



Atlanta
Legal Aid
Society

2017-2022 STRATEGIC PLAN

Approved: December ____, 2016

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I. THE MISSION AND VALUES OF ATLANTA LEGAL AID

Atlanta Legal Aid Society, Inc. was founded in 1924 by seventeen prominent Atlanta lawyers to provide free legal services for those who could not afford to hire an attorney. Since then, Atlanta Legal Aid has been assisting poor clients in Clayton, Cobb, DeKalb, Fulton, and Gwinnett counties with some of life's most basic needs—a safe place to live, enough food to eat, appropriate medical care, a decent education, and other necessities.

Atlanta Legal Aid has grown steadily over the years, thanks in large part to the strong support it continues to receive from lawyers in and around Atlanta. The program serves the five counties surrounding the city of Atlanta covering approximately 1,713 square miles. Last year Atlanta Legal Aid served more than **20,000** clients.

Our mission has given meaning and direction to all who have been involved with this organization during its 90-year history. That mission is:

To deliver legal services and legal education designed to improve the social, political, and economic conditions of low income persons; to serve as a catalyst for social change to benefit low income persons; to prepare and furnish information to low income persons about their rights; so as to provide full benefit, enjoyment, and protection of their legal, economic, political and social rights.

In short, we improve the lives of the poorest and most vulnerable in our society by providing them with first-rate legal services. Our success in the future, as in the past, will require that we remain focused on our mission, and the values that flow from it. These values have made Atlanta Legal Aid strong:

- We Value Helping Clients Meet Their Basic Human Needs. Our clients seek help with some of life's most basic needs—a safe place to live, enough food to eat, appropriate medical care, a decent education, and other necessities. Assisting them with these problems is at the heart of what we do. We value not only helping clients with their urgent legal matters, but also providing holistic legal services.
- We Value Making a Difference One Client at a Time. Our high impact cases are derived from our ordinary clients who face specific problems that we work to resolve on their behalf. We provide high-quality representation for our clients and, if that involves taking the case to the U.S. Supreme Court and establishing a major precedent, so much the better, because that means other clients will not have to face the same problem in the future. Regardless of the impact that any given case might have, our work is grounded in helping individual clients with their everyday legal problems.
- We Value Having Flexibility to Meet Clients' Unforeseen Needs. Flexibility is an important value for an organization with limited resources and seemingly limitless client needs. It is particularly important when unforeseen legal problems suddenly affect a large number of our low-income clients. Atlanta Legal Aid has faced such situations in the past (*e.g.*, the Marielito Cubans, foreclosure crisis victims, children with disabilities, Social Security benefit terminations, etc.) and knows how to shift its focus quickly and organize an effective response.
- We Value Developing Innovative Models That Others Can Use. Atlanta Legal Aid has a track record of innovation to improve the delivery of legal services to the poor. As discussed in more detail below, these innovations include the Senior Hotline, the Cancer Project, the Health Law Partnership and the Enhanced Services Project. Our new initiatives are evidence based, data driven, client focused and sustainable. Atlanta Legal Aid also has been a pioneer among legal services organizations in employment practices, such as the student loan forgiveness program and the Senior Attorney and

Senior Paralegal programs, among others. We also have been an innovator in the area of resource development, having founded The Fundraising Project in 1988, which continues to be a resource for fundraising for legal aid programs nationwide. Many of our ideas have become models for other legal services agencies across the country.

- We Value Volunteers. We value the innovative use of volunteers to further our mission. Innovative programs, such as the Enhanced Services Project, Cobb Justice and the creation of a program-wide pro bono director, draw in private bar members to contribute to the program and to serve our clients.
- We Value Collaboration. While serving our own clients is our top priority, we also value being able to help other organizations better serve their clients. We serve as an “anchor nonprofit”, leveraging our institutional status to facilitate partner legal services agencies institute programs of their own.

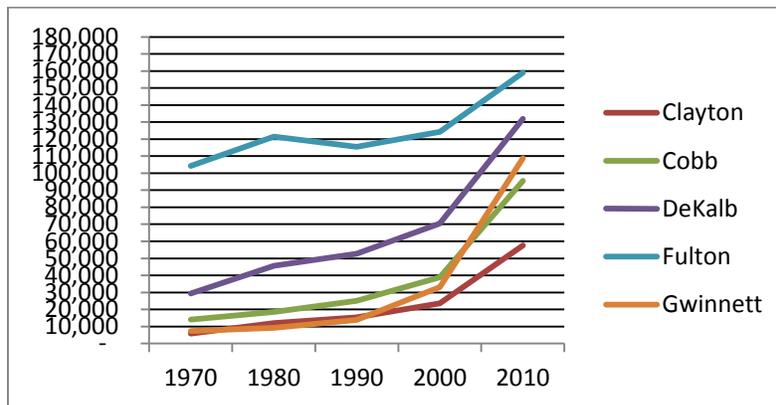
II. ENVIRONMENTAL SCAN

This environmental scan addresses seven areas: (1) current poverty statistics for Atlanta Legal Aid’s service area; (2) client representation and scope of services; (3) private bar involvement; (4) funding; (5) personnel; (6) facilities and technology; and (7) Board involvement and stewardship.

1. Current Poverty Population

Atlanta Legal Aid’s clients and their needs have changed dramatically over the years. For instance, the 2010 census data confirmed what we already knew from our client contact—the poor population living in metropolitan Atlanta had increased dramatically since 2000 (almost 91% in our five-county service area). This trend continued through the first half of that decade and has remained high in the current decade. Census data released at the peak of the recession in January 2012 indicated that Georgia had one of the highest increases in poverty of any state in the country and that the Atlanta area’s increases were almost three times the national average.

The population living at or below poverty level in the Atlanta Legal Aid service area has increased dramatically since the 1970s, with the most rapid growth occurring between 2000 and 2010.

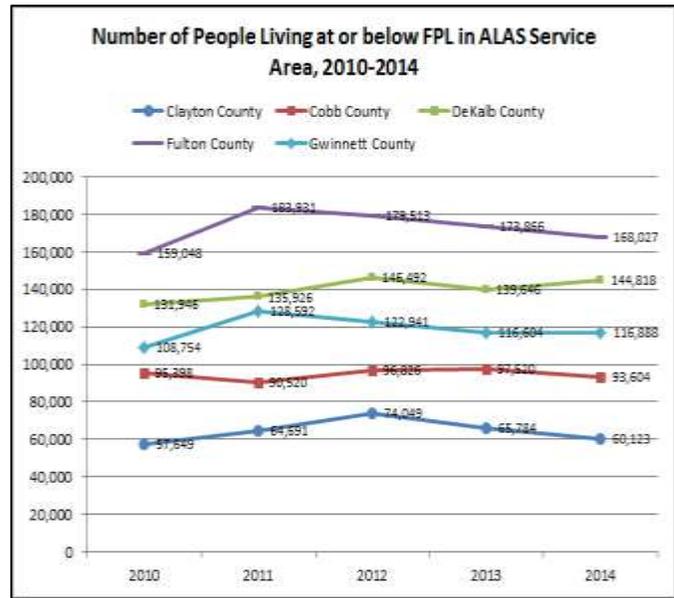


Data Source: U.S. Census Bureau Statistics

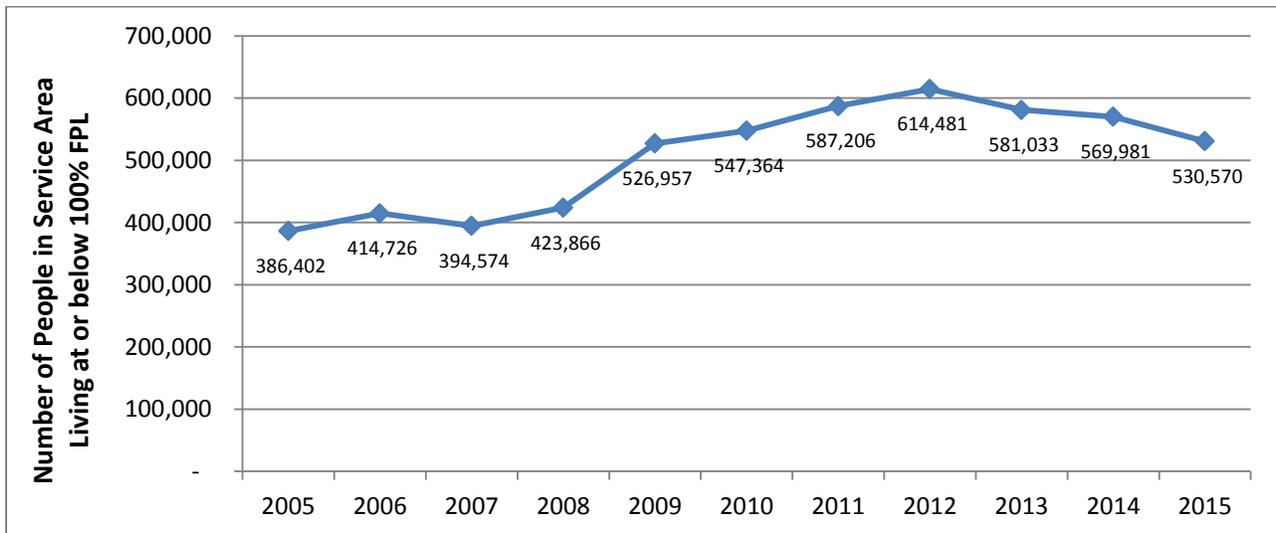
Much of the increase in the poor population occurred outside Atlanta, whose in-town neighborhoods are experiencing gentrification and a growing number of middle class households. At the same time, the poor population is rapidly expanded in formerly suburban and rural counties of Clayton, Gwinnett, Cobb, and DeKalb.

Georgia’s recovery from the “Great Recession” has meant that poverty rates have stopped increasing dramatically, and have even improved slightly since the recession peaked in 2012. However, poverty rates in metro-Atlanta remain close to their recession peaks and remain greater than the national average. U.S. Census Bureau Small Area Income and Poverty Estimates (SAIPE) showed an overall increase in the number of people living at or below the federal poverty level in the Atlanta Legal Aid service area between 2010 and 2014.

Geography	2010 Poverty Estimates	2014 Poverty Estimates	Change in People below FPL 2010-14	Percent Change in Poverty 2010-14
United States	46,215,956	48,208,387	1,992,431	4%
Georgia	1,698,004	1,802,783	104,779	6%
Clayton County	57,649	60,123	2,474	4%
Cobb County	95,398	93,604	(1,794)	-2%
DeKalb County	131,946	144,818	12,872	10%
Fulton County	159,048	168,027	8,979	6%
Gwinnett County	108,754	116,888	8,134	7%
Legal Aid Service Area	552,795	583,460	30,665	6%

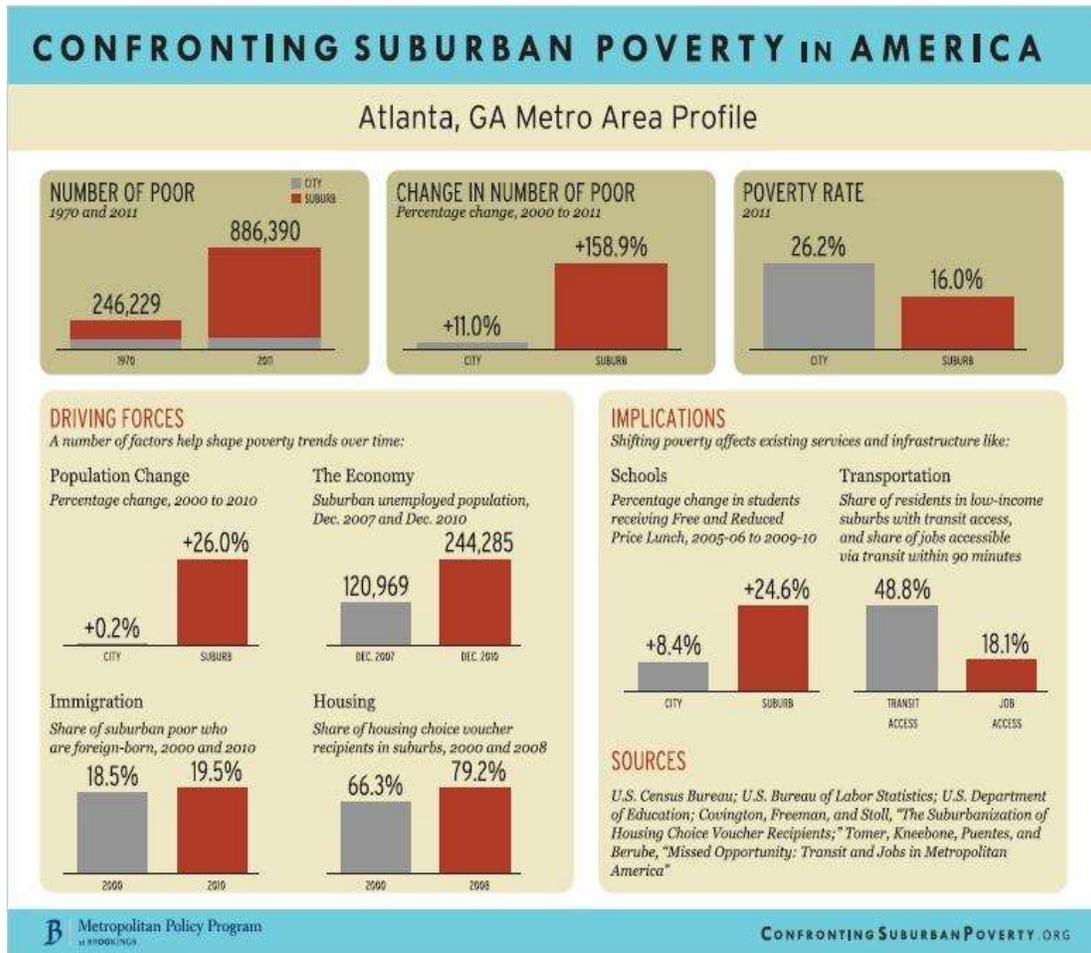


American Community Survey (ACS) data are consistent with SAIPE figures describing the Atlanta Legal Aid service area, indicating a 37% increase in the number of people living at or below poverty level over a 10-year period, from 386,402 in 2005 to 530,570 in 2015. While not the extraordinary 91% increase we saw from 2000-2010, a 37% increase is still dramatic and exceeds the national average.



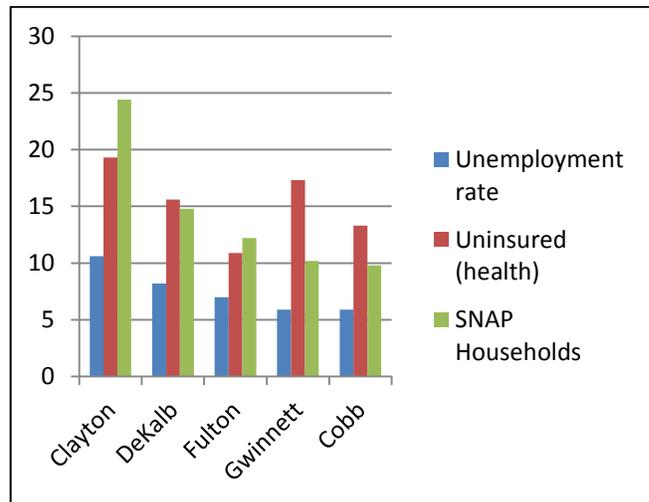
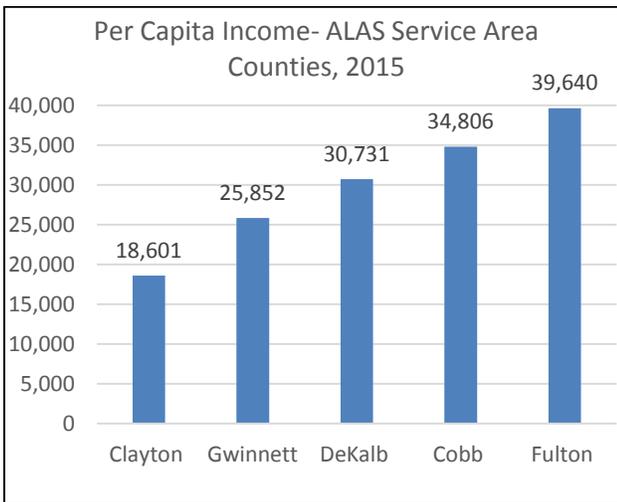
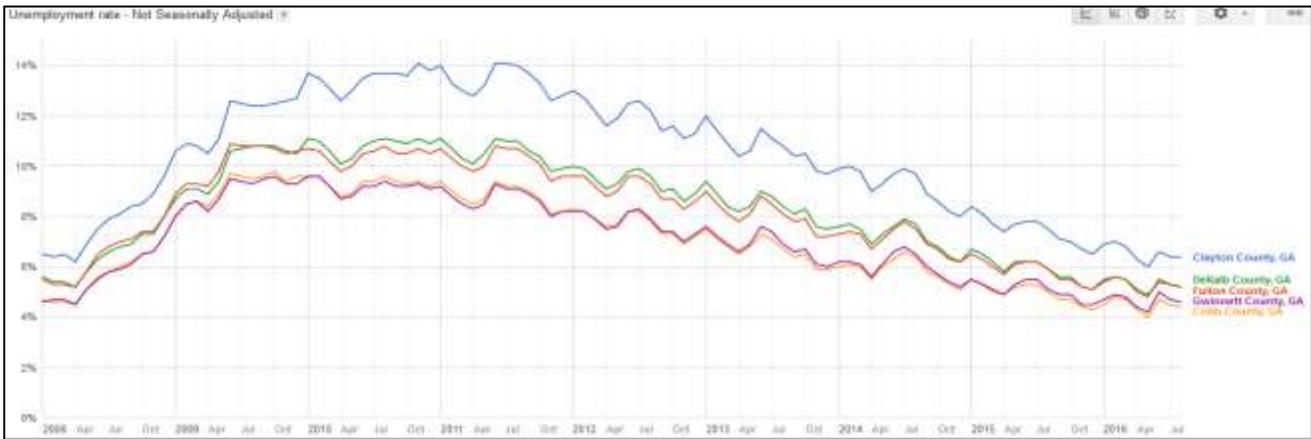
Confronting Suburban Poverty in America, a report from the Brookings Institution released in 2016, confirms a national trend that matches what Legal Aid has seen in our own service area—“Following the recession, the number of poor people living in concentrated poverty in suburbs grew nearly twice as fast as in cities.” In the

2000s, the poverty population in the suburbs grew twice as fast as the growth rate in cities. One major factor is the substantial increase in affordable housing in the suburbs. By the end of 2010, roughly half of voucher households lived in the suburbs; a huge shift from the concentration of poverty in the housing projects of urban populations. While the majority of Legal Aid’s clients still live in the more urban counties of Fulton and DeKalb, the dramatic poverty population growth rate in Clayton, Cobb and Gwinnett Counties warrants consideration of where future resources will be spent.



Credit: Metropolitan Policy Program at the Brookings Institution

Among Atlanta Legal Aid service area counties, the suburb of Clayton County has the lowest per capita income, the highest unemployment rate, and the highest percentage of households receiving SNAP benefits. Nearly a quarter of Clayton County households receive Supplemental Nutrition Assistance Program (SNAP) benefits. Clayton’s percent of households receiving SNAP is at least double that of each Cobb, Gwinnett and DeKalb. Georgia Department of Education Free or Reduced Price Lunch data show that at least 95% of Clayton County school district students are eligible for free or reduced price lunch. This is the highest percentage of students per school district corresponding with the Atlanta Legal Aid service area.



Growth in Immigrant Population

Immigrants face additional barriers and challenges, and are disproportionately represented in the poverty population. The rapid increase in the immigrant population living in Atlanta Legal Aid’s five-county area has been significant. For instance, the Hispanic population in Gwinnett County rose from 11% in 2000 to 20% in 2010. In fact, the 2010 census determined that more than 22% of Atlanta’s five-county population speaks a language other than English at home, and the percentage is even higher in Gwinnett County – nearly 33%. These census figures are a sobering reminder of the challenge we face in meeting the needs of a rapidly expanding client population. The precise needs of this population may depend on what happens with the various “immigration reform” bills now before Congress.

Atlanta Legal Aid currently operates the Hispanic Outreach Law Project, which serves Spanish-speaking clients throughout metropolitan Atlanta. Staffed by at least one Spanish-speaking attorney and paralegal in each office, the Hispanic Law Project served more than 2,300 households in 2015. The main source of funding for this project since its inception has been the Goizueta Foundation. Our experience serving this population allows us to have a timely response to refugees and unaccompanied minors eligible for our services.

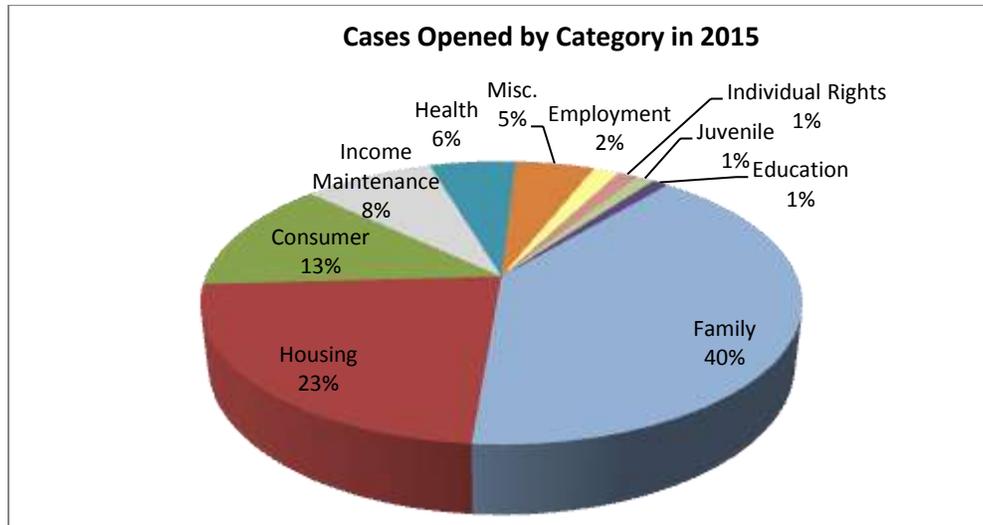
Serving Asian immigrants is complicated because of the many different languages and dialects that they speak. Atlanta Legal Aid has staff who speak Romanian, Korean, Cantonese, and Mandarin. For the numerous other Asian languages our clients speak, the program uses outside language services. Our staff language skills also

include American Sign Language, French, German, Gujarati, Hebrew, Hindi, Portuguese, Romanian, and Urdu. Atlanta Legal Aid currently contracts with Optimal for brief translations by telephone in any language, but depositions, court appearances and even long conversations require the use of certified translators.

2. Client Representation and Scope of Services

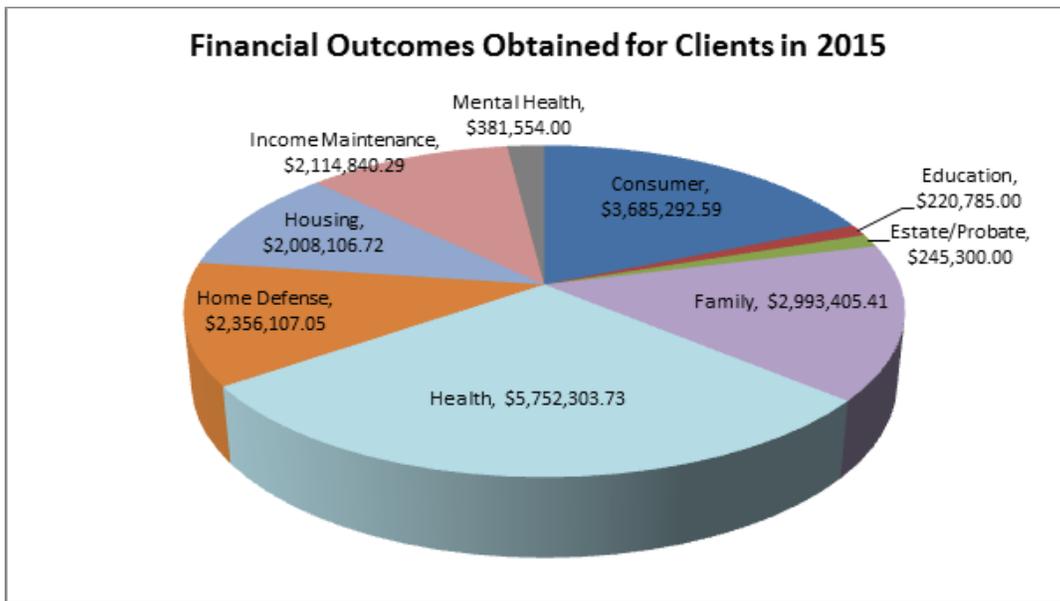
Core Client Cases and Recent Successes

The following is a summary of the cases handled in 2015:



Atlanta Legal Aid Society continues to help protect children and families from violence, gain stability through adoption, visitation, custody, guardianship or legitimation, and ensure educational opportunities for children with special learning needs. In 2015, Atlanta Legal Aid's work resulted in:

- over \$1.5 million in child support ordered
- 991 adults and children being protected from violence
- 1,104 family members who obtained family related stability through adoptions and child custody and parental visitation orders
- \$220,785 in special education services secured
- \$447,291 in unemployment benefits secured for low-income workers.
- \$445,728 secured in Food Stamps/SNAP Benefits and retained or secured
- \$764,718 in Social Security, SSD and SSI Benefits retained or secured
- \$2.6 million in ongoing health benefits
- \$3 million in skilled care and personal care benefits among elderly clients and persons with disabilities
- 49 homes saved from foreclosure
- over \$895,000 in equity preserved and eliminated over \$1,045,000 in mortgage debt
- \$1,302,400 in Section 8 housing benefits secured



For the past thirty years, Atlanta Legal Aid has creatively developed new ways to provide legal services to certain targeted populations and to address specific legal issues important to the community at large. While continuing to serve clients in the traditional areas of family law, housing law, healthcare-related law, benefits law, and consumer finance law, Atlanta Legal Aid also has added projects that directly respond to the changing needs of its growing client base and allow for diversification of funding sources. Not only have these projects been sustained since their inception, they have been expanded. These special projects include:

- The **Senior Citizens Law Project** (1975) provides legal representation to people over the age of 60, whose problems often involve access to government income benefits and access to healthcare. Cases of senior abuse, neglect, and financial exploitation are also given high priority.
- The **Disability Integration Project** (1988) advocates for people with disabilities who live in institutions, who are at risk of institutionalization, or who have long term needs to obtain the supports they need to live full integrated lives in the community. Atlanta Legal Aid is nationally known for its advocacy in this area, including successfully litigating the U.S. Supreme Court case *Olmstead v. LC*, which is the most important civil rights decision for people with disabilities in our country’s history; advocating for full implementation of *Olmstead* during landmark litigation by the U.S. Justice Department in Georgia; and ensuring successful implementation of a major federal program that is enabling Georgia men and women to return to the community from nursing facilities. Through our work, state service infrastructures are transforming from institution-based systems to community-based systems for people with significant disabilities in Georgia and throughout the country.
- The **Home Defense Program** (1989) provides legal representation to low-income homeowners victimized by home equity and home purchase scams, including predatory mortgage lending. The Home Defense Program clients are long-time homeowners, elderly and/or disabled, living on very modest retirement or disability checks, as well as families experiencing layoffs or substantially reduced wages due to the economic downturn. The project saves clients’ homes by stopping or rescinding foreclosure sales, cancelling mortgage loans, restructuring mortgage loans with lower balances, interest rates, and monthly payments, assisting with loan modification, and negotiating short payoffs of mortgage loans using reverse mortgage proceeds for senior homeowners. The project is nationally recognized as a leader in the fight against predatory lending. Atlanta Legal Aid attorneys have been called the “canaries in the coal mine” for predicting years ago the

recent mortgage meltdown, and our attorneys work closely with the Consumer Financial Protection Bureau to help prevent predatory mortgage lending and contracts for deeds.

- **The Health Law Unit: AIDS Legal Project/Cancer & ALS Initiative/Breast Cancer Legal Project** (1989) provides comprehensive and compassionate legal services that have a direct impact on health and quality of life to low-income persons living with, or affected by, a serious health condition with a special focus on cancer and AIDS. The unit assists clients who encounter a wide range of illness-related legal issues that are barriers to care and affect the clients' ability to focus on treatment and wellness. Issues can include employment rights, insurance issues, access to public benefits, income maintenance, securing safe and stable housing, preparing wills and advance directives and transgender outreach.
- **The Hispanic Outreach Project** (1991) advises, refers and represents Spanish-speaking clients. This work is crucial in light of the recent dramatic population increase among low-income people in Gwinnett County, which includes a large percentage of Spanish-speaking people. Through this project, Atlanta Legal Aid now has a Spanish-speaking attorney and paralegal in each office to provide services to clients in their native language regarding every day legal matters and in some circumstances, immigration matters.
- **The Grandparent/Relative Caregiver Project** (1997) provides advice on options for grandparents or other relatives to establish a legal relationship to the children in their care, who have frequently been abandoned by their parents. The project assesses the impact that the legal relationship will have on each family's public benefits and advises the caregivers accordingly. The project recruits and trains private lawyers to handle adoptions on a pro bono basis and serves as backup to them throughout the case.
- **The Georgia Senior Legal Hotline** (1998) provides free legal advice, brief service, self-help materials, and referrals over the phone to Georgians 60 years of age and older and to relative caregivers regardless of age. This innovative project provides services state-wide and has no financial eligibility restrictions. Any Georgia senior can access this resource. The hotline provides an excellent opportunity for pro bono volunteers and boasts participation by recently retired judges and attorneys. The Hotline serves all of Georgia and is not limited to metropolitan Atlanta. The callers seek advice on every conceivable area of law, and the Hotline staff and volunteers are true general practitioners. The Hotline staff screen every caller for potential home loan problems.
- **The Health Law Partnership (HeLP)** (2005) is our collaboration with Children's Healthcare of Atlanta and Georgia State University's School of Law, which combines medical and legal services to improve the health and well-being of low-income children. HeLP has legal offices onsite at all three of Children's Hospital campuses—Children's at Egleston, Children's at Scottish Rite, and Children's at Hughes Spalding. This interdisciplinary community collaboration between healthcare providers and lawyers aims to improve the health and well-being of low-income children and their families by addressing the multiple determinants affecting children's health. HeLP is also an educational partnership to promote the public's health through interdisciplinary teaching and learning. HeLP seeks to foster knowledge, understanding, and a cooperative spirit between the healthcare and legal professions.
- **The Enhanced Services Project** (2015) offers volunteers new ways to make a limited commitment to clients without going to court. The project utilizes volunteer attorneys to call back a client and do a brief follow up on limited matters - completing an advance directive, applying for a public benefit or getting a loan modification on a mortgage. The project began for clients who called our senior legal hotline. Building on this success, the project is expanding throughout the entire program and has a 90% success rate.

Service Beyond Our Traditional Five-County Service Area

The Legal Services Corporation funds two grantees in Georgia—Atlanta Legal Aid, which focuses its efforts in Fulton, DeKalb, Cobb, Gwinnett, and Clayton counties, and Georgia Legal Services Program, an independent nonprofit that serves Georgia’s other 154 counties. Atlanta Legal Aid welcomes opportunities to collaborate with Georgia Legal Services Program to serve all Georgians. For example, in 2000, the organizations together launched GeorgiaLegalAid.org, a multi-lingual website designed to help low-income Georgians solve common legal problems related to family, consumer, housing, education and other areas of law. The site was honored in 2007 with a Webby award from the International Academy of Digital Arts and Sciences.

Atlanta Legal Aid does not ordinarily seek to serve clients outside of our core programs in the five-county area, but we will consider doing so—and have approved such projects in the past—where the additional services will advance our mission and values, can be provided at nominal additional cost (*e.g.*, with dedicated funding), and will serve a need that cannot be adequately served with more local resources.

When opportunities arise, we leverage our funding opportunities to provide services outside metro Atlanta through support for partner organizations. In 2015, we utilized special funds from the Georgia Bar Foundation to collaborate with the Georgia Heirs Property Law Center to provide services to seniors outside metro-Atlanta. We plan to expand this support to other non-profits. In 2016, Atlanta Legal Aid’s Health Law Partnership worked with staff from Georgia Legal Services Program to help launch a medical-legal partnership in Macon.

We are mindful that our largest funding source—the Legal Services Corporation (“LSC”)—grants funds based on poverty population statistics in the five counties only. While we are not prohibited from using LSC funds to serve individuals living outside of the five-county area, the LSC funding formula does not include funding outside of our service area. Similarly, two other significant sources of our funding—the private bar in Atlanta and local city and county governments in the five-county area—have an understandable affinity for supporting services within our core geographic area.

Because of our special expertise in certain subject areas, services beyond our traditional five-county area include: the Georgia Senior Legal Hotline, which serves seniors living anywhere in Georgia; the Disability Integration Project, which serves clients in state institutions across Georgia; the Health Law Partnership, which serves clients from around the state (in over 35 counties) as long as the child is a patient at Children’s Healthcare of Atlanta; and the Grandparents Project.

3. The Private Bar’s Involvement and Innovation

Atlanta Legal Aid’s support from the private bar (legal community) is perhaps unmatched among legal services organizations across the country. Everything the private bar does—from direct financial support to Board leadership, fundraising, sending associate fellows, and delivering direct pro bono legal services to eligible clients—provides tangible benefits for our clients, advances our mission, and adds to the prestige of the program, which enables us to attract highly motivated lawyers to serve on the Board and in leadership positions.

Bar Relationships

Atlanta Legal Aid has a close relationship with the State Bar of Georgia, the Atlanta Bar Association and other local bar associations in metro-Atlanta. Recently, Atlanta Legal Aid partnered with key members from the State Bar to advocate for the adoption of the new State Bar Rule 6.5, which makes volunteering easier for private attorneys throughout the state.

Financial Support

Massive cuts to federal funding for legal services in 1982 led to the creation of Atlanta Legal Aid's first Annual Campaign. Every year since then, the private bar has generously supported our programs and allowed us to become less dependent on LSC funds. (In 1982, 75% of our funding came from LSC. LSC provided less than one-half of our funding.) The Annual Campaign currently raises about \$1.6 million per year from lawyers, law firms, and corporate legal departments. Atlanta Legal Aid's continuing vitality is directly related to its strong relationship with and support from the private bar.

The private bar and Atlanta's philanthropic community provided enormous support for Atlanta Legal Aid's recent Capital Campaign to support the purchase and renovation of its new headquarters at 54 Ellis Street in downtown Atlanta. Additionally, the Georgia Bar Foundation provides regular financial supports Atlanta Legal Aid with funds obtained from interest earned on attorney trust accounts.

Innovative Opportunities for Pro Bono Service

Volunteer attorneys from the private bar provide free legal services to eligible persons who would otherwise be turned away from Atlanta Legal Aid due to insufficient resources. We partner with the Atlanta Volunteer Lawyers Foundation and the DeKalb Volunteer Lawyers Foundation, and have in-house pro bono coordinators in our Cobb, Clayton, and Gwinnett County offices to place cases from Atlanta Legal Aid with volunteer attorneys across our service area. The Enhanced Services Project expands the reach of our pro bono to provide follow up advice to our brief service clients. This project also marks the beginning of a comprehensive view toward our program's pro bono projects. We have recently secured a two year Legal Services Corporation grant to create a Pro Bono Director position to coordinate our traditional case-based pro bono programs and to offer volunteers new ways to make a limited commitment without going to court.

Law Firm Projects

Atlanta Legal Aid partners with several law firms and one corporate legal department to operate on-going projects, such as the Grandparent/Relative Caregiver Project, the Disability Integration Project, the Eviction Defense Project, the Cobb Justice TPO Project, and the Nick Project. The firms' contributions to these programs in terms of personnel, financial support, and community impact have been significant. Law firms also have served as co-counsel with Atlanta Legal Aid on certain high-profile cases, such as the seminal *Olmstead* decision.

Law Firm and Corporate Associate Fellowships

Through the Associate Fellowship Program, law firms and corporate legal departments send associates to an Atlanta Legal Aid office for four to six months while the associate's salary and benefits continue to be paid by his or her law firm. The benefits Fellows provide Atlanta Legal Aid are numerous: during their fellowship, they provide additional attorney capacity and serve clients who would have otherwise been turned away. After their fellowship, they return to private practice as ambassadors for the program. Many past fellows have gone on to serve on Atlanta Legal Aid's Board and Advisory Committee. Three of our current Executive Committee members are former Fellows. We have had over 60 Fellows since the program began.

Fellowships

Atlanta law firms also have supported several national Equal Justice Works and Skadden fellowships, which are two-year grants that enable a new Atlanta Legal Aid attorney to work on a special project designed to extend legal services to vulnerable client populations and to involve the "partner" law firm in the work. Equal Justice Fellows

have focused on the needs of disabled clients in institutions; at-risk juveniles in need of special social, medical, and educational services; and services for poor women who have breast cancer.

The Next Generation

Atlanta Legal Aid partners with law schools to create clinics, internship opportunities, and fellowships for law school graduates, to encourage and train the next generation of pro bono attorneys dedicated to serving our low-income clients. Atlanta Legal Aid has close ties to key personnel at Emory, University of Georgia, John Marshall and Georgia State law schools. Recent law school partnerships include Georgia State to create a student clinic representing individuals with disabilities, John Marshall to provide student volunteers to provide family law advice at the Fulton County Family Law Information Center. University of Georgia law students provide intake for our Senior Legal Hotline, and Emory University law students provide initial client intake and also translation of critical legal documents.

4. Fundraising

The overall goal of resource development at Atlanta Legal Aid is to ensure a stable and diverse funding stream for the program, thereby eliminating reliance on any single source. Diversification of funding began in earnest in 1983, when the first annual private bar campaign was held following severe cuts in the LSC budget. At that point, the program received 75% of its budget from LSC. In 2015, the LSC grant makes up only 40% of our overall budget. Funding is now comprised of a mixture of unrestricted annual and major gifts; the United Way grant; local, state, and federal grants; restricted foundation grants; and interest earned on our endowment.

Another fundraising strategy has been to develop support for special projects that are aimed at serving particular vulnerable populations. This strategy allows Atlanta Legal Aid to provide additional services to parts of its low income client community by using new resources available from foundations and individuals who wish to support services to these particular groups and from government programs specifically targeted at their needs.

Atlanta Legal Aid's primary sources of support are described below:

Annual Campaign

Atlanta Legal Aid's annual campaign began in 1983 as a response to drastic cuts in federal funding. Currently, the annual campaign raises approximately \$1.6 million per year. Most of this amount comes from local law firms, which achieve "Pacesetter" status by contributing \$500 for each lawyer in the firm's Atlanta office. In 2012, the Pacesetter amount was increased to \$500 per attorney. Of the 86 law firms and corporate legal departments that contributed in 2016, 38 achieved Pacesetter status.

In addition to law firms and corporate legal departments, significant funding also comes from individuals and federated giving programs. Contributions to the Annual Campaign are generated through a combination of personal solicitations by a team of attorney volunteers from the Atlanta bar and, to a lesser extent, through direct mail, social media and online fundraising. Thus, an additional benefit of the Annual Campaign is the strengthening of ties between the private bar and Atlanta Legal Aid.

Legal Aid also seeks support, including major gifts, from individuals. This initiative began in 2004 when two local attorneys provided over \$200,000 in challenge grants. The goal of the campaign is to attract individual donors, as opposed to the institutional donors who give to the Annual Campaign.

Endowment, *Cy Pres* and Other Court Related Awards

Atlanta Legal Aid's Board-designated endowment began in 1987 with a few memorial gifts and expanded dramatically in 1996 through a \$1 million *cy pres* award. An endowment campaign, other *cy pres* awards, and investment earnings have increased the endowment to its present value of about \$3.5 million. Atlanta Legal Aid has been able to maintain the endowment, even through the recent recession. As a Board-designated fund, the endowment operates as both a long term investment and a cash reserve. It provides a source of emergency funds so that any interruption in other revenues does not disrupt the important services that Atlanta Legal Aid provides. The endowment is currently managed by Wells Fargo and overseen by an investment committee responsible to the Board of Directors. The Board allows up to 4% of the principal to be withdrawn annually to meet ongoing expenses, with additional funds available with the advance approval of the Executive Committee and the Board of Directors.

Although certainly not a guaranteed and predictable source of funds, *cy pres* awards have generated about \$3 million since 1996 for Atlanta Legal Aid. These awards are funds remaining from class action settlements that are given to charity as the next best recipient to the actual class members. To attract additional *cy pres* awards in the future, Atlanta Legal Aid periodically meets with judges and plaintiffs' attorneys to acquaint them with the types of services that Atlanta Legal Aid performs and to explain why Atlanta Legal Aid is a particularly appropriate recipient for future *cy pres* awards. In addition to *cy pres* awards, recent Legal Services Corporation rule changes have permitted Atlanta Legal Aid attorneys to seek attorneys fees under certain circumstances. Although we don't anticipate these fees in our annual budget, Atlanta Legal Aid was recently awarded over \$300,000 in fees in a complicated for its challenge to Georgia's post judgment garnishment and to HUD's regulations on reverse mortgages.

An Atlanta Legal Aid board member is taking the lead to revitalize the endowment by promoting planned giving such as deferred gifts effected through a provision in a will, making Atlanta Legal Aid Society the beneficiary of a specific, general, residuary or contingent gift from the estate. Another form of planned giving is donor assignment of a percentage of a qualified retirement plan to Atlanta Legal Aid.

During the recent recession, the endowment has served its major purpose in providing stability for Atlanta Legal Aid. While over \$2.2 million has been withdrawn in the past five years through the Board's approved spending policy, market increases and new donations have kept the overall total fairly steady. Judicious use of the endowment has prevented office closings and layoffs that have been seen around the state and the country at other programs.

United Way

The United Way is Atlanta Legal Aid's oldest source of financial support, having provided the program's first donation, a \$600 grant in 1924. The United Way currently provides more than \$245,000 in restricted funds for housing work and more than \$200,000 in unrestricted funds through donors' Specific Care designations. Atlanta Legal Aid is one of The United Way of Atlanta's 19 premier agencies. The United Way's support has been instrumental in expanding other sources of support, including its Supportive Services for Veteran Families grant and a Georgia Department of Human Services TANF grant.

Federal, State and Local Grants

Atlanta Legal Aid received \$3.79 million from the federal Legal Services Corporation in 2016, making LSC the largest single source of support for Atlanta Legal Aid. LSC funds are provided for general program support, but are restricted in use by the federal law that governs LSC.

State and local grants account for approximately 22% of Atlanta Legal Aid's budget. The State of Georgia, the City of Atlanta, and the five counties served by Atlanta Legal Aid provide more than 20 grants. For the most part, these grants are restricted and can only be used to fund specific projects, such as services for persons with AIDS, victims of domestic violence, relative caregivers, seniors, , and victims of predatory mortgage lending. Other grants may be used for more general services for residents of Atlanta or particular counties.

Georgia Bar Foundation

Atlanta Legal Aid also receives support from the Georgia Bar Foundation. Created by the Georgia Supreme Court, the Georgia Bar Foundation distributes IOLTA (Interest On Lawyer Trust Account) funds. Such funds may be used to provide general legal services to low-income people. There have been significant decreases in these funds due to low interest rates. Pre-recession support levels of over \$1.1 million have decreased to less than \$200,000. Interest rates are increasing and as a result, this general Georgia Bar Foundation should strengthen in the near future. The Foundation also administers funds from foreclosure related court settlements with Bank of America. These significant settlements provide opportunities for many years of funding to support our foreclosure and eviction defense work. These increases helped offset losses from IOLTA funds, but as interest rates increase, we expect this trend to be reversed.

Foundation Grants

Atlanta Legal Aid seeks funding for special projects from foundations. Recent examples include support of the Hispanic Outreach Project from the Goizueta Foundation, support of the Health Law Partnership from the Wilhelmina D. and John H. Harland Charitable Foundation and the 1998 Society Fund at the Children's Healthcare of Atlanta Foundation, and support of the Breast Cancer Legal Project from Susan G. Komen for the Cure Greater Atlanta. The goal of this funding strategy is to pair projects with interested funders so that unrestricted dollars can be used to fill in the gaps and to sustain work that is important but perhaps less fashionable.

Special Events

Atlanta Legal Aid holds a few special events throughout the year. The goal of these events is create a connection between individual donors and Atlanta Legal Aid. The major event is the Run for Justice, a 5K race through the streets of a Decatur neighborhood which attracted 1,000 registrants and raised \$20,000 in 2015. A popular addition to the annual race is the Beer Tasting we now host in collaboration with the Atlanta Volunteer Lawyers Foundation. In 2016, this event raised \$38,000 for Atlanta Legal Aid and had 722 attendees. New and promising additions to our special event schedule have been made possible due to the event and training space at our new headquarters at 54 Ellis, including Picturing Justice and a Marielitos CLE series. Other events include a The Great Whiskey Debate in Decatur, Justice Jam in Marietta, a Past Presidents Lunch for current and former Board presidents and annual campaign chairs; a holiday party for staff, Board and advisory committee members; a kick-off and wrap-up for the Annual Campaign; and occasional reunions for participants in the Fellows Program.

Post Recession Outlook

The "Great Recession" was a challenging time for fundraising at Legal Aid, but we weathered the storm. In 2008, Atlanta Legal Aid was one of five nonprofit organizations nationwide featured in a Special Section of the *Chronicle of Philanthropy* that identified agencies who had best positioned themselves to survive and even thrive during that time of economic difficulty. In particular, Legal Aid was cited for its creation of an endowment, its diversified funding, and its creation of programs to respond to anticipated new client needs. Indeed, we did secure grants for special projects such as the Georgia Senior Legal Hotline, Kinship Care, and the Women's Cancer

Legal Project and partnered with the State of Georgia to meet Federal Temporary Assistance for Needy Families (TANF) requirements. As a result, our endowment remained intact and staff reductions were minimized.

As the economy recovers, we have been able to broaden our funding sources and leverage existing funding. For the first time in over a decade, Atlanta Legal Aid has a budget surplus. Recently, Atlanta Legal Aid was able to raise salaries to make them more compatible with other non-profit law firms.

5. Personnel

At its core, Atlanta Legal Aid's mission is to provide excellent legal services to the most vulnerable populations in our community. Thus, it is mission critical that Atlanta Legal Aid place a high priority on the selection, leadership development, and retention of quality staff. Over time, Legal Aid has built a skilled, highly motivated, and cohesive team.

Atlanta Legal Aid currently has a staff of about 68 attorneys and almost an equal number of other staff for a total of about 120 employees. Over 20 staff members have been with the program for over 15 years. Eight have been staff members for over 30 years, some for their entire working careers. Longevity within the program is recognized publicly. Many of our lawyers have been recognized nationally and by state and local bar associations for excellence in their work. Awards received by staff members include the John Minor Wisdom Public Service and Professionalism Award from the American Bar Association, the Charles Dorsey Award from the American Bar Association, the Kutak-Dodds Prize from the National Legal Aid and Defender Association, the Dan Bradley Legal Services Award from the State Bar of Georgia, and numerous local awards, including the Martin Luther King Jr. Community Service Award.

Attorney Recruitment and Hiring

Openings at Atlanta Legal Aid are widely advertised at law schools and other locations where they are likely to attract minority and bilingual applicants. Attorney positions typically attract hundreds of applicants each year. In addition, for almost 50 years, the program has actively recruited for its summer internship program, which has proved an excellent means of attracting a high quality and diverse pool of attorney applicants and other students to work at Atlanta Legal Aid. The summer program has the added advantage of giving Atlanta Legal Aid an opportunity to evaluate the participants' skills before extending offers of permanent employment. Many of the lawyers hired by Atlanta Legal Aid have some prior work history with the program and/or another legal services organization. In 2016, Atlanta Legal Aid implemented a program-wide increase to our attorney and non-attorney salary scales. While this salary increase should attract more applicants, there remains a significant disparity between attorney salaries in the private and public sector and attorney salaries at Atlanta Legal Aid.

Employee Benefits

While Atlanta Legal Aid's salaries have always been very low as compared to private law firms and even low compared to government attorneys due to the realities of limited funding, the program has tried to compensate for its low salaries by providing a wide range of good fringe benefits. Its health care plan pays the full cost of employee coverage and half the cost of dependent coverage, and offers a retirement insurance program. The program also provides disability insurance and offers group dental coverage. For retirement, Atlanta Legal Aid matches employee contributions to a 403(b) plan up to 3% of the employee's salary. Atlanta Legal Aid offers generous paid vacation and sick leave, as well as paid parental leave.

Within the legal services community, Atlanta Legal Aid has been an innovator in providing new fringe benefits. In 1978, Atlanta Legal Aid became one of the first legal aid programs to offer a student loan forgiveness program. Still in place today, this popular program reimburses employees up to \$600 a month for their school loan

payments. Another innovation came in the early 1980's, when Atlanta Legal Aid created a flexible spending account (cafeteria plan) that enables employees to use pre-tax dollars to pay for uncovered medical and child care expenses.

Atlanta Legal Aid's diverse assortment of fringe benefits is carefully structured to be attractive to all segments of our workforce. The subsidy for dependent health coverage is attractive to couples and families, while the assistance with student loan repayments responds particularly to the needs of newer lawyers. Retirement benefits and generous health insurance coverage appeal in particular to older staff.

Training and Mentoring

Atlanta Legal Aid offers extensive training and mentoring for its legal and non-legal staff. Each new lawyer is assigned a supervisor, who engages in ongoing supervision and mentoring appropriate to the lawyer's needs, based on a program supervisory policy. This close supervision of new lawyers normally lasts two years. In addition, new lawyers complete an extensive training agenda.

Atlanta Legal Aid provides an annual training program—Legal Services University—for all of its legal staff, and invites colleagues from Georgia Legal Services Program to attend. Lawyers also attend outside CLE programs.

Atlanta Legal Aid also has an innovative program where board members are matched with staff attorneys. This program gives board members an insight into the day to day work of the program and gives staff attorneys the opportunity to learn from highly respected private attorneys with different areas of expertise.

Senior Attorney and Paralegal Programs

Atlanta Legal Aid encourages lawyers and paralegals to make the most of their individual strengths and interests to better meet the needs of our client population. Our program formalizes this effort in the "Senior Attorney" and program. After four years of experience, attorneys who have acquired substantive expertise, developed special projects, undertaken extensive bar or other work, assumed leadership roles in training or supervision, and/or otherwise demonstrated their talent and initiative in serving the needs of clients, may seek promotion to "Senior Attorney" and receive a corresponding pay raise. The premise underlying the "Senior Attorney" program is that lawyers will stay with Atlanta Legal Aid longer and be more productive if, while contributing to the program's overall mission, they are able to pursue their own interests and develop their own skills. Paralegals may similarly apply for a "Senior Paralegal" promotion if they have acquired substantive expertise, developed special projects, assumed leadership roles, and/or otherwise demonstrated their talent and initiative in serving the needs of clients.

6. Facilities and Technology

Atlanta Legal Aid is committed to having facilities and technology that are accessible to the populations it serves and that provide the necessary support for the lawyers and staff.

Offices

Atlanta Legal Aid has offices in downtown Atlanta, Decatur, East Point, Lawrenceville and Marietta. The downtown office is owned outright, and the other four offices are leased. Recent expansions in each of our four leased offices have been needed to accommodate new staff. In addition, our Health Law Partnership uses donated space in each of the hospitals run by Children's Healthcare of Atlanta.

Office	Cases Opened
Cobb	2,932
Decatur	4,956
Downtown	7,830
Gwinnett	2,471
Health Law Partnership	443
Southside	1,999
Grand Total	20,631

The downtown headquarters serves the largest number of clients and houses the largest number of staff, including the administration for the entire organization. With 40 staff and more than 100 volunteers, our new headquarters at 54 Ellis Street is newly renovated and spacious. It is located near a MARTA rail station, in close proximity to Fulton Superior Courts and the State Bar of Georgia headquarters. The new location includes parking for clients, volunteers, and staff as well as 35,000 square feet (enough room for current operations and future expansion) in a beautiful, historic building. In a marked distinction from our former downtown office, the new building boasts modern security features, is ADA accessible, and has meeting space sufficient to meet our needs.

Legal Aid leases space for its other offices, under the direction of a highly dedicated and knowledgeable operations staff who have achieved great success in negotiating leases and obtaining landlord concessions. Under their leadership, Legal Aid is able to further its goal of being a good steward of its resources and maximizing its rental dollars.

Use of Technology

As is the case with most professional services firms, technology is essential to Atlanta Legal Aid’s ability to serve its clients effectively and efficiently. A centralized client management database not only makes our workflow more efficient, but it enables us to collect the kinds of data and statistics that are essential to guiding the program and obtaining funding year after year. Optimal, a telephone-based translation service, enables us to communicate with clients in over 170 languages, while Georgia Relay helps connect us with clients who have hearing impairments.

Atlanta Legal Aid also has been proactive in identifying cost-saving technology. For example, in late 2011, Atlanta Legal Aid converted to VoIP telephone services and has recouped \$15,000 to \$20,000 in annual savings on local and long distance telephone service. Technology empowers Atlanta Legal Aid to serve ever-growing populations with web-based content. Ten times the Legal Services Corporation has given Atlanta Legal Aid its Technology Initiative Grants to underwrite the technology infrastructure and personnel needed to create and maintain these web-based resources. Recently, Atlanta Legal Aid has completed a project to utilize our cloud-based case management system to collect client feedback and to create data dashboards for leadership.

7. Board Involvement and Stewardship

Atlanta Legal Aid historically has enjoyed a strong, diverse Board of Directors. Board members take an active interest in the work of the organization, exercise appropriate oversight, provide generous financial support, respond positively to requests for assistance with various projects, and serve as good will ambassadors on behalf of the organization.

Structure

Under LSC regulations, Atlanta Legal Aid’s bylaws provide for a Board of Directors comprised of lawyers admitted to practice law in the State of Georgia, persons eligible to be clients of the program, and persons

interested in and supportive of legal services to the poor. Atlanta Legal Aid has encouraged bar associations and community organizations to appoint Board members who are culturally diverse and who also represent special populations such as Hispanics, seniors, and disabled persons. Currently, of the Board's 33 members, 14 are women and 8 are African-American.

Atlanta Legal Aid's Advisory Committee serves as a means of educating younger lawyers and potential Board members about the organization. Advisory Committee members attend meetings of the Board of Directors (as non-voting participants) and are eligible to serve on committees. Advisory Committee members are appointed each year by the incoming Board President and serve renewable two-year terms.

The Service Council was created to attract younger members to the board and advisory committee. The Service Council initially focused on special events and has now expanded to include an emphasis on pro bono service.

Oversight and Participation

Atlanta Legal Aid actively encourages Board and Advisory Committee members to learn as much as possible about the organization. At regular Board meetings, held four times a year, as well as at the Executive Committee's monthly meetings, the Executive Director reports on the program's work. Staff attorneys often make presentations about particular cases or projects.

Board and Advisory Committee members are also encouraged to get to know lawyers and staff outside of formal Board meetings. Beginning in 2005, the Board and Advisory Committee make regular visits to each of the program's five offices. Beginning in 2010, interested members of the Board and Advisory Committee were paired with a staff lawyer to further enhance day-to-day connectivity to the program. As is typical of other nonprofit organizations, Atlanta Legal Aid expects its Board members to make annual financial contributions (at levels suitable to their income) and to solicit contributions during the annual fundraising campaign.

All Board and Advisory Committee members are expected to serve on at least one standing committee, each of which is discussed below:

Executive Committee: Comprised of officers and other appointed members who exercise the powers of the Board when it is not in session and review the Executive Director's performance annually. Six members of the Executive Committee are women, two are African-Americans, and several are seniors.

Budget Committee: Reviews and revises the annual budget for Board approval; provides monitoring and oversight of staff budget functions, actual results, and projections through year; reports to the Executive Committee and Board on the financial condition of program.

Audit Committee: Meets with the program's independent accounting firm at least once each year to review the auditor's findings, including compliance with LSC regulatory requirements and requirements of other funding sources; reports to Executive Committee and Board.

Investment Committee: Oversees management of endowment; meets with investment advisors; reviews endowment's performance; reports to the Executive Committee and Board.

Priorities and Eligibility Committee: Reviews Atlanta Legal Aid's substantive priorities and income eligibility guidelines; reviews intake and case acceptance practices for conformity with guidelines.

Board Governance Committee: Reviews Board governance issues and makes recommendations to Executive Committee and Board as necessary regarding charter and by-laws, conflict of interest policy, risk management, indemnification issues, and Board committee structure.

Nominating and Board Development Committee: Identifies and recommends new Board members, focusing on racial, ethnic and gender diversity, as well as on skills and interests; recommends officers and Executive Committee members to the Board and new Advisory Committee members to the President; identifies development opportunities for Board and Advisory Committee members.

Grievance Committee: Comprised of members of the Executive Committee to conduct hearings, investigations, and other activities in compliance with the Client Grievance Procedure.

The Board of Directors is authorized to establish special purpose committees, including the following:

Strategic Planning Committee: Prepares Atlanta Legal Aid’s triennial strategic plan with advice from staff and the Board of Directors.

Outside Relationships

Atlanta Legal Aid’s Board and Advisory Committee members promote the mission of Atlanta Legal Aid and protect its good relations by serving in leadership roles with many other organizations. Board and Advisory Committee members are often emissaries for Atlanta Legal Aid with local civic and charitable organizations in which they are involved. They also are called upon to help with local funders by making appropriate contacts and by attending site visits after applications are made. They help recruit and coordinate volunteer attorneys in their respective law firms; some have that formal responsibility within their firms. Some hold or have held leadership roles in the Atlanta Bar Association and other bar associations.

Atlanta Legal Aid is active in the National Legal Aid and Defender Association (NLADA), Management Information Exchange (MIE) and other associations which consider legal services issues on a national level. In order to increase the Board’s involvement with these organizations, each year the incoming President of the Board of Directors attends the annual meeting of NLADA with the Executive Director. This affords an excellent opportunity for the Board President to meet others around the country involved in legal services and to become more knowledgeable about legal services on a national level.

III. IMPERATIVES AND GOALS – LOOKING FORWARD

IMPERATIVE: Maximize the availability, quality, and effectiveness of civil legal services provided to eligible individuals.

GOALS

- ◆ Assess changes in program demographics from the most recent Census and consider an appropriate response to the increased and redistributed poverty population in our service area.
- ◆ Retain and empower highly qualified staff by reviewing staff salaries and benefits.

- ◆ Further cultivate staff development opportunities, including assessing the Senior Attorney and Senior Paralegal processes and broadening training to additional staff and to new subject matters, including technology.
- ◆ Refine evaluation tools for all staff.
- ◆ Recruit and engage more pro bono volunteers to maximize impact for civil legal services for clients.
- ◆ Leverage our new headquarters at 54 Ellis that is accessible to our vulnerable clients; provides space for community education and outreach; is safe and efficient; and provides space to engage and empower more volunteers.
- ◆ Conduct a program-wide effort to analyze pro bono projects across the organization and consider how they could be better coordinated and streamlined to improve the client and volunteer experiences and make the best and highest use of staff resources. This will include:
- ◆ Use technology to enhance the provision of Atlanta Legal Aid’s pro bono services through the creation of a website to improve the promotion and placement of pro bono opportunities.

IMPERATIVE: Maintain the highest levels of financial strength, integrity and sustainability.

GOALS

- ◆ Ensure financial systems continue to provide timely and accurate reports for board review and oversight.
- ◆ Identify new sources of support from attorneys in outlying counties and from outside the legal community.
- ◆ Explore new and expand existing collaborations to maximize funding opportunities.
- ◆ Begin to reduce draws from endowment to allow it to grow and replenish.
- ◆ Protect program from interruption by planning and preparing for leadership succession.

IMPERATIVE: Advance our brand as an iconic institution firmly rooted in the Atlanta community and an innovator among peer organizations.

GOALS

- ◆ Develop a commonly understood, consistent, well-articulated, and compelling message that access to the kinds of civil legal services we provide is critical to the sustainability of the communities in which we live and work.
- ◆ Formalize a branding program to ensure effective and consistent delivery of brand message.

IV. CONCLUSION

The consensus of the Strategic Planning Committee is that Atlanta Legal Aid is well positioned to continue providing its clients with first-rate legal services. From a client service perspective, we have added new programs and improved existing ones, better enabling us to address the needs of a poor population that is expanding both numerically and geographically. Metropolitan Atlanta's rapidly growing immigrant population will present ongoing challenges, including the demand for multilingual lawyers and staff, which we have begun to address. We continue to look for ways in which technology can increase our efficiency and make us more accessible to our clients. Fortunately, we are in sound financial shape, having successfully diversified our revenue sources; grown our Annual Campaign; sought and received *cy pres* awards; and maintained, and in some instances increased, our funding from governments, corporations and foundations. We are also rich in "human" resources, with excellent leadership at the top and, just as important, excellent lawyering, case management, and support at all levels of the organization. We have built strong relationships with Atlanta area attorneys and the organized Bar, and numerous attorneys give generously of their time and talents. Members of our Board and Executive Committee attend meetings regularly and take their other responsibilities seriously. All in all, we are ready to face the challenges of the future.

V. ACKNOWLEDGEMENTS

Thank you to the following members of the Strategic Planning Committee for their time and effort in creating this plan:

Lillian Nash Caudle, *Executive Committee Member*

Michael Nations, *Executive Committee Member*

Steve Gottlieb, *Executive Director*

Catherine Vandenberg, *Deputy Director*

Kristin Verrill, *Director of Grants & Innovation*

Michelle Fleetwood, *Grants Coordinator*

Allison Stiles, *Manager of the Enhanced Services Project*