

Application: LLA-M - 2026

LLA Lakeshore Legal Aid
Legal Services Annual Grant

Summary

ID: LS2026-0000000169

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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 civil legal services to people with low incomes and limited assets in the Metro region. Lakeshore's eight Metro offices, one of which houses the Counsel & Advocacy Law Line (CALL), provide services in distinct neighborhoods. These services are planned and coordinated with appropriate local partners and responsive to the unique needs of each community. Lakeshore coordinates its services with other legal aid providers and social service agencies across the region and the state to best serve our clients. Lakeshore's services include intake and pro se assistance, 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 its communities. They publicize the availability of Lakeshore services and encourage eligible members of the public to learn about their rights and obligations by contacting our central telephone intake and advice system, CALL. The lawyers at CALL diagnose callers' problems 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. To avoid duplication of services and to provide the highest level of service available, appropriate cases are also referred to other legal aid programs (Michigan Legal Services, United Community Housing Coalition, William Booth Clinic, etc.)

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

The Michigan State Bar Foundation funding impacts all of Lakeshore's work. MSBF funding provides leverage to obtain additional grants to fund its civil legal aid programs. Grants that support administration and other fixed costs, such as MSBF funds, are critical to Lakeshore's ability to employ over 208 individuals, provide legal support to residents of all 83 Michigan counties, and secure additional funding. With the support of MFBF funding, Lakeshore sustains grants from AgeWays, United Way of Southeast Michigan, the Legal Services Corporation (LSC), Oakland County Bar Foundation, Third Judicial Circuit Court of Michigan, UCH, Department of Veterans Affairs, Oakland Livingston Human Service Agency (OLHSA) Supportive Services for Veterans Families (SSVF), and others.

In 2025, Lakeshore received renewed funding from the Gilbert Foundation to support Detroit tenants facing eviction. Lakeshore also received additional funding in 2025 from the City of Detroit to expand its Instructional Materials project, which includes developing 45 instructional podcast-style videos and 24 fact sheets to help tenants navigate the 36th District Court. The funding also supports partnership kits to be shared with the Right to Counsel Coalition and the creation of an Intake and Income Verification Survey and Upload System.

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

With reduced revenues expected for the Metro region, Lakeshore is not anticipating expanding current services.

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

As one of the largest legal aid organizations in Michigan, Lakeshore is the primary resource for civil legal aid for residents in Wayne, Oakland, and Macomb counties. In Wayne County, the percentage of individuals whose household income fell below the federal poverty line was 20.6% in 2023. The data for 2024 is not yet available, but experts project that the percentage will be much higher. MSBF funding allows Lakeshore to provide legal services to this population of individuals who would otherwise be forced to navigate the legal system alone.

This funding allows Lakeshore to actively participate in housing task force meetings; engage in partnerships with domestic violence and senior service providers; and identify potential systemic legal issues. Lakeshore is also active in the private bar, leading access to justice efforts. Lakeshore surveys the private bar formally at least once per year in developing its Pro Bono Plan.

Last year, Lakeshore conducted community listening sessions to gain deeper insight into client needs. With this robust interaction in the community, Lakeshore is able to respond to the changing legal landscape and evolving client needs.

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:

Metro

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.

In the Metro region, Lakeshore closed 17,794 cases in 2024. Of these cases, approximately twenty percent involve evictions. Lakeshore continues to advocate for tenants at Detroit's 36th District Court, holding landlords accountable to provide safe conditions, challenging the court's process to ensure due process, and representing as many tenants as possible to prevent homelessness.

The system of rental registration and inspections for code compliance has been broken in Detroit since its inception in the 1980s. Two City of Detroit departments and community groups sought Lakeshore's input on proposed amendments to the rental health and safety ordinances. Lakeshore was invited to serve on a stakeholder workgroup to create the new policies and procedures for the implementation of the new ordinances.

Additionally, in the City of Pontiac, Lakeshore maintains a close relationship with the 50th District Court and partners with Christian Community Response Team (CCRT) to hold a twice-monthly in-person clinic to provide legal assistance and wrap around services to residents of Pontiac engaged in eviction suits and facing housing instability due to lack of resources to pay rent, utilities, and water. Demographically, Pontiac has a high percentage of rental housing with a large number of subsidized rentals, high levels of poverty, aging housing stock and the second highest eviction rate per capita in Oakland County. Lakeshore plays an important role in preserving housing through advocating for Pontiac renters by asserting defenses, challenging repeated bad actors who regularly charge illegal fees, misplace tenant recertifications, and try to evict tenants during a lease term without evidence of good cause.

Because of the combined efforts of the city, local district court, community partners and Lakeshore Legal Aid, rental housing practices and conditions in Detroit and the surrounding cities are getting the attention needed to improve housing stability and strengthen community.

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

In 2026, Lakeshore will increase private attorney participation by building on successful clinic programs, digital tools, and the county-based managing attorney model. Our thriving clinic model engages volunteers meaningfully and provides professional satisfaction. Family Law Assistance Project (FLAP) clinics, Home for Generations probate clinics, and expungement clinics give attorneys opportunities to advise clients, draft documents, and take on limited-scope cases. We are expanding training materials to support volunteers further, pairing law students and legal assistants with attorneys at clinics, and developing Home for Generations clinics to include estate planning drafting opportunities.

Lakeshore will leverage county-based managing attorneys to recruit, mentor, and support volunteers across all practice areas. Digital platforms, including the Justice Server Pro Bono Portal and Paladin, streamline case management and engagement, allowing volunteer attorneys to browse opportunities, access resources, and track cases efficiently. By combining personalized guidance from managing attorneys with user-friendly digital tools, Lakeshore will broaden volunteer involvement, strengthen attorney engagement, and ensure more clients receive critical legal services.

Lakeshore actively listens to volunteers and community partners to align volunteer opportunities with both attorney interests and community needs. By offering multiple pathways for involvement and accommodating professional availability, Lakeshore seeks to sustain and expand participation while connecting attorneys effectively with clients and critical legal issues across the Metro region.

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

With funding from the City of Detroit, Lakeshore created the Detroit Right to Counsel Content Hub that contains Know Your Rights materials about the legal process and housing law in English, Spanish, and Arabic. The Hub includes videos, flyers, and a toolkit for community organizations.

Lakeshore continues to integrate its Client Support Advocacy team to provide supportive, wraparound services to clients. The team is led by a licensed Master Social Worker and includes other formally trained social workers along with similarly qualified and experienced individuals.

Lakeshore's collaboration with the Wayne County Chiefs of Police has expanded and Lakeshore continues to train more law enforcement officers on how to manage parental kidnapping in abusive relationships. Additionally, new collaboration with the Michigan Veteran's Foundation, CNS HealthCare, and the Detroit Public Library resulted in family law and housing presentations in the community.

Lakeshore is also developing a new partnership with a consortium of mobile home advocates, Mobile Home Action Group. This multi-state group works to assert the rights of mobile home residents and is very active in southeast Michigan. Lakeshore's first engagement with the Mobile Home Action will be to provide education and best practices to mobile home residents asking for accommodations for disabilities.

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 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 began hosting 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 has effectively engaged the use of our case management system JusticeServer to gather and analyze data. Managers review quarterly data reports to examine and analyze the number of clients Lakeshore has served; the extent of the service; and the outcomes of the cases. Lakeshore consistently reviews data to monitor case numbers and client needs. 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 sends client satisfaction surveys to the client in every extended service case and addresses issues they identify. Additionally, client support advocates text a survey to every client with whom they work to gather feedback about the impact of their program.

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.

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, domestic violence survivors, and eviction prevention clients who meet AMI income limits 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, domestic violence survivors, and eviction prevention clients who meet AMI income limits 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 the final results, but salary and other financial terms may change with the final agreement.

Also, Lakeshore is projecting a reduction in LSC funding of 15% for 2026.

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

Cases

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

Lakeshore will close about 3% fewer cases overall than projected for 2025. Limited-service cases will be about 7% lower, but extended service cases will likely increase by about 7.5% over projections. These changes are the result of litigation and eviction teams focusing on extended representation cases rather than limited services. In addition, Lakeshore has allowed several litigation positions to remain open as staff left throughout the year, so overall staffing has decreased, resulting in slightly lower case closings.

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

Lakeshore expects to meet overall PAI case projections for the current year. Lakeshore projected it would close 483 cases for the year and is currently expected to close approximately 519. Lakeshore is likely to exceed the 295 projected advice and brief service cases, currently expecting to close about 363. For extended representation cases, however, Lakeshore projected closing 188 cases, but will likely close around 156.

The main difference in projections is individual rights cases, particularly expungements. This shortfall is partly due to a 10-month grant period during which Lakeshore handled many expungement cases in house by staff rather than placing them as PAI cases. The difference also reflects the trend of pro bono attorneys choosing to take more clinic opportunities and advice and brief service matters rather than extended representation cases.

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	1657	19	1676	1553
Education	18	2	20	14
Employment	4	0	4	3
Family	2393	258	2651	2064
Juvenile	105	9	114	98
Health	147	1	148	137
Housing	4252	2899	7151	2790
Income Maintenance	455	24	479	414
Individual Rights	237	53	290	68
Miscellaneous	557	9	566	331
Total Cases	9825.0	3274.0	13099.0	7472.0

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		5	5
Education			
Employment			
Family	135	15	150
Juvenile			
Health			
Housing			
Income Maintenance		3	3
Individual Rights	125	125	250
Miscellaneous	150	15	165
Total PAI Cases	410.0	163.0	573.0

Pro Bono Attorneys

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

150

Staffing

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Staffing

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

Yes

Please explain any significant staff changes.

The Pro Bono increase is due to additional staff work on the Expungement grant.

Other Legal case work is increased from what was initially submitted in the 2025 Metro Application because it initially contained an FTE calculation error that was lower than it should have been.

There is a reduction in FTE's for Legal case work as staff have left Lakeshore. Those positions have not been immediately filled in anticipation of funding cuts.

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	60.03	25.3	7	92.33
Supervision of Legal Case Work	15.2			15.2
Secretarial Clerical Work			9.6	9.6
Management and Administration	11.98		12	23.98
PAI Coordination or Pro Bono Management	5	3	1.5	9.5
Other 1 (specify below)			6.5	6.5
Other 2 (specify below)				
Total	92.21	28.3	36.6	157.11

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	47	16	4.4	67.4
Supervision of Legal Case Work	12			12
Secretarial Clerical Work			10	10
Management and Administration	12		12	24
PAI Coordination or Pro Bono Management	5	3		8
Other 1(specify below)			4	4
Other 2 (specify below)				0
Total	76.0	19.0	30.4	125.4

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

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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	2397574
Total Beginning Fund Balances	2397574.0

Current Year Revenues

Source of Funding	Current Year
a- IOLTA - Civil Legal Services Grant	3096447
b- Filing Fees (1) General Civil Legal Services Grant	2217864
b- Filing Fees (2) Statewide Grant	0
c- Legal Services Corporation 1) Basic Field Grant	5404768
c- Legal Services Corporation 2) Other Grants & Revenue	166667
d- Foundations (other than IOLTA or Filing Fee program funds)	1011892
e- United Way	125000
f- 1) State Grants	1257738
f- 2) Local Grants	1977440
f- 3) Community Development Block Grants	0
g- 1) Title III - Administration on Aging	127917
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	287500
h- Faith-based funding	0
i- Law Schools	0
j- Attorney Fee Awards or Client Services Fees	5000
k- 1) Access to Justice Fund	290000
k- 2) Other Private Bar Fundraising	0
k- 3) Cy pres Awards	0
k- 4) Other donations/Fundraising	17000
l- Income from publications, training, videotapes & other products	0

m- Miscellaneous	141938
Total	16127171.0

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	6950957
2. Paralegals	1473740
3. Others	2703138
4. Employee Benefits	3131362
Total Personnel Costs	14259197.0

Current Year Projections - Civil Legal Services

Non-Personnel Costs

	Current Year
1. Space	637973
2. Equipment Rental	
3. Supplies	285750
4. Telephone	85819
5. Travel	85440
6. Training	93561
7. Library	44722
8. Insurance	64974
9. Dues & Fees	82500
10. Audit	47757
11. Litigation	49429
12. *Property Acquisition	10000
13. Purchase Payments	
14. *Contract Services to Clients	8913
15. *Contract Services to Program	571661
16. *Other	2938
Total NonPersonnel Costs	2071437.0

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

Total Beginning Fund Balance	2397574
Current Year Projected Revenues	16127171
Current Year Projected Expenses	16330634
Total Ending Fund Balance	2194111.0

Breakout of Current Year Ending Fund Balance

The total below should equal the current year Ending Fund Balance of \$2194111.0.

	Current Year
Ending Fund Balance in cash, investments & grants	2073476
Ending Fund Balance in property and fixed assets	120635
Total	2194111.0

Donated Services and Property during Current Year

	Current Year
Services, including value of contributed attorney services	420000
Donated property, including space	30000
Total	450000.0

Grant Year Financials

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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 \$2194111

	Grant Year
Ending Fund Balance in cash, investments & grants	2073476
Ending Fund Balance in property and fixed assets	120635
Total	2194111.0

Grant Year Revenues

Source of Funding	Grant Year
a- IOLTA - General Civil Legal Services Grant	2912531
b- Filing Fees (1) General Civil Legal Services Grant	2217864
b- Filing Fees (2) Statewide Grant	0
c- Legal Services Corporation 1) Basic Field Grant	4472766
c- Legal Services Corporation 2) Other Grants & Revenue	151389
d- *Foundations (other than IOLTA or Filing Fee program funds)	1247731
e- United Way	125000
f- *1) State Grants	637178
f- *2) Local Grants	1125046
f- *3) Community Development Block Grants	0
g- *1) Title III - Administration on Aging	111250
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	250000

h- Faith-based funding	0
i- Law Schools	0
j- Attorney Fee Awards or Client Services Fees	5000
k- *1) Access to Justice Fund	290000
k- *2) Other Private Bar Fundraising	0
k- *3) Cy pres Awards	0
k- *4) Other donations/Fundraising	17000
l- Income from publications, training, videotapes & other products	0
m- *Miscellaneous	101925
Total	13664680.0

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

Gilbert Family Foundation - \$888,889, Gilbert Probate - \$184,675, TD Foundation- \$116,667, Oakland County Bar Foundation- \$57,000. These Foundations provide funding for general civil legal services.

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

3rd Circuit Court - \$90,000, MI Impact - (general civil) \$273,901, UCHC \$1,035,046.

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

Administration on Aging (senior civil legal) - \$111,250

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

Access to Justice - \$290,000

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

Internet - \$21,925

Local Initiatives Support Corporation - \$80,000

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).

Legal Services Corporation - (\$923,776), TD Foundation - \$116,667, Local Initiatives Support Corporation - \$80,000, 3rd Circuit Court - QLR - (\$270,000), UCHC - \$597,378

Grant Year Budgeted Expenditures - Civil Legal Services

Personnel Cost

	IOLTA/Filing	Other	Total
1. Lawyers	2586794	2838693	5425487
2. Paralegals	740175	290904	1031079
3. Others	299053	2392700	2691753
4. Employee Benefits	973172	2212357	3185529
Total-Personnel	4599194.0	7734654.0	12333848.0

Grant Year Budgeted Expenditures - Civil Legal Services

Non-Personnel Costs

	IOLTA/Filing	Other	Total
1. Space	121672	549282	670954
2. Equipment Rental			
3. Supplies	23634	270689	294323
4. Telephone	36859	51535	88394
5. Travel	7425	69374	76799
6. Training	4533	75789	80322
7. Library	6652	39412	46064
8. Insurance	6848	59425	66273
9. Dues & Fees	30000	40826	70826
10. Audit	14410	34302	48712
11. Litigation	9919	40498	50417
12. *Property Acquisition			
13. Purchase Payments		10000	10000
14. *Contract Services to Clients	1229	7862	9091
15. *Contract Services to Program	268020	177609	445629
16. *Other		3028	3028
Total NonPersonnel Costs	531201.0	1429631.0	1960832.0

Property Acquisitions, including real property (line 12).

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

Technology costs - capitalized - \$10,000

Contract Services to Clients (line 14)

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

Interpreter Language Services - \$8,841, Client Transportation (bus) - \$250

Contract Services to Program (line 15)

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

Technology (MSP) - \$251,331, Accounting & Payroll - \$46,666, Employee Relations - \$77,302, Security - \$9,500, Expungement Outside Contract - \$32,633, Forensic audit - \$9,830, Outside Contracts for coaching/internal training- \$18,367

Other (line 16)

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

Program wide meeting costs - \$3,028

Grant Year Estimated Ending Fund Balance

Total Beginning Fund Balance	2194111
Grant Year Projected Revenues	13664680
Grant Year Projected Expenses	14294680
Total Ending Fund Balance for the Grant Year	1564111.0

Projected Donated Services and Property during Grant Year

	Grant Year
Services, including value of contributed attorney services	420000
Donated property, including space	30000
Total	450000.0

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: 11%

Yes. Lakeshore's plan for increasing net assets is to continue to write multi-year grants (for example the Quality Legal Representation 3rd Circuit Court renewal) and obtain an increased funding stream.

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	Nura Lutfi	June 2, 2025 through December 31, 2025	Metro
2	Mary Novrocki	December 1, 2024 through September 30, 2025	Metro
3			
4			
5			
6			
7			
8			
9			
10			

Subgrant 1 Listed Above (upload here)

[LLA Nura Lutfi Contract for Legal Services.pdf](#)

Filename: LLA Nura Lutfi Contract for Legal Services.pdf **Size:** 329.1 kB

Subgrant 2 Listed Above (upload here)

[LLA Mary Novrocki Contract.pdf](#)

Filename: LLA Mary Novrocki Contract.pdf **Size:** 242.9 kB

CONTRACT FOR LEGAL SERVICES

This agreement is made between Lakeshore Legal Aid (hereafter Lakeshore), 30500 Van Dyke Suite 601, Warren, Michigan 48093, and Nura Lutfi (hereafter Lutfi), 3200 Greenfield Rd., Suite 320, Dearborn Michigan 48120 to provide civil legal representation to low-income individuals in Metro Detroit.

Effective June 2, 2025, Lakeshore contracts with Lutfi, to provide legal services in cases that are referred to her. Lutfi has the right to refuse any case that is referred to her. However, for the cases that Lutfi accept, the following terms shall apply:

1. For legal services provided, Lakeshore will pay at the rate of \$81.25 per billable hour for attorney work, \$40.63 per hour for paralegal work, and \$16.50 per hour for law clerk work. Billed amounts shall not exceed \$650 per day nor \$24,999 total for the overall contract.
2. Lutfi will invoice Lakeshore on a bi-weekly basis. The invoice should provide enough information regarding the activities completed during the billed time to support the invoice. Payment shall be made within 30 days following the submission and approval of each invoice and may be available via ACH. Invoices shall be uploaded in PDF format to LLAPayables@Avidbill.com. Lutfi will supply a completed federal form W-9 to the Accounting department at tfiehn@lakeshorelegalaid.org prior to payment.
3. Lakeshore shall have the right to review the legal services files to determine that appropriate action has been taken and that quality service has been provided.
4. Lakeshore agrees to provide case consultation assistance to Lutfi upon request. Lutfi agrees to abide by the terms of any already executed retainer agreements between Lakeshore and its clients that Lutfi agrees to represent.
5. Lutfi shall charge no fee for legal services provided to clients served under this contract but may require clients to pay for costs of service of process and for court fees or costs not waived or suspended pursuant to court rule. If a client is unable to pay costs associated with representation under this contract, Lakeshore shall be responsible for these costs provided those costs are approved by Lakeshore in advance of incurring such costs.

Funding for Lakeshore Legal Aid is provided in part by
Legal Services Corporation, Michigan State Bar Foundation, AgeWays Nonprofit Senior Services,
St. Clair County Commission on Aging/Senior Citizens Millage, United Way, and Oakland County Bar Foundation

6. Lutfi acknowledges that she is not an employee of Lakeshore. Lutfi and Lakeshore agree this is an Independent Contractor/Contractee relationship in keeping with the Department of Labor (DOL) Fact Sheet 13: Employment Relationship Under the Fair Labor Standards Act and Internal Revenue Service (IRS) Publication 15-A: Employers Supplemental Tax Guide.

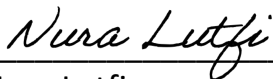
7. Lutfi agrees that she will not commence any appellate action without the prior approval of the Lakeshore's Chief Executive Officer or her designee.

8. Lutfi shall be entitled to any court ordered attorney fees or costs awarded to her during the representation of the clients served under this contract to the extent that receiving attorney fees or costs is consistent with Lakeshore's funding requirements and regulations.

9. This contract shall remain in effect until December 31, 2025, with the expectation that all work will be completed by that time. The contract may be renewed or extended only by written agreement of the parties.



Ashley E. Lowe
Chief Executive Officer
Date: 06/03/2025



Nura Lutfi
Attorney at Law
Date: 06/02/2025

CONTRACT FOR LEGAL SERVICES


This agreement is made between Lakeshore Legal Aid (hereafter Lakeshore), 30500 Van Dyke Suite 601, Warren, Michigan 48093, and Mary Novrocki (hereafter Novrocki), 5828 Winans Lake Road, Brighton, MI 48116 to provide civil legal representation to low-income individuals in Metro Detroit.

Effective December 1, 2024, Lakeshore contracts with Novrocki, to provide legal services in cases identified in the addendum to this contract. The following terms shall apply:

1. For legal services provided, Lakeshore will pay at the rate of \$81.25 per billable hour for attorney work, \$40.63 per hour for paralegal work, and \$16.50 per hour for law clerk work. Billed amounts shall not exceed \$650 per day nor \$35,000 total for the overall contract.
2. Novrocki will invoice Lakeshore on a bi-weekly basis. The invoice should provide enough information regarding the activities completed during the billed time to support the invoice. Payment shall be made within 30 days following the submission and approval of each invoice and may be available via ACH. Invoices shall be uploaded in PDF format to LLAPayables@Avidbill.com. Novrocki will supply a completed federal form W-9 to the Accounting department at tfiehn@lakeshorelegalaid.org prior to payment.
3. Lakeshore shall have the right to review the legal services files to determine that appropriate action has been taken and that quality service has been provided.
4. Lakeshore agrees to provide case consultation assistance to Novrocki upon request. Novrocki agrees to abide by the terms of any already executed retainer agreements between Lakeshore and its clients that Novrocki agrees to represent.
5. Novrocki shall charge no fee for legal services provided to clients served under this contract but may require clients to pay for costs of service of process and for court fees or costs not waived or suspended pursuant to court rule. If a client is unable to pay costs associated with representation under this contract, Lakeshore shall be responsible for these costs provided those costs are approved by Lakeshore in advance of incurring such costs.

Funding for Lakeshore Legal Aid is provided in part by
Legal Services Corporation, Michigan State Bar Foundation, AgeWays Nonprofit Senior Services,
St. Clair County Commission on Aging/Senior Citizens Millage, United Way, and Oakland County Bar Foundation

6. Novrocki acknowledges that she is not an employee of Lakeshore. Novrocki and Lakeshore agree this is an Independent Contractor/Contractee relationship in keeping with the Department of Labor (DOL) Fact Sheet 13: Employment Relationship Under the Fair Labor Standards Act and Internal Revenue Service (IRS) Publication 15-A: Employers Supplemental Tax Guide.
7. Novrocki agrees that she will not commence any appellate action without the prior approval of Lakeshore's Chief Executive Officer or her designee.
8. Novrocki shall be entitled to any court ordered attorney fees or costs awarded to her during the representation of the clients served under this contract to the extent that receiving attorney fees or costs is consistent with Lakeshore's funding requirements and regulations.
9. This contract shall remain in effect until September 30, 2025, with the expectation that all work will be completed by that time. The contract may be renewed or extended only by written agreement of the parties.



Ashley E. Lowe
Chief Executive Officer
Date: 6/30/25

Mary E. Novrocki

Mary Novrocki
Attorney at Law
Date: 7/10/25

Funding for Lakeshore Legal Aid is provided in part by
Legal Services Corporation, Michigan State Bar Foundation, AgeWays Nonprofit Senior Services,
St. Clair County Commission on Aging/Senior Citizens Millage, United Way, and Oakland County Bar Foundation