

Quarterly Report of Activities March 2026

I am pleased to present the following report on recent activities. Mary and Eleanor helped pull this report together. Please let me know if you have questions or would like additional details.

Grantees and Grant Funding

Since our last meeting, the Foundation has continued to advance key initiatives aimed at strengthening our grantmaking framework and enhancing support for grantee organizations.

In December, we held an Outcome Training session attended by approximately 30 individuals from grantee organizations. This training clarified reporting requirements and introduced newly developed outcome codes informed by partner feedback. To further improve reporting efficiency, we also launched a secure Grantee Resource Portal that provides real-time access to up-to-date documentation and hosts the recorded training for ongoing reference.

Significant progress has been made in formalizing our internal procedures, and we are finalizing the Standard Operating Procedures (SOP) for our special grants. During the first quarter, we undertook comprehensive aggregation and analysis of grantee data for special grant programs, which will support program refinement and strengthen our ability to secure future funding.

Within the Administration of Justice (AOJ) grant program, we have engaged prospective applicants to provide guidance on program priorities and competitive proposal development. Feedback indicates that these consultations are highly beneficial. Our strategic review of the AOJ grant program remains ongoing and we will be discussing process with the working group.

We issued a Grant Stabilization Grant Opportunity to provide one-time support in response to 2026 LSC funding reductions. This funding is intended to help grantees retain essential staff and prepare for future potential decreases in revenue. The FAC will review these recommendations and submit to Board for approval.

Special Projects

In 2025, MSBF initiated two parallel projects related to the Triage and Referral system, including: 1) the development of user surveys to solicit feedback from individuals who appeared pro se in court, or interacted with the Counsel and Advocacy Law Line (CALL), Michigan Legal Help (MLH), or SBM's Lawyer Referral Service (LRS); and 2) a business process analysis of CALL, given CALL's role as a statewide legal aid hotline.

Regarding the first project, we have developed a survey instrument for CALL/MLH/LRS and completed a pilot testing phase. All three organizations are currently administering the final user surveys, and we will review the first quarter's data in April 2026. We also developed a pro se court user survey with SCAO and are working through final approvals and administration logistics with the courts. We signed a second phase contract with Stout [Consulting] to develop the data analysis and evaluation phase of this project over the next 12-18 months. MSBF will collect CALL, MLH, LRS, and court user survey reports and incorporate these data in a visualization platform to analyze survey responses over time. We plan to develop processes for data sharing, ongoing analysis, and recommendations for system improvements.

Regarding the second project, what started as a business process project, has developed into a redesign of the triage and referral system in Michigan. This new system will not just be a change in CALL's processes, but a significantly re-designed model that better coordinates services between CALL, MLH, local legal aid programs, potentially LRS and other resources. On February 3rd, we hosted a full day workshop with 20 representatives from legal aid organizations to build a shared understanding of the new statewide triage model and identify challenges, risks and opportunities. We were pleased with the workshop and the confidence and buy-in was higher than anticipated, and the scored confidence and buy-in ratings were higher than expected. We have developed an implementation plan and are currently getting bids from consultants to continue this project.

Leadership/Partnerships/Training

I continue to participate on the Executive Team of the Justice for All Commission. The Commission is working on a pilot Licensed Legal Practitioner program and a court form redesign project. Peter Cunningham and I co-chair the JFA Resource Committee. We completed updating the Return on Investment Report for civil legal aid using 2023 and 2024 data (see report attached). In addition, the Commission was successful in obtaining funding from the state legislature to set up a grant program to fund self-help centers. There are now 45 centers, with 74 locations, serving 34 counties. I am also chairing a working group to analyze the need and funding for more self-help centers. We are currently working with self-help centers to develop data collection requirements and standards.

I continue to participate on the Executive Team of the Commission on Fairness and Public Trust. We are hosting a full day Court Leadership and Community Convening on April 17th.

We continue to wait for the Michigan Supreme Court on the administrative matters regarding Michigan Rules of Professional Conduct 6.1 (Pro bono and financial donations), MCR 2.606 regarding Qualified Settlement Funds and the MPRC 1.15 and the corresponding IOLTA Handbook for Financial Institutions.

I attended LSC's annual Technology Innovation Conference at the end of February. We had scheduled a pre-conference to discuss developing national support for AI innovation within the access to justice communities. I have attended several follow up meetings with representatives from Stanford Law about creating a Commons that will help vet, fund and support AI innovation.

Access to Justice Campaign

The ATJ Campaign runs on a calendar year. We have provided a full report about the results from the 2025 campaign.

Our new Development Associate, Kiera Tierney, began in January and is a great addition to the team. Erica Swierenga is transitioning out of the Development Associate role into the Engagement Manager role. We are working with Quattro to hire a Chief Development Officer, and they have putting together a pool of vetted candidates for us.

We are pleased to report that our major gift initiative met their 2025 goals --- 15 individuals and firms committed to give at the \$10,000 level. We created a Champions of Impact recognition to recognize firms and individuals that give over \$10,000.

We are planning an event, Inspiring Impact through the ATJ Campaign, on April 23rd at Warner Norcross + Judd's offices in Grand Rapids. Chief Justice Megan Cavanagh is speaking along with the President of WNJ and LAWM's Board Chair. We are inviting individuals that are capable of making significant gifts and or providing leadership to their firms on giving gifts.

Fellows

We have scheduled the 2026 Fellows Reception for Thursday September 17th at the Detroit Marriott in Troy. We are in the process of completing our 2025 MSBF Annual Report that will be distributed along with requests for nominations.

IOLTA Program

IOLTA programs continue to navigate opposition across the country. Specific litigation and state legislative actions vary, but arguments primarily focus on mandatory participation in a program that funds advocacy efforts allegedly favoring one political party over another, and alternative uses for the interest generated on IOLTA. Of note, a New Hampshire bill directing IOLTA funds to the public defender's office was defeated; North Carolina's IOLTA program is currently operating under a grantmaking freeze as they work with their legislature on a long-term agreement; and appellate litigation continues in Maine after a federal court dismissed an IOLTA challenge on First Amendment grounds. Michigan is not currently facing any IOLTA challenges, but we continue to monitor the cases in other states.

Eleanor Avsharian continues to manage the IOLTA compliance process, monitor interest rates, and field attorney and financial institution questions about the IOLTA program. Following three consecutive interest rate cuts in late 2025, the Federal Reserve held interest rates steady at 3.50% - 3.75% during the January 2026 FOMC meeting. Financial institution IOLTA rates remain stable and MSBF received a December average net yield of 2.22%, nearly identical to our reported IOLTA rate for September 2025.

In addition to our compliance and reporting oversight, MSBF continues to maintain its Banking on Justice Campaign. In January, Eleanor participated in the FDIC's Southeast Michigan Alliance for Economic Inclusion Meeting and presented information about the Banking on Justice program to participating community investment officers and banking executives seeking community development initiatives. The number of Banking on Justice participating institutions also increased to fifteen (15) after Northern Trust and UMB Bank elected to join the program. The current rate for participation is 2.81%.

MSBF is continuing its plan to develop an Account Enrollment System (AES). This new system will allow attorneys to upload IOLTA Notice of Enrollment forms directly into our database, thereby improving data collection, IOLTA reporting, attorney/bank oversight, and coordination with SBM's Interim Administrator Program. We finalized project proposals with Delta Consulting and Information Logistics (ILC) in late December and are currently updating MSBF's IOLTA Notice Form to clarify noted attorney and bank confusion while awaiting final development scheduling with ILC.

Governance and Administration

We completed the FY25 audit and updated our cost and functional expense allocation. We also migrated to a new Professional Employer Organization, CoStaff.

We continue to work on updating our technology policies. In addition, we have updated several internal standard operating procedures and are working on updating others.

Celee Marchek, the Finance Associate, informed us that she is retiring effective May 5th. Celee has been with the Foundation for 31 years. Celee prefers not to have a party but welcomes cards. Feel free to send them to the Foundation and we will forward them to Celee.

We have posted the Finance Associate position and hope to have overlap with Celee for training purposes.

Communications

We distributed a Fellows Newsletter on November 25, 2025. We included information about annual grants, highlights from the Fellows Reception, new Board members, and a list of new Fellows. We are working on a newsletter that will go out in the next couple of weeks.

At the end of 2025, we partnered with two grantees to produce in-house videos for the ATJ Campaign about the importance of year end giving and did social media posts about the campaign.

MSBF has a Facebook and LinkedIn account. As of March 3, 2026, we have 690 followers on LinkedIn (a 7.1% increase since November) and 186 followers on Facebook (a 3.2% increase since November). If you are active in social media, we encourage you to follow and reshare our posts.