

Application: LLA-E - 2026

LLA Lakeshore Legal Aid
Legal Services Annual Grant

Summary

ID: LS2026-0000000170
Last submitted: Oct 10 2025 04:40 PM (EDT)

Grant Application Narrative

Completed - Oct 10 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.

1-ORGANIZATIONAL OVERVIEW

B) CASE DEVELOPMENT

2-Describe your program's impact work

3) PRO BONO PROGRAM/PRIVATE ATTORNEY INVOLVEMENT

g-Describe roles played by other organizations vis-à-vis your pro bono program - such as, State Bar's MI-Lapp, local bar associations, other legal services providers, client organizations, or others.

5) COLLABORATION

b-Describe your participation in CORT, LSAM, State Planning Body and other similar organizations.

d-Describe sharing of in-house training, materials, resources, or backup & support services; and sharing of pro bono lawyers to cover geographic exigencies.

j-Describe how your program is involved with the access to justice campaign.

QUALITY SYSTEMS

7-Describe types of training provided to all staff, indicate the sources and typical amount of training provided.

13-Describe how training is provided to staff, private lawyers, volunteers or other persons involved in service delivery.

FINANCIAL ADMINISTRATION AND TECHNOLOGY SYSTEM

2-Describe your program's systems and procedures for financial administration and management.

4- Indicate the number of full-time equivalent accounting and financial staff

5-List your program's accounting and financial staff, including their duties and responsibilities; and their qualifications and training.

9- Describe how your program's board exercises its fiscal oversight responsibilities.

14-Describe the backup protocol for any data on individual computers.

Description of Services

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

Lakeshore provides services that are planned and coordinated throughout the service area and are integrated with services throughout the state. Lakeshore staffs eight offices, one of which houses the Counsel & Advocacy Law Line (CALL), to provide client services throughout the Metro and Eastern regions. Lakeshore services include intake and pro se access, addressing emerging legal needs and the needs of underserved populations, and advocating for systemic change on a region-wide basis.

Lakeshore staff provide legal education and outreach in the communities. Lakeshore publicizes the availability of its services and encourages the public to inquire about their rights and obligations by contacting Lakeshore's central telephone intake system, CALL. CALL attorneys diagnose callers' requests and provide the quickest and highest level of service possible. Callers' matters are referred to the Lakeshore office best suited to provide extended legal services, as and when appropriate. At the local offices, case handlers represent individual clients in negotiations, agency and court hearings, and appeals. As part of a coordinated effort with Legal Services of Eastern Michigan to avoid duplicate services and provide the highest level of service to those most in need, Lakeshore's office in the Eastern Region, located in Port Huron, focuses primarily on serving seniors and survivors of domestic violence. Lakeshore's long-standing relationships with community agencies that assist seniors allows Lakeshore to reach the senior population and remain a reliable resource for seniors in the community. From 2019 to 2022, Lakeshore used Michigan State Bar Foundation (MSBF) funding and a grant from the Department of Justice Legal Assistance for Victims (LAV) to support its work for domestic violence survivors. Lakeshore is currently relying solely on MSBF funding to bridge the gap for its domestic violence work until additional funding can be secured.

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

Michigan State Bar Foundation (MSBF) funds are critical to Lakeshore's ability to maintain operations and attract additional local, state, and federal funding. This funding enables Lakeshore to work with local shelters, police, prosecutors, and courts, providing a coordinated legal response to survivors of domestic violence and elder abuse throughout the Eastern region. With the support of MSBF funding, Lakeshore sustains funding from St. Clair Millage and AgeWays. For example, AgeWays requires a significant in-kind match, which MSBF resources provide. Funding from LSC's Technology Innovation Grant (TIG) program has supported ongoing enhancements to the JusticeServer Case Management System (CMS). Lakeshore also received TIG funding to improve its regional service knowledge base, known as "the Wiki," which helps Michigan legal aid programs expedite access to high-quality service delivery. These grants support our work, allowing Lakeshore to provide a coordinated legal response to the communities we serve.

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

Lakeshore will continue to seek additional funding to expand its work for survivors of domestic violence in St Clair County. Without additional funding, Lakeshore does not have plans for new or expanded services.

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

Lakeshore uses MSBF funding to provide legal services to clients in the region who would otherwise be unable to access legal representation. In addition, this funding provides Lakeshore with the means to maintain its place in the community where it is well integrated among other services providers in the Eastern Region of St. Clair County. Like many of the area service providers, Lakeshore is instrumental for the advocacy and protection of older residents. St. Clair County has a notably higher population of older adults than the rest of the state. In 2022, the US Census data revealed that the region's residents aged 65 and older made up 20.5% of the population, higher than the statewide average for 2024, which was 19.2%. In addition, the Eastern region service area saw a rapid increase in senior population between 2010 to 2022, during which the population aged 65 and over increased by 38.3%. This funding enables Lakeshore to provide legal advocacy and community education to older clients who have experienced financial abuse committed by exploitive family, friends, caretakers, contractors, business owners, and online scammers.

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:

Eastern

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.

Lakeshore is committed to providing services to clients who have experienced impactful life changes. Lakeshore's services provide comfort to clients with legal issues presented after the loss of a partner, family member, or friend. Lakeshore helped clients obtain revised estate planning documents, or transfer affidavits required to allow clients to take ownership of assets left behind by a loved one, like bank account funds, or real property. For example, Lakeshore has maintained a close partnership with the St. Clair County Register of Deeds office staff who regularly refer clients to its Port Huron office who need to resolve land ownership matters related to the loss of a loved one. Lakeshore has also developed a very close partnership with the St. Clair County Probate Court Administrator and staff that consistently refer clients to Lakeshore for extensive services and direct representation for the probate of estate matters. In addition to referrals, the Probate Court partnered with Lakeshore to provide quarterly presentations on probate matters including the probate of estates. These referrals and outreach presentations remain a consistent source of client referrals in 2025. Through these partnerships, Lakeshore will continue to respond to the needs of clients who need assistance with estate and probate related matters through brief and extensive legal services, and regular informative presentations.

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

In the Eastern region, Legal Services of Eastern Michigan has recruited volunteers and, in an effort to not interfere with those efforts, Lakeshore works to place any potential pro bono cases with Eastern. Lakeshore may reach out directly to a pro bono attorney for assistance in the event of an extraordinary case most suitable for pro bono representation or co-counsel.

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

In 2024, Lakeshore piloted a community outreach program, bringing all team members to sites to work remotely to increase client accessibility to its services. In that year, Lakeshore hosted monthly client outreach days at the St. Clair County's Council on Aging center in Marine City. This program proved successful with staff meeting an average of five new clients plus multiple follow-up client meetings at each event. This gave clients who lived far away from the Port Huron office easier access to Lakeshore's services. In 2025, Lakeshore expanded this program to the Council on Aging Center in Capac. Later, Lakeshore expanded again to include outreach at housing sites throughout the region to increase access to services for clients with transportation, health, or other barriers that prevented them from travelling to the Port Huron office or Council on Aging centers located throughout the region. The first housing site that participated in the program was the North Port Senior Living facility located in Fort Gratiot, in the northern area of Lakeshore's service area. Lakeshore plans to continue moving this outreach event through collaboration with housing sites throughout the region during the remainder of 2025 and into 2026.

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

Lakeshore uses collaboration, data analysis, and case review to identify, monitor, and respond to the legal needs facing people living with low income in Lakeshore's service area. Lakeshore offices are located throughout the community, and staff attend local community partner meetings to learn first-hand about the problems facing people living with low incomes. As part of its strategic plan, Lakeshore hosts bi-annual community listening sessions inviting clients and community partners to share their needs and feedback about Lakeshore's services. Through these collaborations, Lakeshore better understands the needs of the community.

Lakeshore consistently reviews data to monitor case numbers and client needs. Quarterly, Lakeshore analyzes variances in case types and identifies where resources and training are needed. Lakeshore tracks the geographic origins of cases to guide staffing, community outreach, and offsite intake planning.

Lakeshore's Litigation Director and Chief Advocacy Officer review case acceptance memoranda, which staff prepare for every case considered for full representation. They identify trends and understand the types of cases coming in, determine which cases are being accepted for representation, and learn which cases are denied service but should be getting representation. Because the memos include case facts and legal issues, they provide more clarity than data that measures case types alone.

Lakeshore also solicits client feedback, sending surveys to clients by mail or email at case closure, at Lakeshore presentations, and community events.

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.

Yes. Ageways conducts annual assessments of both the program and financial implementation of their funding. In 2024 and 2025, Ageways completed onsite programmatic and fiscal assessments of Lakeshore's Legal Assistance and Prevention of Elder Abuse, Neglect, and Exploitation grants and determined there were no compliance findings, so no action steps are necessary. In 2023, there were no compliance findings in the programmatic assessment. The 2023 PEANE financial assessment reflected a missing explanation as to why there was spending over or under 10%. In its monthly completed reports going forward, Lakeshore will include an explanation of when spending is over or under 10%. This has been resolved.

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

Lakeshore combines in-person, hybrid, pre-recorded, virtual, and interactive training programs. Lakeshore's Staff Development Director structures courses to address the specific training needs of each job description and varied experience levels.

Lakeshore assigns internal virtual learning via its Learning Management System. All staff complete quarterly required compliance video courses with imbedded testing. 64 other video courses are available on-demand and the course catalog continues to grow.

All staff must attend quarterly program wide meetings, quarterly compliance training, internal and external skills courses by job description.

New hires engage in orientation programs spread over the first three weeks of their employment. Sessions combine in-person lectures, hands-on technology training, video training courses, peer mentoring, shadowing, and structured self-study.

New Management Team members engage in a curriculum during their first two months as managers combining individual meetings, group sessions, and LMS video training. Lakeshore teaches leadership, providing meaningful feedback, reporting, technology, and other management skills.

The 2026 Litigation skills curriculum features beginner-level courses the first month each quarter, and experienced-level courses the second month each quarter. All courses include lectures, small group in-person intensive skill training sessions, and reference materials. New litigation staff are required to take all beginner courses. All litigation staff participate in the experienced courses, with senior staff acting as mentors.

CALL staff will continue their monthly Third Friday skills training sessions. Lakeshore has issue-specific LMS video training courses available both on-demand and by assignment to supplement in-person and hybrid training.

Lakeshore has an operations training curriculum with a combination of live and recorded classes focusing on each section of Lakeshore's Operations Manual. All administrative and support staff are included.

Client Support Advocates train internally with the teams they support. External training sources include Wayne State University, Senior Regional Collaborative, Jewish Family Services of Metro Detroit, various Community Action Agencies, and other programs.

All Lakeshore staff are encouraged to register for Lakeshore's internal Project Management 5-session course. Lakeshore will offer three cohorts in 2026: two in-person and one virtual course available by supervisor assignment through the Lakeshore LMS. Other elective sessions internally include: justiceserver training, writing skills, and wellness sessions. External training sources include LSC, SBM, MPLP, COURT, NITA, ABA, MCESDV, MIE, National Association of Paralegals, and Shriver Center. Staff participation in annual meetings and conferences with LSC, SBM, NLADA, ABA, NCLC, NACA, and NHLP continues. Additionally, Accounting Department staff engage in external training through LSC, MIE, and Bridgespan.

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.

Senior clients and domestic violence survivors with incomes greater than 200% may be served by Lakeshore staff, as other funding sources allow for serving clients regardless of income or with higher income levels. Lakeshore's data management system, timekeeping, and reporting ensures IOLTA funds are not used for such clients. The Compliance Director verifies that each case's funding code corresponds to the client eligibility information within JusticeServer.

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.

Senior clients and domestic violence survivors with incomes greater than 125% may be served by Lakeshore staff, as other funding sources allow for serving clients regardless of income or with higher income levels. Lakeshore's data management system, timekeeping, and reporting ensures filing fee funds are not used for such clients. The Compliance Director verifies that each case funding code corresponds to the client eligibility information within JusticeServer.

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

ChatGPT – OIG Training, ChatGPT for Excel, 1099 Training, MIE Administrators Training, Cybercrime Fraud Awareness Prevention, LSC Training, LSC CFO Bootcamp, Compliance Training, SAGE Intacct Training, Multi-State Payroll Compliance Training, Cybersecurity-KnowB4 Training, MIE Preventing and Detecting Fraud, Cyber Fraud Risk Briefing: Business Email Compromise.

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

Yes

If you answered "Yes" or "We are currently investigating a possible incident", please describe the incident, the job title of the personnel involved, what action was taken, what changes were made to your program's fiscal oversight policies and procedures and internal controls following the incident.

In March 2025, Lakeshore discovered that a social engineering crime was committed. An external bad actor gained access to the CFO's computer where the bad actor intercepted an e-mail and directed staff to change the account number on a vendor ACH in the amount of \$51,875. Through Lakeshore's cyber security insurance, \$20,000 of the lost funds were reimbursed. A police report was filed and the Office of Inspector General was contacted. There were subsequent investigations including two forensic audits. The bad actor was identified and a warrant was issued, however the person is out of state, and extradition is unlikely. No MSBF funds were lost in this incident nor used for investigation or recovery purposes. A new policy mandating multi-step confirmation was adopted which requires staff to contact the person or vendor directly to confirm before any new ACH payments are established or changed.

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

The most significant change was the creation of a Financial Oversight Committee Charter which was adopted in May, 2025. Additionally, there were changes made in the Insurance Bonding section to mirror the LSC CFR requirements, giving FOC decision making authority to approve purchases up to \$25k, and a small change recognizing that Lakeshore went from allocating payroll by month to allocating it by-weekly.

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

Lakeshore is currently negotiating a new collective bargaining agreement with its union. Salary projections are estimates based on expectations of the final results, but salary and other financial terms may change with the final agreement.

All contributions to Lakeshore Legal Aid are subject to Legal Services Corporation mandated restrictions and may not be used in any manner inconsistent with the Legal Services Act and Regulations. For further information, please see 45 CFR 1610.5.

Case Projections

Completed - Oct 10 2025

Cases

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

Yes. Lakeshore expects to exceed its projections in both limited service and full representation cases.

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

N/A. Lakeshore did not project it would close any PAI cases for this region in 2025.

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	70	5	75	9
Education	0	0	0	0
Employment	1	0	1	0
Family	20	10	30	4
Juvenile	0	0	0	0
Health	20	0	20	0
Housing	85	8	93	5
Income Maintenance	20	0	20	2

Individual Rights	15	0	15	0
Miscellaneous	460	4	464	2
Total Cases	691.0	27.0	718.0	22.0

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			
Education			
Employment			
Family			
Juvenile			
Health			
Housing			
Income Maintenance			
Individual Rights			
Miscellaneous			
Total PAI Cases	0	0	0

Pro Bono Attorneys

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

0

Staffing

Completed - Oct 10 2025

Staffing

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

No

Please explain any significant staff changes.

N/A

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	2		.3	2.3
Supervision of Legal Case Work	1			1
Secretarial Clerical Work			1	1
Management and Administration				
PAI Coordination or Pro Bono Management				
Other 1 (specify below)			1	1
Other 2 (specify below)				
Total	3.0	0	2.3	5.29

Other 1	Client Support Advocate
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	2			2
Supervision of Legal Case Work	1			1
Secretarial Clerical Work			1	1
Management and Administration				
PAI Coordination or Pro Bono Management				
Other 1 (specify below)			1	1
Other 2 (specify below)				
Total	3.0	0	2.0	5.0

Other 1	Client Support Advocate
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 10 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	137229
Total Beginning Fund Balances	137229.0

Current Year Revenues

Source of Funding	Current Year
a- IOLTA - Civil Legal Services Grant	27500
b- Filing Fees (1) General Civil Legal Services Grant	0
b- Filing Fees (2) Statewide Grant	0
c- Legal Services Corporation 1) Basic Field Grant	0
c- Legal Services Corporation 2) Other Grants & Revenue	0
d- Foundations (other than IOLTA or Filing Fee program funds)	0
e- United Way	0
f- 1) State Grants	0
f- 2) Local Grants	441148
f- 3) Community Development Block Grants	0
g- 1) Title III - Administration on Aging	67917
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	0
h- Faith-based funding	0
i- Law Schools	0
j- Attorney Fee Awards or Client Services Fees	0
k- 1) Access to Justice Fund	0
k- 2) Other Private Bar Fundraising	0
k- 3) Cy pres Awards	0
k- 4) Other donations/Fundraising	3000
l- Income from publications, training, videotapes & other products	0

m- Miscellaneous	772
Total	540337.0

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).

N/A

Current Year Projections - Civil Legal Services

Personnel Costs

	Current Year Projections
1. Lawyers	238617
2. Paralegals	0
3. Others	105438
4. Employee Benefits	104387
Total Personnel Costs	448442.0

Current Year Projections - Civil Legal Services

Non-Personnel Costs

	Current Year
1. Space	35000
2. Equipment Rental	
3. Supplies	13339
4. Telephone	4791
5. Travel	4662
6. Training	1356
7. Library	9280
8. Insurance	3927
9. Dues & Fees	1380
10. Audit	4982
11. Litigation	1649
12. *Property Acquisition	
13. Purchase Payments	
14. *Contract Services to Clients	66
15. *Contract Services to Program	6518
16. *Other	
Total NonPersonnel Costs	86950.0

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

Total Beginning Fund Balance	137229
Current Year Projected Revenues	540337
Current Year Projected Expenses	535392
Total Ending Fund Balance	142174.0

Breakout of Current Year Ending Fund Balance

The total below should equal the current year Ending Fund Balance of \$142174.0.

	Current Year
Ending Fund Balance in cash, investments & grants	142174
Ending Fund Balance in property and fixed assets	0
Total	142174.0

Donated Services and Property during Current Year

	Current Year
Services, including value of contributed attorney services	0
Donated property, including space	0
Total	0.0

Grant Year Financials

Completed - Oct 10 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 \$142174

	Grant Year
Ending Fund Balance in cash, investments & grants	142174
Ending Fund Balance in property and fixed assets	
Total	142174.0

Grant Year Revenues

Source of Funding	Grant Year
a- IOLTA - General Civil Legal Services Grant	34375
b- Filing Fees (1) General Civil Legal Services Grant	0
b- Filing Fees (2) Statewide Grant	0
c- Legal Services Corporation 1) Basic Field Grant	0
c- Legal Services Corporation 2) Other Grants & Revenue	0
d- *Foundations (other than IOLTA or Filing Fee program funds)	0
e- United Way	0
f- *1) State Grants	0
f- *2) Local Grants	441148
f- *3) Community Development Block Grants	0
g- *1) Title III - Administration on Aging	61250
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	0

h- Faith-based funding	0
i- Law Schools	0
j- Attorney Fee Awards or Client Services Fees	0
k- *1) Access to Justice Fund	0
k- *2) Other Private Bar Fundraising	0
k- *3) Cy pres Awards	0
k- *4) Other donations/Fundraising	3000
l- Income from publications, training, videotapes & other products	0
m- *Miscellaneous	775
Total	540548.0

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

N/A

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

St. Clair County Millage - \$441,148

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

N/A

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

Client Donations - \$3,000

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

Interest - \$775

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).

N/A

Grant Year Budgeted Expenditures - Civil Legal Services

Personnel Cost

	IOLTA/Filing	Other	Total
1. Lawyers	16974	226646	243620
2. Paralegals	0	0	0
3. Others	0	109547	109547
4. Employee Benefits	5150	102001	107151
Total-Personnel	22124.0	438194.0	460318.0

Grant Year Budgeted Expenditures - Civil Legal Services

Non-Personnel Costs

	IOLTA/Filing	Other	Total
1. Space	1439	37908	39347
2. Equipment Rental			
3. Supplies	2069	11676	13745
4. Telephone	1415	3471	4886

5. Travel	38	4718	4756
6. Training	104	1258	1362
7. Library	581	8884	9465
8. Insurance	1240	2766	4006
9. Dues & Fees		1380	1380
10. Audit	1694	3389	5083
11. Litigation		1682	1682
12. *Property Acquisition			
13. Purchase Payments			
14. *Contract Services to Clients		67	67
15. *Contract Services to Program	3671	5898	9569
16. *Other			
Total NonPersonnel Costs	12251.0	83097.0	95348.0

Property Acquisitions, including real property (line 12).

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

N/A

Contract Services to Clients (line 14)

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

Interpreter costs - \$67

Contract Services to Program (line 15)

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

Payroll Services - \$1,771
Employee Relations and Accounting Services - \$3,392
Technology Services - \$4,406

Other (line 16)

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

N/A

Grant Year Estimated Ending Fund Balance

Total Beginning Fund Balance	142174
Grant Year Projected Revenues	540548
Grant Year Projected Expenses	555666
Total Ending Fund Balance for the Grant Year	127056.0

Projected Donated Services and Property during Grant Year

	Grant Year
Services, including value of contributed attorney services	0
Donated property, including space	0
Total	0.0

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: 23%

Yes, Lakeshore's plan for the Eastern Service area is to apply for a multi-year grant, such as VAWA, in 2026.

Subgrants, Contracts or Agreements

Completed - Oct 10 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			
2			
3			
4			
5			
6			
7			
8			
9			
10			