

# The Right Time to Work for JUSTICE

## Our Mission

The Wisconsin Trust Account Foundation works with civil legal aid organizations in Wisconsin to increase access to justice. We oversee funds and invest in services and projects to help people resolve legal problems.



Annual Report | Wisconsin Trust Account Foundation, Inc.

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## Chairperson’s Message

In any given year, the legal services providers that WisTAF funds empower individuals in crisis to overcome legal problems and barriers — that is what they do; it is literally another day at the office for them. But it would be an understatement to say that 2020 brought new challenges for legal aid organizations and their clients. No one expected the upheaval of economic, social, and family life that descended on the world this past year. And as is often the case, those who have the least resources have frequently been the most vulnerable to the chaos wrought by the COVID-19 pandemic. But I am proud to say that WisTAF grantees rose to meet the daunting unanticipated and additional challenges facing their clients.

With impressive energy and admirable adaptive capacity, and against the backdrop of a global health crisis, civil legal aid providers in Wisconsin found new ways to advocate for those in need. They identified problems that rose dramatically to the forefront in a wave of pandemic-driven phenomena — such as the urgent need for more assistance to the increased number of individuals seeking unemployment benefits in a suddenly-overloaded system — quickly assessing and tackling issues as they developed, and uniformly with their clients’ best interests in mind.

WisTAF also adapted to the new environment, thanks to the stellar leadership of Executive Director Rebecca Murray and our talented staff, IOLTA Program Manager and Office Manager Tehmina Islam; Grants Program Manager Carlos Arenas; and Communications and Development Manager Benson Gardner. In a time of turmoil, WisTAF’s dedicated and efficient team powered through, continuing to ensure that existing grants were administered seamlessly, as well as orchestrating grants for grantees who incurred pandemic-related, unexpected technological and sanitization expenses. Through their tireless efforts, WisTAF’s operations pressed forward without interruption. In fact, staff increased efforts to learn more about grantees’ needs through initiatives such as participation in the newly-formed Civil Legal Aid Alliance of Wisconsin and virtual grantee gatherings.

The events of 2020 also brought long-overdue attention to racial disparities in our society. Created this year, the Racial Justice Workgroup of the WisTAF Board of Directors is studying and implementing steps to ensure that we do everything in our power to identify and eliminate racial injustice within the organization. Likewise, we recognize that the need for racial equity must inform us as we exercise our critical function as a funder of civil legal aid throughout the state. The workgroup is composed of Board and staff members, all of whom have embraced the group’s efforts and have generously shared their time and insights within an accelerated meeting schedule that reflects the importance of this work.

Amid the many changes in 2020, I am proud to acknowledge that one thing has remained constant: the unwavering commitment of our Board of Directors. Having served and been involved in various capacities with other non-profit organizations and their boards, I can say without hesitation that WisTAF’s board is special. Our Board members’ sincere interest in and support for the organization’s mission is evident in every meeting and every discussion that we have as a full board, in our Grants and Finance committees, and in our new Racial Justice Workgroup. Their collective stewardship is imbued with intelligence and empathy alike, qualities that immeasurably benefit WisTAF as a whole.

I would also be remiss if I did not recognize and express our collective gratitude for the many contributions of my predecessor, Larry Burnett, now Chairperson Emeritus. Under Larry’s direction, WisTAF’s board adopted strategic goals that powerfully define priorities designed to guide the organization to achieve its full potential. Because of Larry’s service, WisTAF is positioned to become an even more vital and energetic force in funding and promoting legal aid in Wisconsin.

As we move forward to confront the challenges of the year ahead, in an environment altered in many ways by the pandemic, we are full of respect and appreciation for the efforts of all who continue to devote their time and energy to providing legal services to Wisconsinites in need. To borrow the eloquent and inspiring phrase of Dr. Martin Luther King, Jr., may they continue to “hew out of the mountain of despair a stone of hope.”

April Rockstead Barker, *Chairperson*

“The opposite of poverty is not wealth; the opposite of poverty is **justice**.”

— Bryan Stevenson, *Just Mercy: A Story of Justice and Redemption*

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We’re proud  
to play a  
leadership  
role in  
Wisconsin’s  
civil legal aid  
landscape.

## Impact

In 2020, the Wisconsin Trust Account Foundation (WisTAF) provided funding that directly helped **10,899** people, spread across every county in Wisconsin, to access the civil justice system. The flexibility of WisTAF funding also makes it play an outsized role in providers’ work to fill gaps in the civil justice system, making it easier to direct aid where people need it most. Grantees in WisTAF’s largest grant program, for example, served more than 30,000 people drawing on a range of fund sources in 2020.

Thanks to WisTAF-funded services, including counsel from attorneys, clients addressed life-altering challenges and obtained the justice they’re entitled under the law. All over Wisconsin, people avoided wrongfully losing their homes and jobs, secured their safety through restraining orders, protected their health or veterans’ benefits, and—one person at a time—helped strengthen their communities.

“CRLA funding has really forever changed the way Wisconsin Judicare will provide services to clients and communities.”

— Wisconsin Judicare



“This client was quite literally brought to tears when we called to inform her that her case had been approved.”

— Catholic Charities of Milwaukee





## Executive Director’s Message

I doubt you’ll be surprised to hear 2020 posed challenges to clients, providers, and everyone else in the world of civil legal aid. What might surprise you is the extent to which organizations doing this work successfully collaborated, in the middle of those challenges, to increase our collective impact for people in Wisconsin. The civil legal aid field in Wisconsin is better positioned now than any time in recent memory to help bring about a future where everyone can access justice in pursuit of their health, safety, self-sufficiency, and independence, regardless of income.

As the pandemic unfolded, civil legal aid providers faced heartbreaking levels of need in the system. At the same time, like so many others, providers were developing remote operations, supporting family members, and learning to navigate a very new normal. But, as always, they persevered. Despite the circumstances, the number of clients to whom our grantees provided legal assistance using funding from WisTAF in 2020 was nearly identical to the total number from 2019. (The hardships of the pandemic were evident, however, in a sharp increase in those who had to be turned away for lack of resources.)

Much like our grantees, WisTAF faced numerous challenges in 2020. But there were consolations to be found, and it turned out to be a year in which opportunity met preparation. Our 2019 strategic plan had identified goals to ratchet up WisTAF’s leadership to help more people access justice in Wisconsin. We added a new communications and development staff position just one month before the pandemic hit. We leveraged mutually beneficial banking relationships to stem the initial tide of IOLTA income loss. We researched and implemented tools to improve our data collection and management systems, and made prudent updates to our governing documents. And, we reaped the benefits of our pre-pandemic development of remote-work and meeting infrastructure. At the time, we had no idea how crucial our proactive efforts to define our role, prioritize our focus areas, and strengthen our resources would prove to be. And by we, I am referring to our accomplished “Wis-staff” and the truly dedicated WisTAF Board of Directors, for whom I am grateful.

During upheaval that could have made us reflexively retreat to an inward focus, postponing ambitious plans, I’m thrilled to say WisTAF did the opposite. We stepped up to the plate, offering support and leadership to our grantees and other organizations in the spirit of collaboration. In 2020, our staff took the lead in nurturing development of the coalition now taking root as the Civil Legal Aid Alliance of Wisconsin. We also organized five online gatherings of WisTAF grantee organizations in 2020. Our previous strategic goal was to organize only two gatherings, in person, in 2021 and 2022. We modified that goal because we quickly saw the need for the community to provide information and encouragement to each other during unprecedented times. In 2021, other civil legal aid stakeholders tell us the new level of coordination in the field facilitates everything from easing professional isolation to requesting increased public investment.

It’s because our board and staff worked deftly to define our strategic position prior to the pandemic that even during COVID-19, we were able to start a new, systemic improvement project: our Racial Justice Workgroup founded and perceptively led by Atty. April Rockstead Barker, chairperson of our Board of Directors. As an organization dedicated to justice, this work is crucial to living up to our mission.

In the end, 2020 was the right time to work for justice—because widespread suffering proved we couldn’t afford not to, because our past groundwork gave us the opportunity to make a bigger difference than ever, and because (to paraphrase another quote from Dr. Martin Luther King, Jr.) the time is *always* right to work for justice. Through our continued, intentional action, we expect the number of people in Wisconsin who can experience justice, safety, stability, and self-sufficiency will only grow.

Rebecca L. Murray, *Executive Director*

## Staff

**Executive Director**  
Rebecca L. Murray

**IOLTA Program/Office Manager**  
Tehmina Islam

**Grants Program Manager**  
Carlos Arenas

**Communications & Development Manager**  
Benson Gardner

## About Wisconsin Trust Account Foundation, Inc.

What good are laws in protecting your rights and liberties if you can’t afford a lawyer? There’s no constitutional guarantee to an attorney in any civil case—cases outside of criminal law. And yet, civil law addresses situations that stand in the way of achieving personal safety, security, and independence.

In a complex system like ours, without an attorney it’s often hard to know when the law is on your side, let alone how to argue your case or follow procedures to ensure your protection. All too often, people with limited means are shut out of meaningful participation in Wisconsin’s legal system. The Wisconsin Trust Account Foundation, Inc. (WisTAF) exists to address this issue. A 501(c)(3) nonprofit corporation established in 1986 by the Wisconsin Supreme Court, we are the leading state-based funder of legal aid in Wisconsin.

For over three decades, WisTAF has awarded and overseen \$61.8 million in grants to dozens of organizations throughout the state. Our investment helps the most vulnerable residents in every Wisconsin county to access services that open the door to the justice system—including advice and representation from attorneys. With this access, clients can pursue the legal outcomes needed to realize stability, health, and self-sufficiency, in turn benefitting our state as a whole.

## Mission

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## Steadied by Strategy

WisTAF’s strategic plan continues to help us work toward long-range goals even while responding to unforeseen demands and areas of concern.

Our four strategic priorities, which address new ways of creating value for WisTAF stakeholders, remain unchanged:

- Engage in strategic grant making to fund unmet needs
- Diversify and expand and funding sources
- Educate the public and key stakeholders about WisTAF mission and results
- Increase collaboration/coordination among providers and stakeholders in the civil justice system

We’ve exercised fluidity on some goals within these areas. For example, our Pandemic Response Grants represented a pivot under the first priority area. The original plan is available at [wistaf.org](http://wistaf.org).



## Partners

Big goals aren't achieved in isolation; we are actively engaged in creating and improving partnerships. We salute the organizations and individuals who helped us achieve our mission in 2020.

“We are proud to have a partnership with WisTAF which assists us in providing access to trust accounts for law offices in our area.” — The Pineries Bank, 2020 Facebook post

### IOLTA Participating Financial Institutions

Institutions' commitment to the communities they serve is reflected in their participation in the Interest on Lawyers' Trust Accounts (IOLTA) program, which provides funding support for civil legal aid.

A total of 177 Wisconsin financial institutions maintained IOLTA accounts during 2020. During this tough year, a large number joined the ranks of those that also waive service fees on the accounts, so that 100 percent of the interest supports community members in need. About 85 percent of IOLTA participating institutions now waive

fees. Additionally, we acknowledge the generosity of **International Bank of Amherst** and **State Bank Financial** for charitable contributions to address pandemic conditions. A full listing of eligible IOLTA participating financial institutions can be found at [wistaf.org](http://wistaf.org).

### Prime Partner Financial Institutions

Strong communities are good for business. Prime Partner financial institutions go above and beyond by paying interest at least 50 basis points (0.50 percent) higher than required under Wisconsin Supreme Court IOLTA participation requirements.

### 2020 Prime Partners

Bank Five Nine  
Bank of Sun Prairie  
Citizens Bank (Mukwonago)  
Citizens Community Federal  
Farmers State Bank (Hillsboro)  
First Business Bank  
Forte Bank  
Home Savings Bank  
Mound City Bank  
Peoples State Bank (Prairie du Chien)  
State Bank Financial

## The Civil Legal Aid Alliance of Wisconsin (Civil LAAW)

During 2020, WisTAF provided the bulk of the staff time to ensure the successful take-off of the nascent collaboration which began in late 2019 among a large group of Wisconsin civil justice stakeholders. The coalition agreed on its name, Civil Legal Aid Alliance of Wisconsin (Civil LAAW), and made significant progress on organizational foundations which will be important in future endeavors. Civil LAAW is fulfilling the goal of strengthening, through collaboration, each member organization's work toward a shared vision: helping all people access the justice system. Current projects include coordinated sharing of information and communications related to the state budget process as well as a racial justice training project. WisTAF is proud to play a leading role in this work alongside members of the Wisconsin Access to Justice Commission (representing organizations such as the Wisconsin Supreme Court, Wisconsin's two law schools, community foundations, and the Wisconsin Counties Association), the State Bar of Wisconsin, many of WisTAF's grantees, and smaller state-based funders of legal aid.



## Grantees

WisTAF's 2020 grant recipients continue to provide help to the most vulnerable members of our society with dedication, skill, and innovation:

**ABC (Advocacy and Benefits Counseling) for Health, Inc.** is a nonprofit public interest law firm serving families throughout Wisconsin on legal issues related to health care access and financing.

**Catholic Charities of the Archdiocese of Milwaukee, Inc.** is a nonprofit charitable organization serving over 13,000 families annually in the areas of Adult, Family & Children, and Social Ministries.

**Catholic Charities of the Diocese of La Crosse, Inc.** provides programming in the areas of immigration services, emergency support services, adoption services, financial counseling, domestic abuse services, services for children with disabilities, and ministries including the HIV/AIDS Ministry Project.

**Center Against Sexual and Domestic Abuse (CASDA)** provides free services to individuals hurt by domestic, sexual, or child abuse, as they advocate for a community effort to end violence.

**Centro Legal** is a nonprofit corporation whose primary purpose is to provide legal representation to the poor and those with limited resources for a reasonable and accessible price in the Milwaukee area.

**Community Justice, Inc.** is a nonprofit corporation that provides legal services to Madison-area low-income families and individuals on a sliding-fee scale based on federal poverty guidelines.

**Disability Rights Wisconsin** defends the rights of people residing in Wisconsin's public and private institutions, and represents individuals under the Americans with Disabilities Act through information and referral, direct legal representation, and in limited situations, class action litigation.

**End Domestic Abuse Wisconsin (RISE Law Center)** provides quality, affordable direct legal representation to low income survivors of Domestic Violence & Sexual Abuse, primarily immigrants and refugees

with limited English proficiency, in an effort to prevent and eliminate violence in intimate partner relationships.

**Golden House** is a private, nonprofit agency that provides safety and support for victims of domestic abuse, while leading community efforts to end domestic violence in Brown County.

**HAVEN, Inc. (Household Abuse Victims Emergency Network, Inc.)** is a free community service providing a safe and confidential environment to empower all survivors of domestic violence and sexual assault through sheltering, advocacy, and education.

**Indianhead Community Action Agency** is a private, nonprofit agency that assists individuals in achieving self-sufficiency by providing the resources, education, and services necessary to develop healthy families, sustainable communities, and strong local businesses.

**Kids Matter Inc.** provides legal services and other advocacy for children in foster and kinship care in the greater Milwaukee area.

**Legal Action of Wisconsin, Inc.** serves low-income clients in the areas of family law and domestic violence, housing, public benefits, special education, and economic development.

**Legal Aid Society of Door County** is a volunteer organization that operates primarily as a screening and referral source to coordinate legal services through local pro bono attorneys.

**Legal Aid Society of Milwaukee** provides family law, public benefits, landlord-tenant, consumer, municipal ordinance defense, and civil rights law to low-income people in Milwaukee.

**LOTUS Legal Clinic, Inc.** serves victims of gender-based violence and human trafficking through trauma-informed legal advocacy, policy initiatives, education, and survivor empowerment.

**Metro Milwaukee Mediation Services, Inc.** assists homeowners and their mortgage services in avoiding preventable foreclosures, and facilitates an informed and respectful transition in those instances where foreclosures are not avoidable.

**Portage County Legal Aid Society** is a volunteer attorney legal service that addresses the need for pro bono civil legal services for indigent persons in Portage County.

**Rainbow House Domestic Abuse Services** provides prevention, education, and information to communities, families, and schools with the goal of obtaining safety and empowerment for all victims of domestic abuse.

**Vivent Health (including former AIDS Resource Center of Wisconsin)** is committed to being a respectful, caring partner serving everyone affected by HIV through comprehensive, integrated programs including legal services.

**The Women's Center** provides safety, shelter, and support to all affected by domestic violence, sexual assault, human trafficking, and child abuse in Waukesha County.

**Winnebago Conflict Resolution Center, Inc.** provides mediation services and training in mediation and conflict resolution statewide.

**Wisconsin Judicare, Inc.** provides civil legal assistance, information, and education to low-income people, Native Americans, and others who might otherwise be denied access to justice.

**Women's and Children's Horizons** provides services to survivors of domestic abuse and sexual assault that enhances their safety, well-being, and self-sufficiency.



## Grant Programs

### Direct Legal Services (DLS)

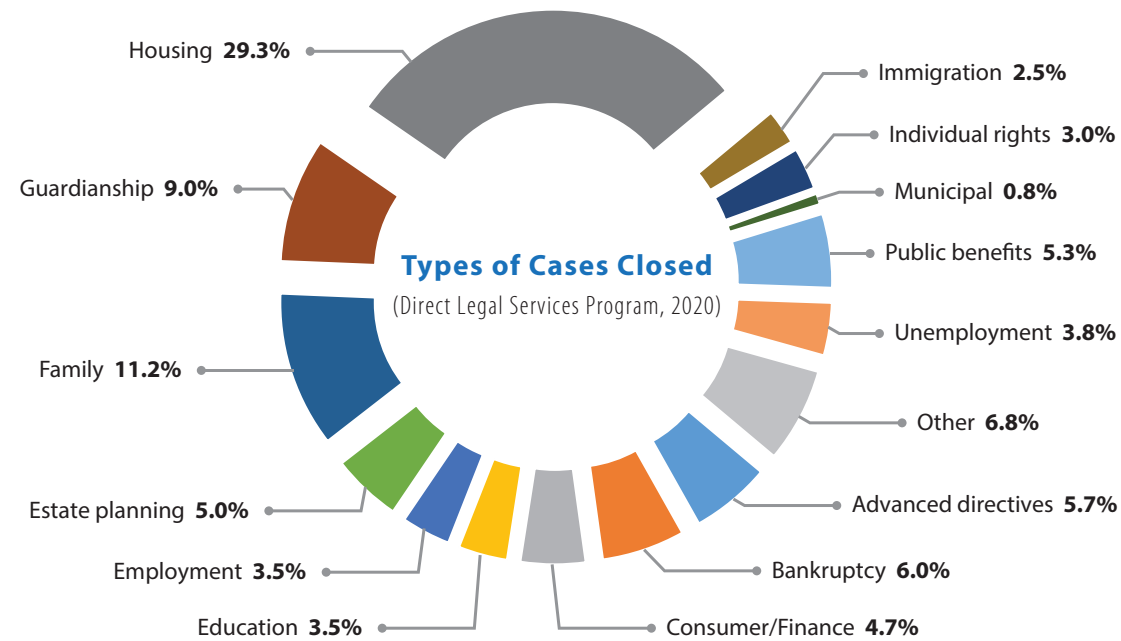
Within a few years, 62-year-old “Joyce” went from homeowner and successful businesswoman to someone who for the first time in her life, couldn’t pay her rent. After a chronic disease made it impossible to consistently ply her trade — designing and creating special-event dresses — Joyce gave up her home. She moved in with her mother, faithfully paying her portion of the rent. But, her mother passed away just before COVID-19. With the pandemic choking Joyce’s niche in the fashion industry — proms, weddings, and other public occasions — Joyce had no way to earn extra money to cover her mother’s share. **Legal Aid Society of Milwaukee met her at home, ensured she navigated government procedures correctly to stay in her apartment** under the national eviction moratorium, then helped arrange with Joyce’s landlord for her to stay a few extra months at a reduced rate while she looked for a new place. This planned move-out arrangement let the landlord avoid a sudden vacancy while collecting some rent, while Joyce avoided the stigma of an eviction record that would have made her apartment search futile. She secured a new place to live and has planned to resume her business part-time as the pandemic receded.



*The skills of dress designer “Joyce” are obvious from creations like these, but chronic disease, a family member’s death, and COVID-19 teamed up to imperil her housing.*

WisTAF’s largest and longest-standing grant program helps low-income people solve major problems in their lives. Grants to **15 organizations** across the state provided services of legal advice or representation to more than **8,000 clients** in 2020. In more than 60 percent of those cases, clients had a lawyer by their side, long term.

A conservative estimate of cases involving a specific monetary outcome indicated providers in the DLS program brought back a total of \$27.8 million for clients in the form of rightful insurance coverage, child support, unemployment compensation, and more.



### Domestic Violence and Sexual Abuse Civil Legal Services (DVSA)

During the 2019-2020 grant cycle, **14 legal aid groups and domestic violence shelters** around the state received grants from this program, allowing nearly **900 clients** to address critical civil legal problems related to domestic violence and sexual abuse.



After being brought illegally to the United States as a victim of human trafficking, “Eva” dreamed of remaining securely in this country, but there were technical obstacles blocking her path to employment and safety. She needed dismissal of a retail theft ticket (the result of a coerced act by her trafficker), reinstatement of her driver’s license, and assistance with a federal visa application (paperwork which can be daunting even when English is your first language and you don’t suffer from trafficking trauma). **LOTUS Legal Clinic provided the legal expertise and representation so that Eva can now legally, proudly work and provide for herself and her own future, regardless of her past victimization.** She is enjoying a better life herself, and is contributing to the betterment of society.

### A Global Pandemic Long Before the COVID-19 Outbreak

As one provider described, in the early months of the pandemic, reports of family violence decreased—but not because people were safer. “While it is not likely that the incidents of abuse decreased during this time, service delivery was impacted by the fact that victims were forced to make incredibly difficult decisions. Is it safer to leave an abuser or remain at home to avoid exposure to the virus?” This sentiment was echoed by numerous other grant recipients.

The crisis only worsened during lockdown as stress mounted and was compounded by income loss, medical debt, the confines of close quarters, and the absence of typical support systems.

Grantees subsequently reported a spike in legal needs faced by family violence survivors. As in past years, WisTAF awarded grants resulting in the best possible utilization of available funds in areas with greatest need.



“Katie” was horrified when her husband of over ten years was arrested for sexually assaulting their niece, and devastated to learn he had also been assaulting their children. The pain and harm were overwhelming enough. The added stress of the ongoing criminal case, changed economic circumstances, and a divorce would have been too much to handle on her own. With the help of an attorney from Legal Action of Wisconsin, Katie gained sole custody of her children, with her husband denied contact, and was awarded her husband’s assets and retirement accounts because she would not have other support while he was incarcerated. **Katie later told Legal Action she didn’t know if she would have had the strength to find employment if she had needed to represent herself in the divorce.** For Katie and many other victims in Wisconsin, representation and resolution in civil legal matters is critical for correcting the damage caused by their abusers, and helping them to achieve economic independence and financial stability.



**Disability Rights Wisconsin expressed concern about the added mental trauma and raised questions about the plan for treating James’ mental health so he can heal and improve,** as opposed to conditions that impede these goals. James was ultimately released from observation status, and staff began working with him to create a treatment plan so everyone can move forward.



## Foreclosure Prevention and Community Redevelopment Legal Assistance (FP/CRLA)

The Foreclosure Prevention and Community Redevelopment Legal Assistance program (FP/CRLA) catalyzes exciting new practices that help low-income individuals and families stay in their homes and become economically self-sufficient, while simultaneously working at the community level to stabilize and revitalize groups facing disadvantage.

Funded via a one-time settlement between the U.S. Department of Justice and Bank of America related to claims of

mortgage-related fraud leading up to the financial crisis of 2007-2008, the FP/CRLA program supports strategies such as partnering with job centers in northern Wisconsin, building legal aid collaborations with neighborhood groups in Milwaukee, and providing mediation options in housing cases. Grantee organizations report the program has allowed transformational change in the way they do their work, and has paved the way for organizations to build expertise and experience in new areas of law.

2020 was the second year of the Community Redevelopment Legal Assistance initiative; the Foreclosure Prevention arm of the program began in 2017, expanding to include eviction prevention in 2020.

The number of clients increased 68 percent over 2019, even while tapping a constant level of WisTAF investment, as providers and their community partners built on early successes and responded to demands related to COVID-19.



Collaborative efforts are common in the FP/CRLA program, involving landlords, mortgage-lenders, tenants, homeowners, and community agencies. When a single mother of four faced possible homelessness due to eviction, **the staff mediator from Metro Milwaukee Mediation Services, Inc. worked with numerous partners to navigate a complex solution helping the family to remain housed, the landlord to receive past-due rent, and the tenant's future not to be threatened.** Community Advocates paid the tenant's past due rent, the Milwaukee County Housing Division helped identify a place for her to move and transfer her Section 8 public housing assistance voucher, and landlord's counsel helped negotiate with his client 10 additional days for the tenant to stay in the property so her new apartment would be ready and available. The mediator helped finalize the agreement so the eviction matter was dismissed; on moving out, **Legal Aid Society of Milwaukee will assist with sealing the eviction record**—critical so the renter will not lose her Section 8 voucher.

In 2020, WisTAF grantees used FP/CRLA funding to help more than 2,000 clients stay in their homes, find jobs, grow their businesses, or address other challenges.

In cases where a specific monetary outcome was known at case closing, providers in the CRLA program brought back a total of \$1,288,826 for 352 clients.

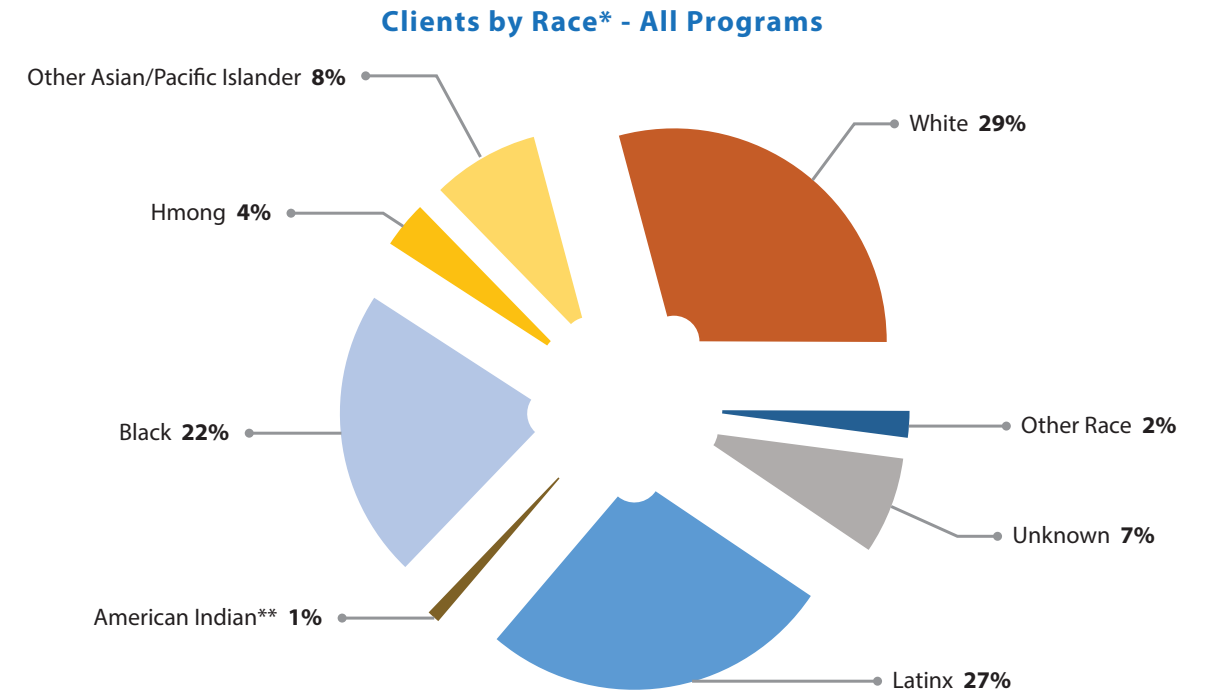


**“We are now known and trusted by neighborhood agencies that contact us regularly for legal assistance for residents and who we in turn contact regularly for feedback and insights. We have come light years in that regard and the WisTAF CRLA grant is the reason.”**

– Colleen Foley, executive director, Legal Aid Society of Milwaukee

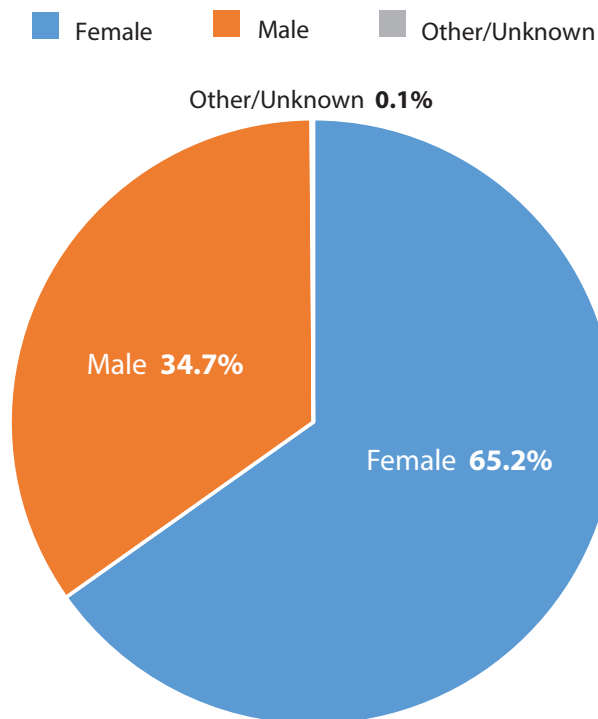
## Demographics

WisTAF grants serve people from every county in Wisconsin, representing a diversity of races and backgrounds.

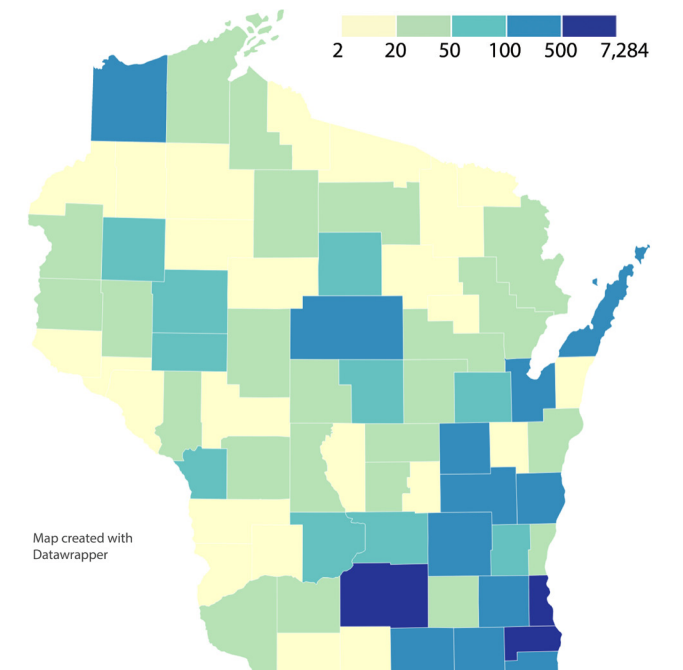


\*Percentages are approximate because of differing definitions of racial identities. \*\*Civil legal aid also receives public support through alternate avenues for members of Wisconsin Indian Nations.

### Clients by Gender – All Programs



### WisTAF-Funded Services by County (All Programs)



# Financials

In 2020, WisTAF disbursed \$2.8 million to serve 10,899 clients across Wisconsin. While significant, this funding falls far short of the estimated \$30 million-plus that would have been needed to meet the civil legal service needs of Wisconsin’s low-income families in the era even prior to the COVID-19 pandemic.

## Fund Sources

WisTAF grants in recent years have drawn on the following fund sources.

### Interest on Lawyers’ Trust Accounts (IOLTA)

In the IOLTA program, attorneys pool short-term or nominal deposits made on behalf of clients or third parties into one account. The interest generated by these accounts is remitted to WisTAF for use in grantmaking to support legal aid. Most participating financial institutions additionally waive fees or provide increased interest as a way to support their communities.

### Public Interest Legal Services Fund (PILSF)

In 2005, the Wisconsin Supreme Court established the Public Interest Legal Services Fund (PILSF), citing its necessity in maintaining “the integrity and efficiency of the judicial system within this state” and “the heightened obligations of lawyers, both to our justice system and to assist this Court with the effective administration of justice.” The Fund plays a critical role in supplementing erratic IOLTA funding with a more stable revenue source for civil legal services for

low-income Wisconsinites. PILSF funds are directly attributable to the state’s attorneys and judges, and are distributed throughout Wisconsin’s judicial districts.

### State Appropriation

Wisconsin’s lawmakers and governor have in various years invested state budget resources for civil legal aid grants administered by WisTAF. The current state allocation of \$500,000 per year in federal TANF funding began with the 2015-2017 budget. The support comes through the Wisconsin Department of Children and Families for a WisTAF-administered grant program supporting legal services for survivors of domestic violence and sexual abuse (DVSA). A previous allocation came through the Department of Administration (DOA).

### U.S. Dept. of Justice Settlement with Bank of America

Through a 2014 United States Department of Justice settlement with Bank of America, IOLTA programs nationwide received one-time funds for foreclosure prevention and community

redevelopment legal assistance (FP/CRLA — see page 8).

### Pro Hac Vice

By order of the Wisconsin Supreme Court, a portion of the *pro hac vice* admission fees paid by nonresident lawyers to participate in a particular action in Wisconsin is allocated to WisTAF to help support civil legal services for low-income and indigent persons.

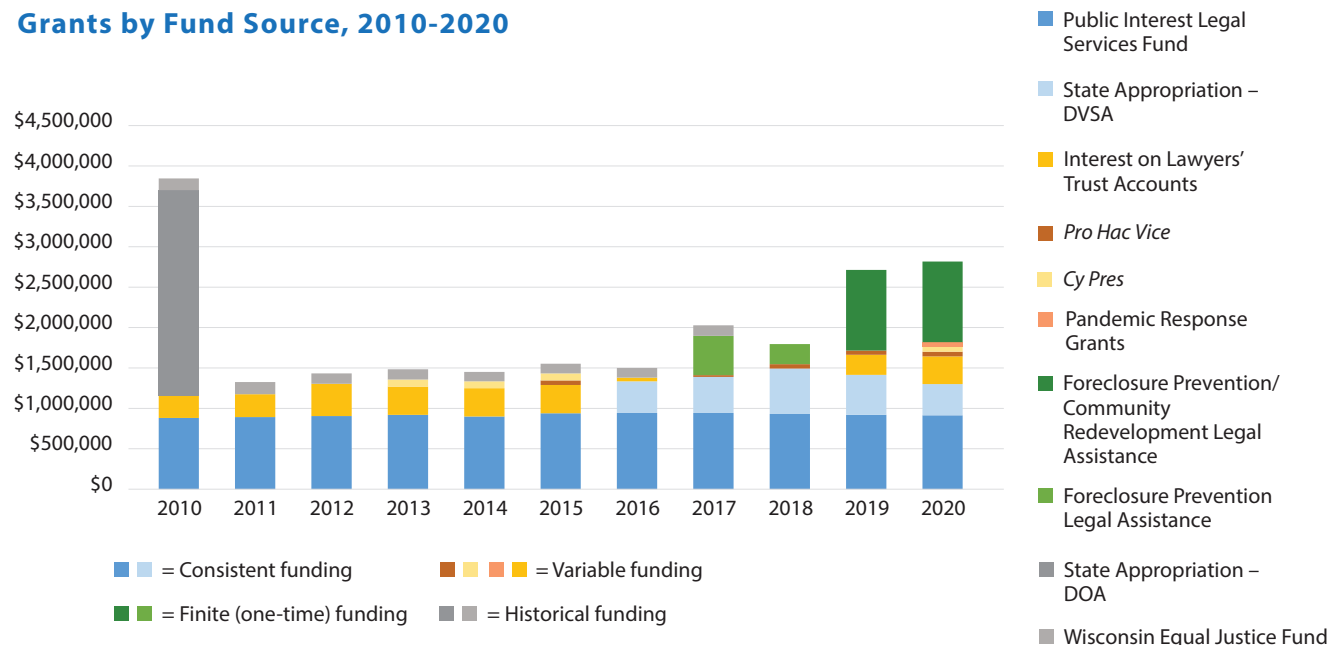
### Cy Pres

Wisconsin statutes require that WisTAF receive at least half of any residual funds left over from class action lawsuits filed in Wisconsin state court, in order to provide civil legal aid. In this category of funding, falling under the legal doctrine of *cy pres*, WisTAF can also receive other residual funds from class actions, restitution, settlements, or penalties.

### Donations

WisTAF also receives donations from individuals, corporations, and any other source with an interest in providing access to justice in Wisconsin.

Grants by Fund Source, 2010-2020



# Statement of Financial Position

| ASSETS  | 2020*              | 2019*              |
|---|--------------------|--------------------|
| Cash . . . . .                                    | \$1,266,302        | \$1,316,900        |
| Accounts receivable . . . . .                     | 105,226            | 168,505            |
| Grants receivable . . . . .                       | 48,064             | 30,964             |
| Prepaid expenses . . . . .                        | 11,160             | 8,414              |
| Investments . . . . .                             | 3,891,118          | 4,476,982          |
| <b>Total assets . . . . .</b>                     | <b>\$5,321,870</b> | <b>\$6,001,765</b> |
| LIABILITIES                                       |                    |                    |
| Accounts payable . . . . .                        | \$8,682            | \$3,571            |
| Grants payable . . . . .                          | 93,447             | 364,185            |
| Accrued expenses . . . . .                        | 17,158             | 8,652              |
| <b>Total liabilities . . . . .</b>                | <b>\$119,287</b>   | <b>\$376,408</b>   |
| <b>NET ASSETS (unrestricted) . . . . .</b>        | <b>\$5,202,583</b> | <b>\$5,625,357</b> |
| <b>Total liabilities and net assets . . . . .</b> | <b>\$5,321,870</b> | <b>\$6,001,765</b> |

# Statement of Activities

| REVENUE  | 2020*              | 2019*              |
|--|--------------------|--------------------|
| Trust account interest income (IOLTA) . . . . .                  | \$1,181,126        | \$1,525,210        |
| Public Interest Legal Services Fund (PILSF) . . . . .            | 913,250            | 920,000            |
| State appropriation (DVSA) . . . . .                             | 468,731            | 525,330            |
| <i>Cy pres</i> income . . . . .                                  | 118,627            | 70,586             |
| <i>Pro hac vice</i> fees . . . . .                               | 66,700             | 61,100             |
| Federal relief grant . . . . .                                   | 40,600             | 0                  |
| Investment return . . . . .                                      | 126,945            | 379,044            |
| Other . . . . .  | 6,519              | 4,014              |
| <b>Total revenue . . . . .</b>                                   | <b>\$2,922,498</b> | <b>\$3,485,284</b> |
| EXPENSES   |                    |                    |
| Program services (grant awards program) . . . . .                | \$3,084,318        | \$3,027,784        |
| Supporting activities . . . . .                                  | 257,492            | 207,697            |
| <b>Total expenses . . . . .</b>                                  | <b>\$3,341,810</b> | <b>\$3,235,481</b> |
| <b>Change in net assets without donor restrictions . . . . .</b> | <b>(419,312)</b>   | <b>249,803</b>     |
| <b>Net assets - beginning of year . . . . .</b>                  | <b>\$5,625,357</b> | <b>\$5,375,554</b> |
| <b>Net assets - end of year . . . . .</b>                        | <b>\$5,206,045</b> | <b>\$5,625,357</b> |

\*These are audited figures. Audit available upon request.



| Portfolio of Grants Disbursed During 2020 <i>(Cash basis)</i> |  | Direct Legal Services |                 |                  |                 | Pandemic Response Grants | Foreclosure Prevention / Community Redevelopment Legal Assistance | Domestic Violence and Sexual Abuse Legal Service | Total 2020         |
|---|--|-----------------------|-----------------|------------------|-----------------|--------------------------|---|--|--------------------|
|   |  | PILSF                 | Pro Hac Vice    | IOLTA            | Cy Pres         |                          |   |  |                    |
| Grantee   | Area Served  |                       |                 |                  |                 |                          |   |  |                    |
| ABC for Health  | Statewide  | \$46,800              | \$0             | \$0              | \$0             | \$3,054                  | \$0   | \$0  | \$49,854           |
| Catholic Charities of the Archdiocese of Milwaukee            | 10 counties in southeastern Wisconsin  | \$20,000              | \$0             | \$0              | \$0             | \$0                      | \$0   | \$0  | \$20,000           |
| Catholic Charities of the Diocese of La Crosse                | 19 counties in western, southwestern, and central Wisconsin                          | \$15,000              | \$0             | \$0              | \$0             | \$5,000                  | \$0   | \$0  | \$20,000           |
| Center Against Sexual & Domestic Abuse (CASDA)                | Ashland, Bayfield, and Douglas counties  | \$18,500              | \$0             | \$0              | \$0             | \$3,050                  | \$0   | \$39,379   | \$60,929           |
| Centro Legal por Derechos Humanos, Inc.                       | Milwaukee and Waukesha counties  | \$29,600              | \$0             | \$0              | \$0             | \$5,323                  | \$0   | \$54,445   | \$89,368           |
| Community Justice, Inc.                                       | 14 counties in southern and southwestern Wisconsin                                   | \$16,200              | \$0             | \$0              | \$0             | \$0                      | \$9,000   | \$37,787   | \$62,987           |
| Disability Rights Wisconsin                                   | Statewide  | \$118,400             | \$0             | \$0              | \$0             | \$7,000                  | \$0   | \$0  | \$125,400          |
| End Domestic Abuse Wisconsin                                  | Statewide  | \$0                   | \$0             | \$0              | \$0             | \$0                      | \$0   | \$33,749   | \$33,749           |
| Golden House, Inc.  | Brown and Kewaunee counties  | \$0                   | \$0             | \$0              | \$0             | \$0                      | \$0   | \$29,094   | \$29,094           |
| Household Abuse Victims Emergency Network (HAVEN, Inc.)       | Lincoln County   | \$0                   | \$0             | \$0              | \$0             | \$0                      | \$0   | \$12,310   | \$12,310           |
| Indianhead Community Action Agency                            | 9 counties in northern, northwestern, and northcentral Wisconsin                     | \$0                   | \$0             | \$0              | \$0             | \$0                      | \$0   | \$46,499   | \$46,499           |
| Kids Matter Inc.  | Milwaukee and Waukesha counties, limited services statewide                          | \$35,000              | \$0             | \$0              | \$0             | \$5,000                  | \$0   | \$34,760   | \$74,760           |
| Legal Action of Wisconsin, Inc.                               | 39 counties in southern Wisconsin  | \$346,549             | \$47,300        | \$274,000        | \$49,351        | \$0                      | \$500,000   | \$23,968   | \$1,241,168        |
| Legal Aid Society of Door County                              | Door County  | \$11,000              | \$0             | \$0              | \$0             | \$92                     | \$0   | \$0  | \$11,092           |
| Legal Aid Society of Milwaukee, Inc.                          | Milwaukee County   | \$98,511              | \$0             | \$0              | \$9,189         | \$5,000                  | \$178,000   | \$0  | \$290,700          |
| LOTUS Legal Clinic, Inc.                                      | Statewide  | \$16,200              | \$0             | \$0              | \$0             | \$0                      | \$0   | \$5,731  | \$21,931           |
| Metro Milwaukee Mediation Services, Inc.                      | Statewide  | \$0                   | \$0             | \$0              | \$0             | \$0                      | \$40,000  | \$0  | \$40,000           |
| Portage County Legal Aid Society                              | Portage County   | \$18,000              | \$0             | \$0              | \$0             | \$1,350                  | \$0   | \$0  | \$19,350           |
| Rainbow House Domestic Abuse Services, Inc.                   | Marinette and Oconto counties  | \$0                   | \$0             | \$0              | \$0             | \$0                      | \$0   | \$17,365   | \$17,365           |
| The Women's Center  | Southeastern Wisconsin   | \$0                   | \$0             | \$0              | \$0             | \$0                      | \$0   | \$8,362  | \$8,362            |
| Vivent Health (formerly ARCW)                                 | Statewide  | \$25,000              | \$0             | \$0              | \$0             | \$10,000                 | \$0   | \$0  | \$35,000           |
| Winnebago Conflict Resolution Center, Inc.                    | Winnebago County   | \$0                   | \$0             | \$0              | \$0             | \$0                      | \$20,000  | \$0  | \$20,000           |
| Wisconsin Judicare, Inc.                                      | 33 counties in northern Wisconsin and 11 federally recognized Native American tribes | \$100,240             | \$11,820        | \$68,500         | \$4,440         | \$10,000                 | \$250,000   | \$29,210   | \$474,210          |
| Women and Children's Horizons                                 | Kenosha County   | \$0                   | \$0             | \$0              | \$0             | \$0                      | \$0   | \$13,083   | \$13,083           |
| <b>TOTAL</b>  |  | <b>\$915,000</b>      | <b>\$59,120</b> | <b>\$342,500</b> | <b>\$62,980</b> | <b>\$54,869</b>          | <b>\$997,000</b>  | <b>\$385,743</b>                                 | <b>\$2,817,212</b> |