



Grantee Activity Report (GAR) Instructions

Fiscal Year 2026

The Grantee Activity Report is to be submitted via SmartSimple on or before May 1, 2026.

If you have questions about any of this content, please contact the IOLA program team.

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This Narrative Report covers your organization's activities and achievements in New York State during the 12-month grant period ending March 31. Do not submit a Quarterly Progress Report for the period January 1 - March 31. Consider the following information when completing the GAR.

1. You will upload in SmartSimple a Word version of Part I. Use Times New Roman, double-spaced, 12-point font, and adhere to posted page limits. Reports not following those standards may be returned for correction, resulting in delayed payment. Part II will be completed in web form. Please refer to the SmartSimple User Guide in the “Help and Support” section of your SmartSimple portal for more information.
2. Except where otherwise indicated, report your total New York civil legal services program, not just the portion that is attributable to your IOLA funding, and not just the services provided to clients falling within IOLA or other funders’ (e.g., LSC) eligibility requirements.
3. Add your organization’s name and the name and title of the contact person responsible for the content of the report (see top of page 3). Your Narrative Report should incorporate the lettered and numbered headers. If your organization or program does not provide the service described in a particular section, indicate “Not Applicable” and continue to the next section. The IOLA Fund does not expect that every grantee will have a substantive response to each section of the GAR.
4. All statistics you report should be based on recorded data. Where data are not available, use best estimates based on available program records and your professional judgment.
5. It is critical that any narrative references in Part I to case statistics, dollar benefits, funding, etc., match the figures reported in Part II of the GAR. Reports with conflicting data will be returned for correction, resulting in delayed payment.
6. IOLA may publish portions of your report (including any and all parts of your narrative and statistical reports) to government officials, the legal community, and the broader funding community. For the narrative examples of how your programs benefit low-income New Yorkers, use actual examples that illustrate the human impact of your work and that would be compelling to this audience. To aid with IOLA’s compilation of grantee summaries, please use the first-person plural “we” in the Part I narrative. Use plain language and avoid legalese. Do not disclose to IOLA your clients’ personally identifiable information or otherwise violate the attorney-client privilege.

PART I: NARRATIVE OF PROGRAM ACHIEVEMENTS

Organization:

Contact Person:

Title:

A. Program Overview (Limit: 3.5 pages)

1. Major Achievements

Provide a narrative summary of your program's major achievements during the reporting period. Note that any references to case statistics, dollar benefits, funding, etc. must match those figures reported in Part II of the GAR. Reports with conflicting data references may be returned for correction, resulting in delayed payment. Include the following information in this summary:

- Number of people who benefited from your services;
- Number of organizations that benefitted from your services;
- The primary target population;
- Financial or other benefits realized by low-income people as a direct result of your efforts;
- Increased access to justice or improvements in the administration of justice;
- Significant improvements in your program's capacity to deliver services (e.g., technology, offices, staff etc.)
- Any program achievements that produced significant savings for New York taxpayers and how you calculated that.

2. Outreach

Describe your program's outreach, which is the way you connect with your target populations. Please indicate whether and how technology was used for those efforts.

3. Remote Service Delivery

Describe civil legal assistance provided online or via telephone. This includes any systems for triage, advice/brief services, or referral.

4. Obstacles

Describe any significant obstacles or problems you encountered that affected your program's ability to achieve its goals. Indicate how your program addressed those problems, including significant changes in non-IOLA funding and staffing.

B. Direct Civil Legal Assistance to Individuals (Limit: 2 pages)

1. Client Intake

Describe your program's client intake, including whether and how technology was used in those efforts.

2. Typical Cases

Provide two brief narrative examples of typical cases that you might use in describing your program's services to the public. In each example, indicate the primary area of law.

C. Other Legal Related Services Provided to Individuals (Limit: 2 pages)

Complete this section only if your program reported on other legal related services to individuals in Part II, Section D (i.e., Community Legal Education, Pro Se Assistance, and Alternative Dispute Resolution) Do not include medical services, shelter, or other activities unrelated to civil legal services.

1. Overview of Other Legal Related Services

Provide a brief overview of the other legal related services, including goals, service delivery strategies, target population, and total number of people served.

2. Examples of Other Legal Related Services

Provide up to three brief examples of your program's other legal related services.

D. Groups: Civil Legal Assistance (Limit: 2 pages)

Complete this section only if your program reported on group representation in Part II, Section E. Where the work on a case or matter included more than one IOLA grantee, ensure that the numbers of cases and beneficiaries are not reported multiple times to the IOLA Fund in Part II, Section E.1. Each collaborator may describe the cases and beneficiaries in this narrative section.

1. List of All Impact Cases

Create a bulleted list of all impact cases, which are those that do the following:

1. Result in benefits for multiple claimants or have widespread implications beyond a single claimant; and
2. Achieve or are expected to achieve relatively permanent improvement in legal rights or basic living conditions of those affected.

Identify any other IOLA grantees involved in the case. Do not include any other details and abbreviate, if necessary.

2. Examples of Impact Cases or Other Group Entity Representation

Provide up to three brief narratives of impact cases or other group entity representation on which your program performed significant activity. For each narrative, include milestones (e.g., a court decision or settlement) and impacts (e.g., "25 families avoided homelessness," "75 individuals gained access to job training").

E. Collaborations (Limit: 2 pages)

Describe up to five of the most significant collaborations, e.g., highlighting new partnerships, that your organization has with other legal services providers, private bar organizations, law schools, or community-based organizations (including medical-legal partnerships, partnerships with Tribal or other indigenous communities, and referral and intake relationships). In your examples, address the following factors:

- a) How these collaborations help avoid duplication with other service providers, particularly other IOLA grantees; and
- b) How your organization supported LawHelpNY, including:
 - i. Whether you were listed;
 - ii. When the listing was last updated or reviewed;
 - iii. Financial or in-kind support contributed; and
 - iv. Participation in stakeholder or content collaboration meetings.

F. Pro Bono Attorneys, Law Students, and Other Volunteers (Limit: 1 page)

If applicable, describe your organization's recruitment, training, and deployment of private pro bono attorneys, law students, and other volunteers within your program. Summarize any significant achievements.

G. Training (Limit: 1 page)

How did you foster the professional development of your board and staff? Provide the following information without listing every training completed by your staff.

1. Describe significant training that your board and staff completed (e.g., the NYSBA's biennial Legal Assistance Partnership Conference).
2. Describe any new training initiatives.
3. Are your training priorities focused on new attorneys, managers, case handlers, non-attorneys, new board members, or staff wellness initiatives (not an exhaustive list)?

H. Technology and Other Innovations (Limit: 1 page)

If applicable, identify significant improvements in your organization's use of technology, communications, or other innovations, as well as the impact of those improvements. Use the following list as examples:

- Implementation of any new case management system, document management system, knowledge management system, AI tool, etc.;
- Any new or updated technology-related policies; or
- Any technology work related to IOLA's Justice Infrastructure Project.

I. Program Evaluation and Client Satisfaction (Limit: ½ page)

Describe any program evaluation efforts and client satisfaction surveys. Include frequency of evaluation/measurement (e.g., ongoing, annual), dates of most recent reports and results (e.g., percent of clients reporting highly satisfied). Additionally, upload to the Part I tab in SmartSimple any formal evaluation reports of your program completed during the reporting period (e.g., LSC Program Quality Report).

J. Additional Comments (Limit: 1 page)

Provide any additional comments that will help us understand your program, such as:

- Administrative or operational improvements;
- Significant contributions made to the overall access to justice community in New York State, e.g., delivering legal education, leadership and advocacy in access to justice initiatives, and technical assistance to other civil legal aid organizations; and
- Anticipated programmatic, fiscal, or staffing changes that may impact your program in the coming year.