

Quarterly Report of Activities June 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

We are in the process of reviewing the 2025 Grantee Annual Reports and the data tells some compelling stories. In 2025, despite funding uncertainty, grantees were able to increase the number of cases that received full representation by an attorney. Additionally, grantees handled roughly 600 more cases and individuals represented by an attorney received a positive result in their case 97.45% of the time. Attached in the materials is a summary of 2025 grantee activities.

Since the last board meeting, we have convened an Administration of Justice Grant Purpose and Process Working Group, which consists of current and former board members. We reviewed national data and reviewed our grant process and questions that arise often when reviewing grants. We have begun to draft an updated definition, set of priorities, and criteria for the grant program. When the working group finishes our tasks, the drafts will be reviewed by the AOJ Project Grant Committee for feedback and ultimately the full board for final approval. We are optimistic that these new guiding materials will help us to clarify the grant program's goals, while providing guidance to future applicants, staff and the grant committee.

We continue to meet with grantees that receive special grants regularly to monitor and refine our approaches to supporting legal aid to clients with Supplemental Security Income, Eviction, and Unemployment cases. We made changes to the reporting to streamline data collection and also get meaningful feedback about impacts and challenges.

In May, we hosted another full day Legal AI Lab Workshop for grantees, led by Bridgette Carr and Vivek Sankaran from the University of Michigan Law School. The training focused on streamlining workflows, drafting legal documents and improving access to justice.

We are starting conversations with MSHDA and LEO about partnering to sustain the eviction diversion programs. On May 20th, Jennifer attended a full day with state legislators, organized by the Council of Michigan Foundation, about housing work, including eviction prevention.

Special Projects

MSBF continues to manage two projects related to accessing Michigan's civil legal aid system – the development of user surveys with ongoing data analysis, and a redesigned, statewide triage and referral system.

Regarding the first project, we recently collected Q1 survey data from the Counsel and Advocacy Law Line (CALL), Michigan Legal Help (MLH), and SBM's Lawyer Referral Service (LRS), and are working with Stout [Consulting] to develop a data visualization platform that will facilitate analysis of user experiences. This visualization will also incorporate census, court, and other datasets to better understand how Michigan's triage and referral systems are working, or not working, for those with civil legal issues.

We also finalized the pro se court user survey with SCAO and are awaiting court approval to begin piloting the survey in volunteer courts. Over time, we hope to expand this survey to all Michigan courts. We anticipate the pilot process will begin in Fall 2026 after courts have completed their Public Satisfaction Survey process. In partnership with the current working group and JFA Commission, we plan to then develop processes for data sharing, ongoing analysis, and recommendations for system improvements.

Regarding the second project, we are in the process of working through implementation of the new triage and referral system. Kim Craig and Lisa Colpoys were hired consultants to manage the project. We have a core work group including individuals from CALL, MLH, MSAS, Mary and Jennifer. 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.

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. I am also chairing a working group to analyze the need and develop criteria for funding self-help centers and courts that want to participate in the navigator program.

I continue to participate on the Executive Team of the Commission on Fairness and Public Trust and served on the working group that hosted a full day Court Leadership and Community Convening on April 17th. We had approximately 100 participants, including judges and court administrators. We focused on understanding user experience and developing strategies to improve the experience.

The Michigan Supreme Court has not yet issued a decision 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.

Jennifer attended ABA Day with Nathan Triplett, Justice Brian Zahra, Judge John Hallacy, Wendy Richards and Lisa Hamameh to advocate for increased federal funding for Legal Service Corporation. In 2026, the LSC programs experienced a 3.6% decrease, which was approximately \$615k in Michigan.

Jennifer is co-chairing a NAIP technology affinity working group to share information about technology projects and grants. The work group is also continuing work with Stanford Law to develop a Commons that will help vet, fund and support AI innovation.

In April, Traci attended a financial training sponsored by the Council of Michigan Foundations called Grow & Learn, Together, focused on best practices and networking for CFOs in philanthropy.

In March, Mary Gladstone-Highland, the Director of Grants, attended the annual Peak Grantmaking Conference and recently attended the National Association of IOLTA Program's Funders' Roundtable and the Equal Justice Conference which were both held in Charlotte, NC.

Access to Justice Campaign

We had an ATJ event, Inspiring Impact through the ATJ Campaign, on April 23rd at Warner Norcross + Judd's offices in Grand Rapids. Chief Justice Megan Cavanagh attended and spoke. We also had a Lansing law firm President's lunch on May 13th. Justice Noah Hood attended and spoke.

We have been attending numerous events and also giving presentations about the ATJ Campaign. We presented to the SBM Board of Commissioners on April 24th and to the Ingham County Bar Association on May 20th. We attended the Barristers Ball, the Brunch for Bars, the SBM 50th honoree lunch and the MSCHS lunch. We were notified that Lawlapalooza will be held on July 31st at the Magic Bag in Ferndale and proceeds will benefit the ATJ Campaign.

We are continuing to meet with prospect leadership firms. In addition, a few new individuals have contributed at the \$10,000 level and a few others are considering a higher gift.

With expanded capacity for the campaign, including follow up with donors and prospects, we have been assessing the best use of committee member time. We have also been streamlining the processes for our donor database, including updating regular SBM member data.

Fellows

We published our 2025 MSBF Annual Report and opened our Fellows Nomination process. We also streamlined our Fellows pledge process and will be doing regular payment reminders.

The Fellows Reception is scheduled for Thursday September 17th at the Detroit Marriott in Troy. We are currently confirming dates for a virtual orientation.

IOLTA Program

In positive news, the First Circuit affirmed the dismissal of the lawsuit challenging the constitutionality of Maine's IOLTA program. We continue to monitor state legislative actions which vary by state, but arguments primarily focus on alternative uses for the interest generated on IOLTA. We also recently drafted an IOLTA Refund Policy in response to a line of questioning in the Maine appellate case regarding refunds for client funds erroneously placed in an IOLTA account instead of an individual client trust account.

Eleanor Avsharian continues to manage the IOLTA compliance process, certify new eligible financial institutions, monitor interest rates, and field attorney and financial institution questions about the IOLTA program. After three consecutive interest rate cuts in late 2025, the Federal Reserve held interest rates steady at 3.50% - 3.75% in its first three meetings of 2026. Financial institution IOLTA rates were lower over the last quarter, likely in response to the late 2025 federal rate reductions, and as expected in our financial projections. MSBF's March 2026 average net yield was 2.04%, as compared with a December 2025 average net yield of 2.22%.

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. Information Logistics (ILC) is currently developing the new system and anticipates it will be ready for testing soon. As part of this project, we are also revising MSBF's IOLTA Notice Form to integrate with the new system and clarify attorney and bank confusion.

Over the last quarter, Eleanor has participated in several National Association of IOLTA Programs (NAIP) software workgroups to review ongoing challenges and solutions within various IOLTA databases and to ensure that MSBF is maintaining a secure, sustainable IOLTA database. We also continue working with Delta Consulting and Information Logistics (ILC) to plan custom report development and modify our current database to continuously improve user experience, reporting accuracy, data analysis, and staff efficiency.

Finally, we are in the process of developing new IOLTA materials and website content that will clarify the IOLTA program for attorneys and financial institutions. In addition, the new and edited content will include financial institution Frequently Asked Questions, allow MSBF staff to more efficiently update eligible institution and Banking on Justice partner lists, and ensure IOLTA documents and instructions are easily accessible.

Governance and Administration

We have hired a new Chief Development Officer, Devon Meier, who starts June 15th. Devon graduated with AB in English from University of Michigan and then obtained her Master of Arts Management. She obtained her Certificate in Fundraising Management from Indiana University. She has been working in development since 2008, first at St. Jude's and most recently as the Director of Philanthropy at Rose Hill Foundation.

We hired a new Finance Associate, Michelle Maier. Michelle started April 20th. Michelle graduated with a BA in Accounting and then obtained her law degree. Michelle has held various legal and accounting positions, most recently as a Fund Accountant with Ingham County.

We have updated several internal policies and continue to work on updating our technology policies. We also updated several policies for the Board to approve, that will be presented by the Executive Committee. Traci Kuiper worked on policies based on sample policies from numerous sources. Traci and Jennifer modified to meet the needs of MSBF.

We have a new PEO and are currently working through personnel policies, including PTO accrual, PTO carryover, work expectations, and hybrid policies.

Communications

Since March, communications from the Foundation have remained steady, with our continued effort to reach our target audience, the legal community, through our established multi-channel strategy: print, digital, and social media. We increased our use of RE NXT to communicate directly with our broad audience, with a strong emphasis on personalization.

We are grateful for the partnership and support of the State Bar of Michigan, as they continue to feature the Foundation's work in the monthly *Michigan Bar Journal*.

Our use of social media serves as both an amplifier of other communications and a channel for sharing new information.

This has contributed to the continued growth of our social media presence, particularly on LinkedIn, which remains our strongest platform for reaching the legal community. We publicized the 2026 Fellows nominations, the 2025 MSBF Annual Report, Foundation award recipients, and press releases related to Banking on Justice campaign institutions. In addition, we use social media to educate audiences about civil legal aid, share client success stories, and provide event recaps—supporting increased visibility for the Foundation's work and strengthening engagement with attorneys across Michigan.

Social Media Performance:

- LinkedIn: 714 followers (**+3.5% growth since March**), continuing as our strongest platform for reaching the legal community and driving engagement with Foundation content
- Facebook: 195 followers (**+4.8% growth since March**), with steady audience expansion and continued support for storytelling and outreach efforts

If you are active in social media, we encourage you to follow and reshare our posts.