IOLA TECHNOLOGY GRANT

The Partnership utilized the 2023 Technology Grant to make significant improvements to its website, which was built in 2015 and had lost some of its functionality. These improvements made possible by IOLA's grant have elevated communications for the entire organization and have had particularly positive impact for the New York program, which supports more volunteers than our other two programs, and often refers members of the public to resources that we make available online. In January 2024, the Partnership's updated website became live with a design refresh and improved functionality. Now publications are searchable by keyword, volunteer opportunities are more easily managed, and the process for registering for webinars is more intuitive.

The grant supported the Partnership's work with a consultant who made the design updates and enhancements, improving the functionality and accessibility of information on the Partnership's site. This grant enabled the Partnership to update the responsive website design theme with new templates for the home page and secondary pages, new headers, buttons, and other graphic elements. We improved access to the publications and webinars resource library with category sorting and search features. The volunteer opportunities request feature also has improved category and search capabilities. Additionally, volunteer requested matters are automatically updated with Salesforce, so the process is more streamlined and less reliant on manual administration. Our website consultant integrated site content updates, finalized the approved site, and provided instruction for using new WordPress features. This project also included updated and enhanced e-commerce functionality to facilitate online donations and event registrations. The contractor also integrated the site with our Salesforce account, documented how to use and update the new site, updated the Request for Legal Assistance form, enhanced the site's mobile viewing, set up email notifications, fixed bugs, and other web support.

## PRO BONO VOLUNTEERS

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.

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 Practicing 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. During the reporting period, Program Director Maurice Segall was a panelist for PLI's CLE program "Ethical Issues in Pro Bono Representation," and Senior Staff Attorney Judy Siegel co-chaired and presented "Attorneys Serving on Boards" for PLI.

Senior Staff Attorney Judy Siegel, in her role as Chair of the Nonprofit Law Committee of the New York State Bar Association, made CLE ethics presentations as part of several New York State Bar Association presentations. Program Director Maurice Segall and Senior Staff Attorney Judy Siegel also made a CLE ethics presentations for Regeneron Pharmaceuticals and for Skadden, Arps, Slate, Meagher & Flom LLP. We 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. Program Director Maurice Segall presented for the Westchester chapter of the Association for Corporate Council, and Senior Staff Attorney Judy Siegel presented at the New York State Bar Association meeting.

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. One of these students volunteered with the Partnership in 2023. We often 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.

**902**attorneys volunteered **18,491** hours**1**law student volunteered **400** hours



# SIGNIFICANT COLLABORATIONS

Our most significant collaborations are with the corporate legal departments and law firms that provided the 903 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. Staff have largely resumed attending and offering in-person events and programs.

# CIVIL LEGAL SERVICES FUNDING

**\$ 3,143,803**

|                      |                     |
|----------------------|---------------------|
| <b>IOLA Funding</b>  | <b>\$ 152,899</b>   |
| <b>Foundations</b>   | <b>\$ 338,650</b>   |
| <b>Fundraising</b>   | <b>\$ 2,256,692</b> |
| <b>State Funding</b> | <b>\$ 34,250</b>    |
| <b>Other</b>         | <b>\$ 361,311</b>   |

