Highlights of the Last Five Years

In 2007, when the Five Year Plan was being finalized, the economic downturn hadn’t really hit the Foundation. With the reserve total over $3 million, a commitment to utilize over a million of the reserve to assist the legal service grantees with their needs was made. The plan also called for twenty-six staff to meet the goals outlined. IOLTA income was only going up and the world of justice looked promising. The 2008-2012 Strategic Plan was bold and progressive. The Foundation was ready.

Hit With the Downturn

Shortly into 2008, the IOLTA return decreased, there was a resulting use of reserves and lay off of staff began. The recession reality was a cry echoed in Arizona and across the nation. The resulting economic harsh impact has been reviewed and analyzed by many, for both the Foundation and the nation. The Foundation now closes out 2012 with a projected cash reserve of under $500,000 and a staff of 14. Missing in this well justified dirge, are the successes which have risen through the ashes.

The Foundation as a Phoenix

This short report will highlight those successes and the accomplishments achieved during these last five years.

During this time, there were multiple new initiatives developed and implemented, meeting the goals and objectives identified in both the Board Strategic Plan and those in the Community Goals identified in 2007.

These new initiatives include:
- The Legal Learn Contact Center
- Modest Means Program
- Lawyers Helping Homeowners
- Statewide Online Intake
- I-Civic-It
- Centennial DVDs and lessons
- Connecting with Classroom
- Internship Program
- National Mock Trial Host
- IOLTA Interest Earned Model

In addition to the new initiatives and goals reached, the Foundation has received recognition for excellence and efficiencies:
- Arizona Supreme Court Distinguished Service Award
- Chief Justice’s Outstanding Contribution to the Courts 2009
- Arizona Center for Disability Law Opening Doors to Equality Leadership Award—2009
- Arizona Capitol Times Leadership of the Year in Public Policy—2009
- ABA Standing Committee on Legal Services, Meritorious Recognition Award for Modest Means Program—2011
Board Goals continued

**Goal #1 -**

**Maintaining high quality in the established services with ongoing evaluation.**

**Objectives—**

1) Ongoing expansion of content on websites (LFK, LFS, AZLawHelp)

2) Continue enhancement of education and technology

3) Establish and maintain evaluation of project/programs to assure quality and outcomes

4) Work towards a symbiotic relationship between LRE & LS

5) Work toward statewide uniform provision of services/education

6) Determine if a reserve is most beneficial for the future of Arizona; how much money should be put in a reserve; what restrictions & uses of interest should be put on it; how much should be added each year

**Processes in Place for Ongoing Evaluation**

The first goal of the Foundation Strategic Plan includes assuring that the services offered are maintained with processes for evaluation and assessment. The Supreme Court, Dept. of Ed, DES, and CCE have goals and reports outlined in their annual contracts assuring that the agreed-upon standards and objectives are met. The Steering Committee and Foundation use surveys and feedback to assure the quality of services being provided. In addition to these traditional evaluation methods the Foundation also undergoes outside annual audits.

### During 2009 through 2012

<table>
<thead>
<tr>
<th>Website</th>
<th>UNIQUE Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>lawforkids.org</td>
<td>1,199,748</td>
</tr>
<tr>
<td>azlawhelp.org</td>
<td>917,930</td>
</tr>
<tr>
<td>azlfse.org</td>
<td>100,088</td>
</tr>
<tr>
<td>lawforseniors.org</td>
<td>43,704</td>
</tr>
<tr>
<td>kidsvotingaz.org</td>
<td>57,864</td>
</tr>
</tbody>
</table>

**Objectives Met**

As the chart indicates the websites have been utilized to provide millions of individuals 24/7 access to information. The continued enhancement of education and technology is further advanced through the use of webinars, video software, and multiple social media outlets now in use to provide interactive tools to the user.

The symbiotic relationship between LRE & LS has been more internal where each staff now has responsibilities in both areas. This shift in roles, has led to outside opportunities where legal service grantees assist with promotion of Law Day and Connecting with Classrooms. The cross connections also leads to schools & parents becoming aware of legal aid assistance and pipeline opportunities.

**Reserves**

The final objective under this goal will be addressed at the December, 2012 board meeting. The proposal is to establish a policy which recognizes the cyclical nature of the IOLTA return and thus allows Arizona to be prepared for the next three to five year cycle of lower returns.

### Historical AZ IOLTA Return

#### Years of Downward IOLTA Return

- 1992—1995 = Four Years
- 1999 = One Year
- 2001—2004 = Four Years
- 2008—2012 = Five Years
Board Goals continued

Objectives—
1) LRE will be implemented in 100% of Arizona Schools (changed in 2009)
2) Change the Foundation’s name for clarity & conciseness
3) Create a new video for the Foundation
4) Plan 30th anniversary celebrations
5) Complete statewide studies (LRE & LS)

Step 1 - Technical Assistance

The Foundation provides help to legal aid agencies and civic education groups for both our current grantees and those we can no longer financially support. In addition, we provide assistance to others who are working on initiatives supporting access to justice.

Services that staff members have provided include grant writing, public relations, human resources, technology, financial accounting, and facilitation.

The growth in the Legal Services and Public Legal Information department can be seen in more detail on the following page with the Legal Learn Center.

<table>
<thead>
<tr>
<th>Technical Assistance</th>
<th>2010 Totals in Hours</th>
<th>2011 Totals in Hours</th>
<th>2012 Totals in Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Law Related Education</td>
<td>1059</td>
<td>1453</td>
<td>1165</td>
</tr>
<tr>
<td>Legal Services</td>
<td>438</td>
<td>985</td>
<td>1103</td>
</tr>
<tr>
<td>Public Legal Information</td>
<td>262</td>
<td>772</td>
<td>2508</td>
</tr>
<tr>
<td>Support &amp; Awareness</td>
<td>238</td>
<td>571</td>
<td>146</td>
</tr>
<tr>
<td>Totals</td>
<td>1997</td>
<td>3781</td>
<td>4923</td>
</tr>
</tbody>
</table>

Step 2 - Listening to the Public

The Foundation develops a number of surveys to keep in touch with the people served.

All participants attending Foundation trainings are asked to complete surveys measuring their satisfaction with course materials, lesson plans, quality of instruction, and classroom and facility comfort. Additionally, participants are asked to evaluate their understanding of their role as an LRE instructor and preparedness for delivering LRE classroom instruction. From January through June 2012, evaluations returned positive ratings averaging 4.66 out of a 5 point high ranking.

This summer, the Foundation researched various options for administering training evaluations utilizing a new scanning system. After consulting with the AzDE evaluation staff, the Foundation purchased a Scantron system. As a result, the Foundation is now developing and administering new surveys for trainings and currently preparing compilation reports.

The AzLawHelp.org website has a feedback survey that currently has over 3,727 responses from users with 1,270 being completed in 2011. The users provide the Foundation with what content is missing, whether the information was presented in a friendly manner, and whether the information available was a help to them in their legal crisis.

Goal #2—
Develop & formalize plan to increase outreach & evaluation

Step 3 - Telling the “Justice” Story

In 2012, staff continued to promote the Foundation’s message to the community at large by speaking either individually or presenting to groups on the need for legal services and civic education in Arizona. The staff were active in over 194 events, a 30% increase over 2011 at 165 events.

In 2012, the staff performed a total time of 595 hours of outreach throughout Arizona, and this total is a 21% increase over the 2011 hours of 537.

Schools and nonprofits benefitted from our staff’s volunteer efforts and the Foundation was able to ‘get the word out’ to many people who had no idea about resources or needs of legal aid or education.
2012 was only the third full year for the Legal LEARN Contact Center and Modest Means program, and the program continues to grow faster than we could have imagined.

The Legal LEARN Contact Center 800 numbers received a total of 18,436 phone calls.

856 Bankruptcy hotline
17,580 for Legal Information

The majority of the Legal Information callers had questions answered via the automated messages, but 950 callers (6% increase over 2012) sought assistance by talking with staff and volunteers.

737 individuals used the Modest Means program to find a participating lawyer who had agreed to see them for the reduced rate of $75 per hour. This is an increase of 86 people from 2011.

In 2012, over 413,000 unique visitors sought information from the websites: azlawhelp.org and lawforseniors.org


<table>
<thead>
<tr>
<th>Types of Assist.</th>
<th>2010</th>
<th>2011</th>
<th>2012 (to-date)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Calls</td>
<td>6,247</td>
<td>18,387</td>
<td>18,436</td>
</tr>
<tr>
<td>Direct Assist. Calls</td>
<td>195</td>
<td>888</td>
<td>950</td>
</tr>
<tr>
<td>Modest Means Referred</td>
<td>477</td>
<td>651</td>
<td>737</td>
</tr>
</tbody>
</table>

Statewide Technology Assistance

Our Statewide Technology staff, over the last 5 years, have acquired LSC funding and offered their tech expertise on numerous projects for our grantees. Here are some highlights from 2012:

A2J Grant application process – The Foundation applied for and received a grant from LSC for the A2J program which would allow the 3 LSC legal aids and the Foundation’s Legal Learn system to utilize one intake system. The application involved coordination of the legal aid agencies, who would take the lead on program aspects and grant submission. The Foundation is now the lead on guiding the project and keeping it on schedule. This new web-based system will enable much easier access to information and legal help for Arizonans, while at the same time easing the load on legal services personnel answering the phones.

Map out new public drive structure for CLS – Foundation staff worked with key CLS staff in reorganizing their public drive.

A new drive structure was constructed that included accommodation for directory structures—common and particular—used by their satellite offices. Mapping and consultation is complete, although the new structure has not yet been implemented.

Redesign MIJ website – Foundation staff redesigned the William E. Morris website to make it easier to update in the future, as the old site did not lend itself to quick modifications and allowed for online donations to be received.
Board Goals

Kids Voting Presidential Election

As would be expected, a Presidential Election year means higher traffic for Kids Voting program. In 2012, Kids Voting created a new voting tool for school to participate online, partnered with CellTrust to hold its first Youth Text Poll, and had a record voter turnout.

The voting tool—Kids Vote—was created to help meet one of the Foundation’s goals of combining Kids Voting and the Foundation into one agency. This pulls the program away from the USA model and its tools.

KV partnered with secure mobile system CellTrust to offer students a texting poll option. 817 texts were received over a one month timeframe for the four presidential candidates. Though four states agreed to participate, texts came from 10 different states!

Based on sticker requests, over 169,000 students registered for this year’s election. In past years, including 2008, KV has only seen about 40—45% of those registered actually vote. The 2012 Presidential election totaled over 112,000, an over 65% voter turnout!

The close of 2012 brings the unification of agencies as KV and the Foundation become one!

I-Civics

The Arizona I-Civic-It! program works to expand the use of the iCivics web site throughout Arizona middle schools encouraging the development of informed active citizens.

When participating in Arizona’s new program, I-Civic-It!, teachers are able to receive a free McDonald’s Fruit Smoothie Coupon (sponsored by McDonald’s) for every 200 minutes they spend on the iCivics website playing the fun and educational games! As a result of this partnership, the following was accomplished:

- iCivics.org had 96,259 visits to the website and 9:12 minutes (on average) spent on the site.
- Arizona educators reported that 1,089 students spent ~310,883 minutes playing the iCivics games.
- Staff conducted a 24 forty-minute sessions during professional development trainings to promote iCivics.org
- Staff represented Arizona at a Civic Education Fair during the National Conference of Chief Justices in St. Louis

We the People

With much thanks to the Arizona Supreme Court, the Foundation was able to hold a State Competition in January 2012 despite funding cuts from other sources.

The state showcase is a culminating event for students from across the state, enabling them to show of their months of hard prep work. This year’s awardee, Corona Del Sol from Tempe, went on to the national competition in D.C.

The 2012-2013 regional competitions will be held on December 8th at various locations across the state. The top classes from these competitions make up who will go on to the state competition held in January of 2013.
Board Goals

**Objectives:**

1) Establish a comprehensive fundraising plan for grantees
2) Engage legal community to offer fellowships for legal aid service grantees
3) Explore state appropriation for generalized legal service work
4) Seek recertification and new certification for college credit in three state colleges for our LRE trainings

**Comprehensive Plan for Grantees & Fellowship**

The 2009 “Increasing Revenue” plan for the LSC plans was created through consultation and work of Dennis Dorgan, fund raising consultant. The plan proposed that resources would be garnered through a multi-layered approach including encouraging greater participation in banks with higher IOLTA return, government funding & initiatives, increased attorney support and increased corporate and foundation support. The plan identified collaborative efforts as well as individual responsibilities. The challenge that the LSC entities continue to face is their successful efforts of raising ‘other’ funds is met with a declining IOLTA and federal funding return.

Both Phoenix School of Law and Sandra Day O’Connor School of Law have provided law school graduates to assist at the Foundation and with grantees.

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**Arizona LSC Agencies Efforts to Increase Support**

<table>
<thead>
<tr>
<th>Year</th>
<th>Officers</th>
<th>Other Admin/ Teachers</th>
<th>Trainings</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007-2008</td>
<td>252</td>
<td>133</td>
<td>24</td>
</tr>
<tr>
<td>2008-2009</td>
<td>182</td>
<td>150</td>
<td>25</td>
</tr>
<tr>
<td>2009-2010</td>
<td>186</td>
<td>123</td>
<td>20</td>
</tr>
<tr>
<td>2010-2011</td>
<td>113</td>
<td>89</td>
<td>18</td>
</tr>
<tr>
<td>2011-2012</td>
<td>81</td>
<td>102</td>
<td>16</td>
</tr>
<tr>
<td><strong>Five Year Total</strong></td>
<td><strong>814</strong></td>
<td><strong>597</strong></td>
<td><strong>103</strong></td>
</tr>
</tbody>
</table>

**LRE Trainings—Increasing Certification as Incentive**

Certification with Court, COJET, POST and continuing education credit has been renewed. Comparable programs were not able to arranged with the other two state universities. The incentive for attendance at trainings has not been strictly the ability to obtain college credit as originally assumed.

The attendance at trainings has been reduced with the reduction in funding allocated toward the trainings. The Arizona Department of Education funds have been reduced by almost 50% and the support for the Center of Civic Education has been zeroed out (loss of ~$100K) except for the in-kind support of coordination of competitions and reduction of costs for texts.

Even with an approximate total grant loss of 50% and a loss of two staff, the total number of educators trained over the five year period exceed 1,400.

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*Reaching for the Stars is only possible if others are raising you beyond all barriers...*
Board Goals

Next Generation Fellows

In our third year to promote the rebuilding of our Fellows program for the next generation, we have reached a total of 75 new or renewed Fellows.

In the past three years, past Founding Fellows, judiciary and partners have been contacted regarding pledging to join. Staff have contacted the groups they work with including Modest Means attorneys, Wills For Heroes steering committee, and past and present volunteers. Our aspiration is to reach 100 new fellows by the time Arizona’s 100th year comes to a close - February 14th, 2013.

We’ve also made becoming a fellow easier than ever. Our donation page’s first option is to select a box to become a fellow and all designated donations will go towards your fellow pledge! So even that $400 working tax credit donation made to Southern Arizona Legal Aid or Time Out Shelter can be counted towards your pledge! Join Now!

Thank You to our Lifetime and Next Generation Fellows

**Lifetime Fellows**
- Dan Bagatell
- Barbra Dawson & Hon. Samuel Thumma
- David & Eileen Haga
- Elias Romley
- Stephen Shadle
- Phillip E. Von Ammon
- Alberta B. Farrington Foundation
- Alliance Bank
- Dial Corporation
- Ford Foundation
- Honeywell
- M & I Bank
- National Bank of Arizona
- Patricia Whitehead’s Estate
- Perkins Coie

**NGF**
- Jody Arnold
- Hon. Mark E. Aspey
- Michael Baraban
- Hon. Thomas Berning

Matthew Binford
Hon. James Blake
Hon. Craig Blakey III
Damon Boyd
Margaret Breidenbach
Emily G. Burns
A. B. & A. J. Butler
Mary Bystricky
Ellis Carter
Lauren J. Caster
Bryan Chambers
John Cosden
Amelia Craig Cramer
Whitney Cunningham & Jennifer Mott
Hon. Glenn M. Davis
Ashley Donovan
Matthew and Michele Feeney
Richard Feldheim
Hon. Stanley G. Feldman
Noel A. Fidel
Matthew Fischer
Dewain Fox
Sandra S. Froman

John Furlong
Brad Gazaway
Pat and Tom Giallanza
Sasha Glassman
Mary Mangotich Grier
Mark I. Harrison
Milt & Meredith Hathaway
Rachel Hernandez
Robert Ong Hing
Robert J. Hirsh
Hon. Eileen Hollowell
Jeffrey Jacobson
Faith Klepper
Hon. Joseph Kreamer
Kathryn Krecke
Hon. Danelle Liwski
Lisa Loo
George Lyons
Denis R. Malm
Hon. Patricia Mariella
Daniel McAluliffe
Hon. Ruth McGregor
Alberto Olivas
Bernard Van O'Steen
Samuel Ottley
Eric Overstreet
Randall Papetti
Gary Pearlmutter
Richard Platt
Hon. Maurice Portley
Jane Proctor
Peter Rathwell
Gary Restaino
Arthur E. Romley
Kevin Ruegg
Hon. Michael Ryan
Domingos R. Santos
Lynn and Roy Schubert
Hon. Anne Segal
Kenneth J. Sherk
Lara Slifko
Hon. Roxanne Song Ong
Gary L. Stuart
James Susa
Christina Urias
John H. Westover
Hon. Lawrence F. Winthrop
Charles Wirken
Fellows Increase

<table>
<thead>
<tr>
<th>Title</th>
<th>Amount</th>
<th>2009</th>
<th>2012</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>NGF</td>
<td>$1,000</td>
<td>1</td>
<td>75</td>
<td>4%</td>
</tr>
<tr>
<td>Fellow</td>
<td>$1,000</td>
<td>497</td>
<td>492</td>
<td>1%</td>
</tr>
<tr>
<td>S. Fellow</td>
<td>$1,000-$2,499</td>
<td>335</td>
<td>346</td>
<td>3%</td>
</tr>
<tr>
<td>Patron</td>
<td>$2,500</td>
<td>12</td>
<td>13</td>
<td>-12%</td>
</tr>
<tr>
<td>S. Patron</td>
<td>$2,501-$4,999</td>
<td>79</td>
<td>81</td>
<td>4%</td>
</tr>
<tr>
<td>Benefactor</td>
<td>$5,000</td>
<td>10</td>
<td>11</td>
<td>-12%</td>
</tr>
<tr>
<td>S. Benefactor</td>
<td>$5,001-$9,999</td>
<td>18</td>
<td>29</td>
<td>1%</td>
</tr>
<tr>
<td>Advocate</td>
<td>$10,000-$24,999</td>
<td>18</td>
<td>14</td>
<td>4%</td>
</tr>
<tr>
<td>Lifetime Fellow</td>
<td>$25,000+</td>
<td>9</td>
<td>16</td>
<td>1%</td>
</tr>
</tbody>
</table>

Charge for Justice

The Foundation thanks credit card processing company GCG Consulting, Inc. for their donation of 10 basis points for every credit card transaction processed under the Charge for Justice program.

As all are well aware, credit card processing companies, including Paypal, charge a fee for each transaction. If a firm or merchant signs up with the Charge for Justice program, GCG Consulting donates 10 basis point of that fee to the Foundation!

Not only is this a wonderful donation, but the more attorneys that allow payment by credit card, the increased access Arizonans have to legal representation—since they won’t have to come up with immediate cash for a retainer.

Website Sponsorships

As you referenced earlier, an average of 35,000 unique individuals visit the AzLawHelp site each month.

For a company to sponsor AzLawHelp would be a win—win all around. Sponsors would be thanked in a prime location on the site (see mock up image), be seen by approximately 35,000 unique visits per month, and the sponsorship is a tax donation!

Survey results shows that the users visiting the site are not necessarily the indigent. Most visitors (64%) are women, single (29%) between 30-45 (37%), and 22% make between $20—40,000 annually.

The Foundation is currently contacting companies who may be interested in being seen by this market and helping their community. Sponsorship is $2,000/month with a limit of 3 sponsors per month. Companies the Foundation would like to reach are those who have no possible “predatory” competitors.

We will also be working with Local First to promote the sponsorship opportunity to Arizona’s local businesses.
State Bar Partnership

As our partner from day one, the State Bar and Foundation continue to support each other as we both work towards our missions of access to justice. Though always separate organizations, over the years, the partnership has evolved from a larger administrative role to a greater role in partnering with program services and initiatives to further the goals of both organizations.

The Foundation continues to administer or assist with many SBA joint programs like Modest Means Program, Legal LEARN, Bankruptcy Hotline, Mock Trial, Wills For Heroes, IOLTA and the Pipeline projects.

Connecting with Classrooms & Diversity Pipeline

Connecting with Classrooms is an Arizona Supreme Court sponsored program in partnership with the SBA and Foundation. It also partners Arizona teachers with Arizona judges and attorneys providing students the opportunity to learn from professionals working in the field of law. In collaboration with Arizona educators and the Arizona Supreme Court, eight lessons were developed for attorneys and judges to implement during their classroom visit to celebrate Arizona’s Centennial. In September, the Foundation partnered with the Arizona Law Alliance to schedule visits with schools from attorneys and judges on Constitution Day.

Additionally, the Foundation and State Bar of Arizona have partnered to launch a new model for the State Bar of Arizona’s Diversity Pipeline Program. The State Bar will recruit 10 attorneys and the Foundation will recruit 10 School Safety Officers to pair them to implement a six lesson cohort utilizing the iCivics.org lessons and activities. These activities will enhance the Connecting with Classroom initiatives.

Wills for Heroes

Wills for Heroes provides free estate planning legal services to first responder personnel in Arizona. The Foundation, in partnership with the State Bar, oversees the program and is an affiliate of the Wills for Heroes Foundation, a separate charitable 501(c)(3) entity.

Wills for Heroes has held events in every county of Arizona.

In 2012, to-date, 713 wills have been written with over 2,300 total hours donated.

This program is one way of thanking those who put their life everyday on the line for all of Arizona.

State Bar’s Access to Justice Task Force

The SBA’s Board of Governor’s had decided to commission an Access to Justice Taskforce to decide where to allocate $400,000. The proposal submitted by the task force and approved by the B.O.G. included funding towards DNA, SALA and CLS programs, for a strategic fundraising plan for the Foundation; to translate the legal websites and other pertinent legal aid info into Spanish and offer increased Navajo legal information available; and to conduct a social return on investment (SROI) study for legal aid.

A summary result of the impact, includes, but is not limited, to:

- Flagstaff now has an attorney working with a Medical/Legal partnership.
- Consumer Law Project has distributed educational materials statewide
- SALA has a new case management system
- SALA has increased volunteer activity with UofA and Pima County Court
- CLS has been able to serve clients in the Family Law Assistance Program.
- Actualmente, más del 75% de azlawhelp.org ha sido traducidos al español (Currently, more than 75% of azlawhelp has been translated in Spanish).
- The Foundation has contracted with Community Services Analysis LLC to produce a SROI analysis of legal aid.
Board Goals continued

Goals #6- High quality board of directors

Objectives:
1) Enact board contribution policy
2) Board members must serve on both LRE & LS committees during their first 3 year term (changed in 2009)
3) Officers must spend a minimum of one year on the Finance Committee
4) Combine structure committee with executive committee & Government Relations committee with Public Relations Committee

The Foundation 2012 Board of Directors

- Hon. Thomas Berning, Patrick McWhortor
- Damon Boyd, Robin Mitchell
- Jeffery Brodin, Randall Papetti, Treasurer
- Scott Evans, Meredith Peabody
- Matthew Fischer, Secretary, Richard Platt
- Brad Gazaway, Hon. Helen Purcell
- Tom Giallanza, VP, Domingos Santos
- Rodney Glassman, Hon. Roxanne Song Ong, President
- Faith Klepper, Christine Thompson
- Hon. Joseph Kreamer, Christina Urias, Past President
- Todd Lang, President Elect, Hon. Lawrence Winthrop

Ex-Officio
- Kevin Ruegg, John Phelps

Proposed Board Contribution Policy

As a Board Member of the Arizona Bar Foundation, I understand and accept the following as a pledge that constitutes my commitment to service on the Board. This commitment includes:

1) to cultivate an awareness of the issues relating to “access to justice” across Arizona, including both law related education and legal aid services, and become knowledgeable about the IOLTA program;

2) making every effort to attend all meetings of the Board, the committees, and task forces of which I am or become a member;

3) observing parliamentary procedure and displaying courteous conduct in all Board, committee and task force meetings;

4) always acting and advocating for the good of the organization;

5) avoiding real or apparent conflicts of interest, and, if such a conflict exists, to declare that conflict and recuse oneself from voting; and,

6) championing the goals of the organization and fundraising on behalf of the organization, adding my contribution to the goal of having 100% Board participation in giving to the organization.
Staff Celebrating Tenured Service!

**Fifteen Years +**
Susan Nusall 16 years
Alvaro Flores 15 years

**Ten Years +**
Tedd Harris 11 years
Joannie Collins 11 years
Julie Wilson will be 10 years in January!

**Five Years +**
Jennifer Castro 8 years
Kevin Ruegg 8 years
Lara Slifko 8 years
Becky Tigerman 6 years
Chris Groninger 5 years
Holly Bowen 5 years
Kim Bernhart 5 years

The Foundation Staff 2012

Kim Bernhart, Public Legal Information Manager
Holly Bowen, Staff Accountant
Jennifer Castro, Professional Development Manager
Joannie Collins, Director of Quality Enhancement
Rosie Figueroa, Instruction Specialist
Alvaro Flores, Director of Technology and Business Operations
Chris Groninger, Policy and Outreach Manager
Dan Hall, Public Legal Information Specialist
Tedd Harris, Statewide Technology Specialist
Susan Nusall, Community Resource Manager
Kevin Ruegg, Ph.D., CEO/Executive Director
Stephanie Sandner, Senior Account
Lara Slifko, Chief Resource Officer
Becky Tigerman, Executive Assistant
Andrew Tuttle, Compliance Coordinator
Julie Wilson, Chief Financial Officer

District Coordinators

The Foundation utilizes the dedication of local experts to assist with promoting and implementing several civic education programs. Each of the District Coordinators know and understand the needs of their community. For a small stipend, but with much appreciation, these volunteers do amazing work.

Region 1: Wendy Tollefson
Region 2: Michael Fane
Region 3: Gina Alfonso & Kent Barter
Region 4: Jaime Festa-Daigle & Margaret Nyberg
Region 5: Nancy Diab & Lisa Adams
Region 6: Nancy Diab &

Goals # 7
High quality staff maintained

**Objective-**
1) Increase budget for employee development allowing for greater participation of staff in opportunities for growth in areas beneficial to the mission and work of the Foundation

With the recession, the challenge of meeting this objective was daunting until the Foundation staff used their ‘unlimited ingenuity resources’ to create an employee development plan specifically used during times of layoffs the “On the Job” recession training plan:

A. New Skill Development
B. Just In Time - Time Management
C. Team Building
D. Stress Management (aka a whole lot of humor!)
Community Goals:  
Legal Services

HISTORY

As the Foundation Board was developing the Foundation 5 year strategic plan, they were also working in collaboration with the Arizona LSC agencies to learn from the community at large their vision for ‘Arizona equal access to justice.’ Utilizing the ABA Standards for the Principles of a State Delivery System for the Delivery of Civil Legal Aid, developed in 2006, multiple entities and individuals were surveyed to gather input of the community vision: Including, Arizona attorneys, court personnel, the SBA BOG, the Foundation Board Members, and legal aid agencies.

With the ABA principles as an outline and the 2007 Legal Need Study as the definition of need, survey responders developed the following action plan. The ‘accomplished and/or in progress’ goals are the work of multiple partners. Arizona has much to be proud of in the work completed over the last five years.

A. Providing Legal Services to Lower Income

**Accomplished and/or In Progress**

1. Establish 800-number statewide service call center where referrals can be appropriately made and initial information can be coordinated.
2. Enhance current coordination, outside the legal realm, with entities to increase delivery of legal assistance to populations in need (e.g., DV shelters, medical clinics).
3. Explore additional partnerships with others outside the legal realm to provide and promote further outreach (e.g., housing nonprofits, homeless shelters, centers assisting farm workers).
4. Increase use of mass media and computer technology to inform members of the public of their basic rights, answer legal questions, inform about the services provided through legal aid, and provide informational resources in a consistent and unified approach.
5. Support the creation and continuation of state cadres focusing on specific areas of the law (e.g., steering committee, immigration law committee, DV, Housing, etc.).

B. Full Range of Legal Services in All Forums

**Accomplished and/or In Progress**

1. Ensure web-sites are available in every county and on tribal reservations.

**Not Yet Addressed:**

1. Ensure self-help centers are available in every county and on tribal reservations.
2. Pursue stable and adequate funding for self-help services.
3. Pursue strategies to remove any unnecessary barriers to access for self-represented litigants.
4. Support the creation and/or continuance of legal-aid offices in each county and on each tribal reservation.
5. Support the creation and/or continuance of support from volunteer lawyers and/or Tribal Advocates in each county and tribal court.
Community Goals—Legal Services

C. High Quality—Cost Effective Legal Service System

Accomplished and/or In Progress

1. Ensure the provision of continuing legal education for legal aid attorneys and volunteer lawyers so that they will best be able to serve the clients in the areas of law needed.

2. Place as a priority, funding projects that facilitate collaboration between agencies and reduce administrative costs.

3. Support the development and maintenance of a legal advocate assistance website where forms are available, case law can be accessed, and a listserv is available for direct questions/answers for legal advocates relating to assisting his/her clients.

4. Strengthen the statewide technology infrastructure to facilitate broader and more effective development of new delivery mechanisms.

5. Ensure that azlawhelp.org, lawforseniors.org and other websites are used in assisting with the state’s legal aid delivery system. The websites, by answering basic legal questions, will assist with freeing intake lines for those who need direct legal assistance.

6. Support the expansion of the use of hotlines as an effective way to answer direct client questions in specific areas (e.g., Elder hotline, NELL – Native Education Legal Line)

7. Develop and support programs and services designed to encourage and assist private lawyers to serve modest means clients.

D. Seek to Use All Help: Financial, Volunteers, & In-Kind

Accomplished and/or In Progress

1. Explore partnerships with funders interested in addressing the social needs surrounding the legal issues identified to increase support for legal aid addressing those specific needs.

2. Promote training social-need service providers to enhance their ability to identify legal issues and determine when/where referrals should be made.

3. Increase and support volunteer lawyer programs to assure availability across the state.

4. Explore development of corporate access to justice funding initiatives to support legal aid.

5. Work with groups to establish cost comparisons for communities when legal aid are not available (e.g., $60,000 could shelter 100 homeless people in Phoenix for one month or keep 300 people from being wrongfully evicted by funding one legal-aid attorney position). These statistics will be used in communicating the value and impact of legal aid.

Not Yet Addressed:

1. Establish benchmarks for community health relating to access to legal aid (e.g., community health for homeownership is normally identified when 65% - 70% of residents own homes.)

E. Engaging All Entities & Individuals in Provision of Legal Services

Accomplished and/or In Progress

1. Develop programs and partnerships in communities with attorneys and local support agencies to identify needs, establish appropriate referral systems, and work toward cost effective means of providing legal aid and education.

2. Support the creation and continuation of state legal-aid cadres focusing on specific areas of the law (e.g., steering committee, immigration law committee, DV, Housing, etc.). Encourage outreach to community partners to increase public awareness of resources.

3. Pursue strategies to increase funding and support for the provision of legal aid from a broad base of resources including the general public, state appropriations, and private foundations.
F. Legal Services are Uniform & Accessible throughout State

**Accomplished and/or In Progress**

1. Make it a priority to support the availability of legal aid /volunteer attorneys in rural areas.
2. Ensure that the legal aid offices meet ADA requirements.
3. Encourage use of an 800 number and hotline services to access information and legal aid services.
4. Support the development of fellowship programs and special incentives for legal aid attorneys working in remote areas of the state.

**Not Yet Addressed:**

1. Assure each county and tribal reservation has a self-help center.

G. Engage Clients & Those Eligible in Planning of Services

**Accomplished and/or In Progress**

1. Support efforts that enhance legal aid through availability of multi-lingual and multi-cultural service providers.
2. Utilize the websites and call center to assist in identifying client needs through questions submitted and issues reported.
3. Promote and support client feedback evaluation tools to be used by legal aid providers.
4. Promote and support client feedback evaluation tools to be used by self-help centers.

H. Involve Courts in Facilitating Access to Justice

**Accomplished and/or In Progress**

1. Explore amending the rule for licensed Arizona attorneys living outside of the state to contribute toward legal aid if it is not possible to provide the recommended number of pro bono hours due to their out of state residency.
2. Explore strengthening the wording in the Rule recommendation and the reporting requirements of pro bono work for Arizona attorneys.

**Not Yet Addressed:**

1. Develop a partnership with the courts to develop and provide access to justice training (including the use of cy

I. All involved—Law Schools, Bar Associations, Legislative Branches,

**Accomplished and/or In Progress**

1. Explore increased revenue through changes of court rules/procedures (e.g., admission on motion, cy pres, pro hac vice, etc) as a source of support for legal services.
2. Further develop the partnership with state law schools and the Foundation to increase support for the recruitment and retention of legal aid attorneys.
3. Increase communications between the Foundation, organized bar, judiciary, legal aid providers, law schools, executive and legislative branches of government, private sector, and other stakeholders to assure, at a minimum, quarterly correspondence or communication pertaining to legal access to justice issues of Arizona.
4. The Foundation and State Bar leaders will collaboratively explore avenues to increase bar member programs that will increase funding for legal aid services.
5. Explore the possibility of quarterly meetings of representatives from each entity listed above to share information, report on action plan progress, and promote increased support of legal aid.

**Not Yet Addressed:**

1. Implement use of American Bar Association ‘Standard of Civil Legal aid’ evaluation tool and/or the LSC’s Performance Criterion, annually with representatives of each entity listed above and publish results of survey.

“Courage is what it takes to stand up and speak. Courage is also what it takes to sit down and listen.” Winston Churchill
Community Goals:
Law Related Education

HISTORY

The Foundation, in partnership with the Arizona Civic Coalition, requested the ASU Center for Civic Education and Leadership compile the results of studies, surveys, and forums gathered over a two-year period. The goals outlined were then established as described in this report excerpt:

“The data that formed the study was collected from a number of sources including students and teachers who completed written surveys and participated in focus groups throughout Arizona. The recommendations for this report came from Arizona educators, policy makers and concerned citizens. The Civic Education Summit provided the venue for civic-minded citizens to grapple with the data and recommend strategies and polices for improving civic education in Arizona.” letter from Nancy Haas, ASU Center for Civic Education and Leadership, 2009 in the introduction, Arizona Civic Education Study.

As with the Community Legal Services Goals, this work was accomplished with the efforts of numerous partners and gives reason for all of Arizona to be proud of the work accomplished.

Goal 1. Foundational Civic Education & Awareness

Accomplished and/or In Progress

1. Increase the presence of civic education in elementary through high school, with specific units or by integrating civics content throughout the curriculum, especially in reading and writing.

Not Yet Addressed:

1. Create a standards-based social studies test and administer it at benchmark years start-

Goal 2 & 3: Civic Participation and Political Action

Accomplished and/or In Progress

1. Provide opportunities for voluntarism, service learning.

2. Encourage students to be politically and civically active in their community.

Goal 4: Civic Virtue

Accomplished and/or In Progress

1. Create a database of community resources for teachers including the names of resource people such as judges, elected officials, retirees, and college student mentors.

2. Engage students in relevant, meaningful curriculum with active learning strategies that simulates democracy in action.

3. Create an online Civics Resource Center with recommendations for community resources and best practice.

4. Provide opportunities for voluntarism and service learning.

5. Create professional development opportunities for teachers.

Arizona’s next hundred years is in the hands of the children today. We need to make sure they are ready.
Reflecting on times gone by is a custom long ago established with each holiday season. This year, with the closing of a five year strategic plan, the reflection, while more of an analysis, is still filled with the same awe and gratitude that the holidays manifest.

The amount of work accomplished in this Strategic plan, I believe, is unprecedented even without consideration that it was accomplished during a deep recession with staffing cuts and budget reductions for not only the Foundation, but all of our partners as well. Arizona’s justice system pulled through a tough time with not just ‘dust on our feet’ and ‘I survived’ as a badge. We are emerging from this economic storm with new initiatives, stronger partnerships, and enhanced technologies... For all Arizonans as an aid in equal access to justice with law related education and with legal assistance resources.

I read this report and have the same awe as looking at the one shining star breaking through the dark night. The commitment demonstrated is inspiring and the gratitude I feel for being allowed to be a part of this Foundation is overwhelming. It is with complete sincerity that I invite others to join the Foundation through our Next Generation Fellows Program. It is an invitation because being a part of the accomplishments of this organization is a true gift to not just those benefitting but to each person giving as well.

From all of the Foundation, thank you for being a part of opening the doors of justice to all Arizonans. You have truly brought light and hope to many.

With much gratitude and humble respect,

Kevin S. Ruegg, Ph.D.
CEO/Executive Director

“Promoting Access to Justice for All Arizonans”