

# Application: LAWM - 2026

LAWM Legal Aid of Western Michigan  
Legal Services Annual Grant

## Summary

ID: LS2026-0000000168

Last submitted: Oct 13 2025 04:49 PM (EDT)

## Grant Application Narrative

Completed - Oct 12 2025

## Organization Information

---

Have you reviewed the Organization Information Task?

Yes

---

Have you updated any information in the Organization Information Task?

Yes

---

If you selected "Yes", please indicate below the sections in which you have made significant changes.

Quality Systems - #6 (adjusting the number of paralegals on staff) and #14 (updates regarding LAWM's succession plan).

Finance Administration - several in order to document our shift from having a Director of Finance to having a contracted fractional CFO and a Finance Manager.

---

## Description of Services

---

**1- Briefly list the purposes and use for your IOLTA grant and/or Filing Fees contract:**

The grant enables us to carry out our mission to protect rights, challenge injustice, and fight poverty through free legal advocacy for people and families. Direct representation to eligible clients makes up most of our work and requires the most resources. LAWM provides advice and brief service as well as extended service to our clients, including representation in administrative tribunals and state and federal courts. Additionally, LAWM manages a pro bono program, using volunteers to expand our legal resources, and delivers community education programming and information to our client-eligible communities.

**2- Describe how the funds leverage your ability to obtain specific funding from other sources.**

Although not used in any direct dollar-for-dollar matches, these funds help support programs in which other funders will not or cannot fund 100% of program expenses. These include but are not limited to programs to serve seniors utilizing Older American Act funds and programs to support survivors of domestic violence using United Way funds.

### **3- Explain any plans or activities and a timeline for developing new or expanding current services.**

As an outgrowth of our LSC Pro Bono Transformation Grant as well as growing requests for LAWM to expand into more probate work documented in our needs assessment and recently revised Statement of Priorities, LAWM is building out this probate work. In summer 2025 LAWM completed an estate planning clinic pilot project and in fall 2025 added a program-wide probate staff attorney. In 2026, Legal Aid of Western Michigan (LAWM) aims to expand its services to help low-income individuals and families with estate planning and probate, ensuring family homes remain within their families.

To achieve this, LAWM will use two service models:

“Family Foundations” Estate Planning Clinics – These expanded clinics will rely on volunteer attorneys to assist eligible clients in drafting essential estate planning documents. These documents will allow individuals to decide how their property should be distributed upon their death, helping to preserve family assets.

Staff Attorney Support and Probate Representation – A dedicated staff attorney with expertise in probate law will support the pro bono clinics and provide direct legal representation to individuals and families navigating the probate process. This will ensure that property transfers occur as intended and prevent unnecessary loss of assets.

---

### **4- Describe the unmet client and/or community needs addressed with help of this funding.**

According to the Legal Services Corporation’s 2022 Report, The Justice Gap: The Unmet Legal Needs of Low-Income Americans, approximately 63-70% of low-income Americans seeking LSC funded legal services did not receive any or enough legal assistance although other research indicates the unmet demand is likely higher. LAWM statistics reveal a similar justice gap in our service delivery area, especially in the top three categories of family law, housing, and income maintenance. This funding allows LAWM to increase representation for individuals in need and especially for vulnerable populations including but not limited to senior citizens, rural residents, veterans, persons with disabilities, and survivors of domestic violence.

5- Indicate what region and target population you are proposing to serve with IOLTA and/or Filing Fees funds.

**Target Population**

**Responses Selected:**

General low-income population

**Region**

**Responses Selected:**

Western

The estimated number of people eligible for services in the geographic areas indicated above are as follows (based on the 2022 ACS 5-year estimate at 125% poverty level with a 2020 midpoint):

Eastern - 256,473 (15.3308%)

Metro - 682,661 (40.8063%)

Northern - 136,705 (8.1716%)

Southeast - 267,748 (16.0047%)

Western - 329,343 (19.6866%)

**Description of Services (cont.)**

## **6- Describe your program's recent community impact and accomplishments.**

This past year, LAWM formed the Community Engagement Forum, bringing together LAWM staff from each office on a regular basis to share ideas and strategies for engaging with community partners. This group has facilitated the refresh of existing communications materials along with drafting new content.

In Fall 2025, LAWM attorneys will hold our annual (and always very well received!) "Donuts and the Law" series for partner agencies. This year's presentation will focus on family law and five presentations will be held throughout our service area.

More generally this year, LAWM participated in many community events or outreach partnerships, including events such as:

- Conducting a monthly series of presentations and then intake sessions focused on tax law at the Muskegon Rescue Mission's Community Resource Center
- Presentation on tenants rights and eviction for the Community Action House staff in Holland
- Training the Pine Rest Street Reach team in Grand Rapids on SSI/Social Security law
- Attending the Housing Kalamazoo collaboration for Housing Equity
- Tabling at the Cass County Community & Family Fall Expo
- "Mobile Home Know Your Rights" presentation at Berrien Springs Public Library

## **7- What are your program's goals in increasing private attorney involvement for the upcoming year.**

In 2026, our Pro Bono program goals include:

1. Implementing the integration of pro bono functions throughout our field offices so more LAWM staff are involved in the pro bono program and volunteer attorneys have better connections with their local offices all with a focus on centering client experience through the pro bono case placement process.
2. Revising and expanding our Family Foundations estate planning clinics
3. An emphasis on recruiting new attorneys to our pro bono program by offering a variety of opportunities as well as appropriate training and support for those opportunities, with an emphasis on communicating with newer attorneys and young lawyer sections to engage potential volunteers early in their career.

**8- Describe any new recent innovations or collaboration in your program's service delivery area.**

As referenced above, LAWM conducted a series of pilot project estate planning clinics as a part of our LSC Pro Bono Innovation fund grant. At each "Family Foundations" clinic, LAWM partnered with a local community agency as well as pro bono volunteers to provide estate planning services to our clients. Our partner agencies for this pilot round of clinics included the Kalamazoo Public Library, Evergreen Commons in Holland, Tanglewood Park in Muskegon, Corwell Health Center for Wellness in Benton Harbor, and Linc Up in Grand Rapids. We are excited to take what we learned from this pilot project to revise and expand these clinics in 2026.

**9- Describe the measures with which you will evaluate your organization's progress in meeting the needs to be addressed.**

In our case management system, we record and measure client demographics and case opening, closure, outcome, and pro bono referral data points, among others. We break down data geographically, demographically, and by case type to gauge outcomes, and we compare data against similar data sets from the past.

## Administrative Capacity

**1- If you have had a peer review or funder review in the past 3 years, list the major recommendations or suggestions from your recent peer review team and specify the actions your program has begun or completed in response to each. Include estimated time frames for any steps not yet under way or those which are in process.**

LAWM's Older Americans Act funders from Regions 3A, 4, 8 and 14 and our CDBG funders conduct assessments annually (or nearly annually).

Prior issues raised that we reported in prior years have been addressed.

No new recommendations or suggestions have been made.

**2- List training or professional development opportunities you anticipate providing to staff, including administrative staff, in the upcoming year.**

Newer attorney staff, with less than three to four years' experience, are generally required to complete skills training such as CORT BLST, CORT Litigation Training, and TAST or the Hillman Advocacy Program. Staff are also selected to attend other CORT Trainings, depending on CORT offerings, staff experience level and interest, and the needs of each office. LAWM encourages its staff to participate in the MPLP task forces as well as the CORT First Friday webinar series. Staff are also provided with opportunities to participate in webinars provided by national programs, such as the National Housing Law Project, the National Consumer Law Center, and the National Center on Law and Elder Rights.

All staff, including support staff, are invited to attend the annual MPLP Roadshow training to receive updated substantive information and explore new legal areas. LAWM also offers opportunities to attend ICLE trainings on relevant topics as well as trainings through our pro bono partnership with PLI. Case handling staff may receive additional training to develop substantive expertise, sometimes required by funders for specific grant projects.

Administrative staff, such as the Executive Director, Director of Program Operations, and the Director of Advocacy plan to attend the NLADA Annual Conference, the ABA Equal Justice Conference, and the LSC Innovations in Technology conference.

Internally, LAWM staff attend a program-wide webinar on a biweekly basis. Although often focused on internal LAWM procedures and updates, it is also an opportunity to present substantive updates or presentations from external partners. At least two in-person program-wide meetings are planned annually.

## **Administrative Capacity (cont.)**

**3a- Check boxes (1) through (4) below to indicate activities that are performed by your organization:**

**Responses Selected:**

4 - Representing individuals whose income is greater than 200 percent of the federal poverty standard

**Indicate below the safeguards that are used to ensure that the IOLTA funds are not being used for specifically prohibited purposes. Specify record-keeping and accounting procedures used to verify that IOLTA funds are being spent only for eligible clients/cases.**

LAWM staff records eligibility and case information, including financial eligibility and citizenship status, into LAWAM's case management system. The case management system flags potential eligibility issues, such as income over 125% of poverty, that may require additional review and consideration. LAWAM staff are trained to assign clients and matters to funding sources that fund (and do not prohibit) cases based on client location or age, financial eligibility, and/or substantive case type. Additionally, administrative staff run regular reports to review for compliance in the case management system, including to confirm eligibility and proper funding source assignment.

LAWAM further safeguards against taking ineligible types of cases by screening cases through a case review process. Compliance and eligibility questions are forwarded to the Director of Advocacy and the Director of Program Operations for review.

**3b- Check boxes (1) through (7) below to indicate activities that are performed by your organization:**

**Responses Selected:**

6 - Representing individuals whose income is greater than 125 percent of the federal poverty standard.

**Indicate below the safeguards that are used to ensure that the Filing Fees funds were not being used for specifically prohibited purposes. Specify record-keeping and accounting procedures used to verify that Filing Fees funds are being spent only for eligible clients/cases.**

LAWM staff records eligibility and case information, including financial eligibility and citizenship status, into LAWAM's case management system. The case management system flags potential eligibility issues, such as income over 125% of poverty, that may require additional review and consideration. LAWAM staff are trained to assign clients and matters to funding sources that fund (and do not prohibit) cases based on client location or age, financial eligibility, and/or substantive case type. Additionally, administrative staff run regular reports to review for compliance in the case management system, including to confirm eligibility and proper funding source assignment.

LAWAM further safeguards against taking ineligible types of cases by screening cases through a case review process. Compliance and eligibility questions are forwarded to the Director of Advocacy and the Director of Program Operations for review.

**4- List training or professional development opportunities that accounting and financial staff has had in last 24 months.**

LAWM's Bookkeeper and Executive Director - along with their contracted fractional CFO from YPTC (Amy Weiss) - participated in meeting with CFOs from the Michigan Advocacy Program and Lakeshore Legal Aid regarding cost allocation as we work to improve our processes/procedures in that area.

LAWM's Executive Director attended LSC's CFO Bootcamp in September 2025.

---

**5- Has your program experienced fraud, misappropriation of funds, embezzlement, or theft within the last twenty-four months?**

No

**6- Describe any changes made to your program's accounting manual or procedures in last 24 months.**

LAWM's Board of Directors approved a completely revised Accounting Manual in November 2024.

Highlights of changes (most of which were made to meet new LSC Financial Guidance) include:

- C.3.1.13 Cash Disbursements: Bid threshold from \$3,000 to \$10,000
- C.5.2. Procurement Methods
- Gifts for retiring staff: from \$15.00 per year to \$20.00 per year
- Changed Administrative/HR Assistant references to Director of Human Resources
- 3.2.6 Removed HIPPA Privacy officer section
- B.4. Updated the cost allocation policy to align with LSC requirements
- F.3. & F.4. PAI section updates
- B.3.3 Added reference to resolving client trust funds outstanding items within two months.
- C.3.1.20 Documentation for bank account information including tracking and review by the board annually
- C.3.8 Added section that the board must approve a fixed amount of petty case for each office.
- C.6.3. Added verification of salary hours and hourly staff timesheets during payroll preparation.
- C.14. Fraud Response Plan
- E.1.2 Inventory or IT equipment containing sensitive information regardless of value
- E.4.3 Disposal of IT equipment containing sensitive information to be approved by ED or DOF
- G.1. Conference/Training Travel written policies
- G.2. Local Travel policies
- G.3. Nonlocal Travel policies
- G.4. Board Travel
- G.5. Non-Travel reimbursement threshold over \$200 approved by DOL
- G.6. Expense Reimbursement what is allowable & procedure for same

**7- If there is additional information or explanation you would like to provide, please enter it below.**

(No response)

## Case Projections

Completed - Oct 13 2025

## Cases

**Do you expect to meet your case projections for the current year. If you do not, explain why:**

Based on the number of cases closed during the 12-month period ending September 30, 2025, we anticipate that we will meet our total staff case closure projections for the current year. Because the fourth quarter typically sees the highest volume of case closures, we evaluated the full 12-month period rather than annualizing the year-to-date figures.

**Do you expect PAI cases to meet your projections for the current year. If you do not, explain why:**

By annualizing the number of PAI cases closed year-to-date, we anticipate that we will meet our total PAI case closure projections.

**Grant Application Year**

Indicate the estimated number of cases in which clients will be provided with direct legal services during the grant application year, assuming the total you budgeted for is available. Please include cases closed by CALL for your service area in the figures below.

Indicate in the last column the number of total projected cases that will be provided legal services through CALL and the case will be closed by CALL.

## Grant Application Year Staff Cases

Type of Legal Problem	Cases Closed after Limited Service	Cases Closed after Extended Service	Total Projected Case Services	Number of These Cases Completed on Hotline
Consumer/Finance	505	37	542	207
Education	5	0	5	4
Employment	84	31	115	2
Family	1161	285	1446	442
Juvenile	38	3	41	22
Health	51	2	53	23
Housing	2107	523	2630	255
Income Maintenance	340	60	383	83
Individual Rights	309	59	385	7
Miscellaneous	88	18	106	43
Total Cases	4688.0	1018.0	5706.0	1088.0

## Grant Application Year PAI Cases

Type of Legal Problem	Cases Closed after Limited Service	Cases Closed after Extended Service	Total Projected Case Services
Consumer/Finance	1	23	24
Education	0	0	0
Employment	5	4	9
Family	8	41	49
Juvenile	0	1	1
Health	0	0	0
Housing	6	30	36
Income Maintenance	2	3	5
Individual Rights	2	45	47
Miscellaneous	4	18	22
Total PAI Cases	28.0	165.0	193.0

## Pro Bono Attorneys

How many pro bono attorneys do you anticipate will assist in handling cases during the grant year?

130

## Staffing

Completed - Oct 12 2025

## Staffing

Has your program had any significant staff increases or reductions during the current calendar year?

Yes

**Please explain any significant staff changes.**

We experienced several vacancies in the beginning of 2025.

**Civil Legal Services Staffing**

Indicate the total number of Full-Time Equivalent (FTE) paid and volunteer staff persons who were directly involved in the activities covered by the total expenditures.

**Staff Function - Current Year**

Type of Work Performed	Lawyers	Paralegals	Others	Total
Legal Case Work	30.3	3.7	.8	34.8
Supervision of Legal Case Work	5.86	0	0	5.86
Secretarial Clerical Work	0	0	10.8	10.8
Management and Administration	3	0	3.36	6.36
PAI Coordination or Pro Bono Management	1.75	0	1.15	2.9
Other 1 (specify below)				
Other 2 (specify below)				
<b>Total</b>	<b>40.9</b>	<b>3.7</b>	<b>16.1</b>	<b>60.71</b>

Other 1	(No response)
Other 2	(No response)

### Vacant Positions - Current Year

	Lawyers	Paralegals	Others
Vacant Positions included in budget	0	0	0

### Staff Function - Grant Application Year

Type of Work Performed	Lawyers	Paralegals	Others	Total
Legal Case Work	34.72	3	.8	38.52
Supervision of Legal Case Work	5.86	0	0	5.86
Secretarial Clerical Work	0	0	11.4	11.4
Management and Administration	3	0	3.74	6.74
PAI Coordination or Pro Bono Management	1	0	1.42	2.42
Other 1(specify below)				
Other 2 (specify below)				
<b>Total</b>	<b>44.58</b>	<b>3.0</b>	<b>17.36</b>	<b>64.94</b>

Other 1	(No response)
Other 2	(No response)

## Vacant Positions - Grant Application Year

	Lawyers	Paralegals	Others
Vacant Positions included in budget	0	0	0

## Current Year Financials

Completed - Oct 13 2025

## Current Year Financials

### REVENUES, EXPENSES and FUND BALANCES

Provide a breakdown of projected **Revenues, Expenses and Fund Balances** for the **Current Calendar Year**. If your organization's fiscal year is different, please pro-rate expenditures to cover the current calendar year.

Enter whole numbers, without punctuation (e.g., 10000 not 10,000.00).

#### Starting Current Year Funding Balance (Carryover from prior year)

Please indicate below the fund balances your program will carry over from the prior year.

	Current Year
Beginning IOLTA Fund Balance	0
Beginning Filing Fees Fund Balance	0
Beginning Other Fund Balance	3762106
Total Beginning Fund Balances	3762106.0

## Current Year Revenues

Source of Funding	Current Year
a- IOLTA - Civil Legal Services Grant	173200
b- Filing Fees (1) General Civil Legal Services Grant	1069985
b- Filing Fees (2) Statewide Grant	0
c- Legal Services Corporation 1) Basic Field Grant	2845297
c- Legal Services Corporation 2) Other Grants & Revenue	130000
d- Foundations (other than IOLTA or Filing Fee program funds)	183759
e- United Way	202458
f- 1) State Grants	
f- 2) Local Grants	232801
f- 3) Community Development Block Grants	179654
g- 1) Title III - Administration on Aging	205500
g- 2) Title XX - Health & Human Services	0
g- 3) Violence Against Women Act (VAWA)	0
g- 4) HUD Grants	0
g- 5) Other Federal Programs	1610259
h- Faith-based funding	0
i- Law Schools	0
j- Attorney Fee Awards or Client Services Fees	23329
k- 1) Access to Justice Fund	235925
k- 2) Other Private Bar Fundraising	0
k- 3) Cy pres Awards	0
k- 4) Other donations/Fundraising	24777
l- Income from publications, training, videotapes & other products	0

m- Miscellaneous	1644221
Total	8761165.0

### Changes in Non-IOLTA Funding

If your program lost or gained significant amounts of non-IOLTA/non-Filing Fees funding, please explain (list sources, amounts, and reason for change).

(No response)

### Current Year Projections - Civil Legal Services

#### Personnel Costs

	Current Year Projections
1. Lawyers	3044831
2. Paralegals	231280
3. Others	2720160
4. Employee Benefits	1178440
Total Personnel Costs	7174711.0

## Current Year Projections - Civil Legal Services

### Non-Personnel Costs

	Current Year
1. Space	437776
2. Equipment Rental	42497
3. Supplies	29713
4. Telephone	22275
5. Travel	24881
6. Training	42360
7. Library	48084
8. Insurance	42946
9. Dues & Fees	55000
10. Audit	41700
11. Litigation	65181
12. *Property Acquisition	0
13. Purchase Payments	0
14. *Contract Services to Clients	177103
15. *Contract Services to Program	239990
16. *Other	91946
<b>Total NonPersonnel Costs</b>	<b>1361452.0</b>

### Current Year Estimated Ending Fund Balance (which is also Grant Year Beginning Fund Balance)

<b>Total Beginning Fund Balance</b>	<b>3762106</b>
<b>Current Year Projected Revenues</b>	<b>8761165</b>
<b>Current Year Projected Expenses</b>	<b>8536163</b>
<b>Total Ending Fund Balance</b>	<b>3987108.0</b>

## Breakout of Current Year Ending Fund Balance

The total below should equal the current year Ending Fund Balance of \$3987108.0.

	Current Year
Ending Fund Balance in cash, investments & grants	3734820
Ending Fund Balance in property and fixed assets	252288
Total	3987108.0

## Donated Services and Property during Current Year

	Current Year
Services, including value of contributed attorney services	1500000
Donated property, including space	38277
Total	1538277.0

## Grant Year Financials

Completed - Oct 13 2025

## Grant Year Financials

### REVENUES, EXPENSES and FUND BALANCES

Provide a breakdown of your organization's total Revenue, Expenses and Fund Balance for the grant year. If your organization's fiscal year is different, please pro-rate expenditures to cover the grant year indicated.

Enter whole numbers, without punctuation (e.g., 10000 not 10,000.00).

## Beginning Grant Year Fund Balance

The total below should equal the current year Ending Fund Balance of \$3987108

	Grant Year
Ending Fund Balance in cash, investments & grants	3734820
Ending Fund Balance in property and fixed assets	252288
Total	3987108.0

## Grant Year Revenues

Source of Funding	Grant Year
a- IOLTA - General Civil Legal Services Grant	216500
b- Filing Fees (1) General Civil Legal Services Grant	1151664
b- Filing Fees (2) Statewide Grant	0
c- Legal Services Corporation 1) Basic Field Grant	2741453
c- Legal Services Corporation 2) Other Grants & Revenue	100000
d- *Foundations (other than IOLTA or Filing Fee program funds)	217604
e- United Way	182053
f- *1) State Grants	0
f- *2) Local Grants	249000
f- *3) Community Development Block Grants	175000
g- *1) Title III - Administration on Aging	204500
g- *2) Title XX - Health & Human Services	0
g- *3) Violence Against Women Act (VAWA)	0
g- *4) HUD Grants	0
g- *5) Other Federal Programs	1465259

h- Faith-based funding	0
i- Law Schools	0
j- Attorney Fee Awards or Client Services Fees	7500
k- *1) Access to Justice Fund	235925
k- *2) Other Private Bar Fundraising	0
k- *3) Cy pres Awards	0
k- *4) Other donations/Fundraising	20000
l- Income from publications, training, videotapes & other products	0
m- *Miscellaneous	1638277
<b>Total</b>	<b>8604735.0</b>

**Provide a Breakdown of d - Foundations (list names, amounts and description)**

Kalamazoo Community Foundation - \$6,750 (probate project in Kalamazoo County)  
 Stryker Johnston Foundation - \$150,000 (general operations in Kalamazoo County)  
 MSBF AOJ Grant - \$33,854 (probate project)  
 MASBF Endowment Draw - \$27,000

**Provide a Breakdown of f - State and Local Grants (list names, amounts and description)**

Cherry Health - \$116,000 (Medical Legal Partnership at clinic in Grand Rapids)  
 Corewell Health - \$6,000 (Medical Legal Partnership at clinic in Benton Harbor)  
 Kalamazoo County Senior Millage - \$18,000 (senior cases in Kalamazoo County)  
 Kent County Senior Millage - \$90,000 (senior cases in Kent County)  
 Muskegon County Senior Millage - \$19,000 (senior cases in Kalamazoo County)

**Provide a Breakdown of g - Federal Grants (list names, amounts and description)**

MSBF Eviction Prevention - \$1,100,000  
MSBF Unemployment - \$80,000  
Veterans subgrant from MAP - \$1,000 (cases for referred veterans in Cass and St. Joseph)  
Low Income Tax Clinic - \$109,000 (tax controversies with the IRS)  
MSBF - SSI Grant - 175,259

**Provide a Breakdown of k - Fundraising (explain any fundraising outside the ATJ Fund)**

Other Donations - \$20,000 (donations from non-attorneys)

**Provide a Breakdown of m - Miscellaneous (list names, amounts and description)**

Bank Interest - \$100,000  
Value of donated pro bono hours - \$1,500,000  
Donated space - \$38,277

**Changes in Non-IOLTA Funding**

If your program anticipates losing or gaining significant amounts of non-IOLTA/non-Filing Fees funding, please explain (list sources, amounts, and reason for change).

This budget assumes:

- 15% cut to our LSC Basic Field grant (loss of \$432,861)
- cuts to United Way grants (loss of about \$20,000)
- loss of our Kalamazoo ARP grant (loss of \$50,000)
- cut to our MSBF Eviction grant (loss of \$100,000)

## Grant Year Budgeted Expenditures - Civil Legal Services

### Personnel Cost

	IOLTA/Filling	Other	Total
1. Lawyers	564253	2870079	3434332
2. Paralegals	38329	194963	233292
3. Others	184153	2436698	2620851
4. Employee Benefits	202828	1031688	1234516
Total-Personnel	989563.0	6533428.0	7522991.0

## Grant Year Budgeted Expenditures - Civil Legal Services

### Non-Personnel Costs

	IOLTA/Filing	Other	Total
1. Space	71672	364560	436232
2. Equipment Rental	7122	36225	43347
3. Supplies	6463	32876	39339
4. Telephone	3733	18988	22721
5. Travel	4170	21209	25379
6. Training	7099	36109	43208
7. Library	9201	46799	56000
8. Insurance	8064	41017	49081
9. Dues & Fees	9217	46883	56100
10. Audit	6988	35546	42534
11. Litigation	10923	55561	66484
12. *Property Acquisition	0	0	0
13. Purchase Payments	0	0	0
14. *Contract Services to Clients	177103	0	177103
15. *Contract Services to Program	40219	204570	244789
16. *Other	16628	84577	101205
<b>Total NonPersonnel Costs</b>	<b>378602.0</b>	<b>1024920.0</b>	<b>1403522.0</b>

### Property Acquisitions, including real property (line 12).

Provide below detail/amounts. Total items should equal totals above.

(No response)

**Contract Services to Clients (line 14)**

Provide below detail/amounts. Total items should equal total above.

CALL - \$177,103

**Contract Services to Program (line 15)**

Provide below detail/amounts. Total items should equal total above.

Accounting Support - \$107,386

Consultants - \$22,032

IT Services - \$107,771

Miscellaneous - \$7,601

**Other (line 16)**

Provide a breakdown of (other) expenses showing detail/amounts. Total items should equal total above.

Depreciation - \$77,686

Board Expenses - \$1,129

Community/Employee Relations - \$22,391

**Grant Year Estimated Ending Fund Balance**

<b>Total Beginning Fund Balance</b>	<b>3987108</b>
<b>Grant Year Projected Revenues</b>	<b>8604735</b>
<b>Grant Year Projected Expenses</b>	<b>8926513</b>
<b>Total Ending Fund Balance for the Grant Year</b>	<b>3665330.0</b>

## Projected Donated Services and Property during Grant Year

	Grant Year
Services, including value of contributed attorney services	1500000
Donated property, including space	38277
Total	1538277.0

Does your program's board have a plan for increasing or decreasing your fund balance? Please explain below.

Ending Fund Balance as a Percentage of Revenue:

Grant Year: 42%

Our Board of Directors has as a goal maintaining 3-6 months of operating expenses in reserve

## Subgrants, Contracts or Agreements

Completed - Oct 12 2025

## Subgrants, Contracts or Agreements

Please list any subgrants, contracts, or agreements that your program has with others or organizations who provide legal services to indigents permitted under the IOLTA grant or Filing Fees Contract. Please include the name, the duration of the contract and geographical area covered by this contract.

	Name	Duration of the Contract	Geographical Area
1	CALL	01/01/2025 - 12/31/2025	LAWM service area
2			
3			
4			
5			
6			
7			
8			
9			
10			

**Subgrant 1 Listed Above (upload here)**

[LAWM CALL MOU 2025.pdf](#)

**Filename:** LAWM CALL MOU 2025.pdf **Size:** 508.3 kB

## Memorandum of Understanding

### Legal Aid of Western Michigan and Lakeshore Legal Aid

2025

Legal Aid of Western Michigan (LAWM) and Lakeshore Legal Aid (Lakeshore) agree to collaborate with Lakeshore providing hotline legal services through its Counsel and Advocacy Law Line (CALL) to LAWM clients.

1. *Agreement Term.* This agreement is effective January 1 through December 31, 2025.
2. *Region to be served.* This agreement covers the region the Michigan Bar Foundation identifies as the "Western Service Area."
2. *Referring program priorities.* The parties agree to develop referral protocols for each office. These protocols will address both the referral criteria, mechanism, and case priorities.
3. *Process for referral of extended service cases.* CALL will utilize the capabilities of the parties' mutual client data management system, JusticeServer, to electronically refer priority cases to LAWM as reflected in the office referral protocols and priorities.
4. *Description of conflict process.* At the time of intake, CALL will do a conflict check in the CALL database before accepting a case for assistance by CALL. CALL will not knowingly accept a case for a client who is an adverse party to LAWM. The parties will work together to develop protocols that avoid the creation of conflicts of interest for either program.
5. *Access to the CALL database.* LAWM shall have access to its cases in JusticeServer.
6. *Payment amounts and provisions.* LAWM will pay Lakeshore \$177,103 each year for these services. The payments will be made in four installments of \$44,275.75 each, payable as follows: March 31, June 30, September 30, and December 31.

7. *Capacity and service quality.* The parties agree that quality client legal service and client convenience are of the utmost importance, and the purpose of this collaboration. Both parties agree to periodically review the success of the project and will immediately determine the best means of addressing any identified service issues or weaknesses.
8. *Legal Services Corporation regulations and restrictions.* Lakeshore understands that LAWM is funded in part by the federal Legal Services Corporation (LSC). Lakeshore is familiar with LSC regulations and restrictions and will operate under the LSC regulations and restrictions. When acting on behalf of LAWM pursuant to this agreement, CALL will not engage in any LSC-prohibited advocacy. CALL **will** not use funds received from LAWM for advocacy activities that are prohibited by LSC.



Pam Hoekwater  
Executive Director  
Legal Aid of Western Michigan

Dated: 9-27-24



Ashley E. Lowe  
Chief Executive Officer  
Lakeshore Legal Aid

Dated: 9/30/2024