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2020 LLAF Report

It is my privilege to submit this report to the Members on behalf of the LLAF Board.

Foundation Meetings

The Annual Meeting of the Foundation was held on January 13, 2020 in conjunction with the Annual Meeting of the Lycoming Law Association. The Foundation Board also held meetings every quarter and special meetings as needed to respond to grant requests and the proposal to amend the by-laws.

Foundation Board Governance

The Foundation Board's By-laws, Investment Policy, Spending Policy, and Grant Application Form are posted on the LLA website for easy access by all our members. The Foundation Board proposed an amendment to the By-laws to expand the board from five to nine members with the goal of increasing participation in the three functions of the foundation: raising; investing; and, spending money. That money is used to promote justice, the legal system, and public legal education.

Fund Management

Woodlands Bank continues to serve as the repository for our funds. Attorney Tom Burkholder, long time LLA member and Woodlands Trust Officer responsible for our account retired at the end of 2020 from the bank. He has been replaced by Jeanette Kitchen. The Fund continued a stable conservative investment policy with modest gains consistent with the market in 2020. Our goal continues to be to increase the principal of the fund to the point that earned interest will support the anticipated grants.

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Fund Raising

To celebrate the 30th year of the foundation we conducted a \$30 for 30 campaign that raised \$4,950. In 2020 arbitration fees resulted in contributions of \$10,050 to the Foundation. We continue to receive Memorial Contributions when an LLA member dies. Each of you are encouraged to consider a bequest to the Foundation in your personal estate planning and that of your clients who support the goals of the Foundation.

Fund Expenditures

Grant requests typically are submitted to the Community Outreach and Activities Committee of the LLA. That committee reviews the grant applications and submits recommendations to the Foundation Board. This Covid-19 year saw fewer requests and some unusual opportunities for positive publicity for our Association. As Joe Rider said in his report last year: "Please remember that any publicity we receive enhances the reputation of each and every one of the Association Members." In 2020 the fund made the following grants:

Grant to North Penn Legal Services: As in past years the Foundation provided \$8,040 to North Penn Legal Services from the Arbitration Fee contributions.

Grant to Susquehanna Valley Court Appointed Special Advocates (CASA): The Foundation provided \$7,237.04 to help fund an additional case manager dedicated to serving Lycoming County.

Extraordinary Projects

PBA Matching Grants: The Board worked with the PBA Foundation to create a program for small grants. The PBA Foundation has an annual grant program that distributes funds via a process that takes six to nine months from application to dispersal. We proposed a pilot program for Unit Counties (we are one) that allows for matching grants to be awarded within weeks or days of the application. The PBA Foundation accepted our proposal and the pilot program will begin in 2021.

Landlord-Tenant Mediation Program: The CARES Act established a block of money for grants to local non-profits to assist with Covid-19 emergencies. \$12,500 was available to North Penn to establish a landlord-tenant mediation program. Since North Penn lawyers often represent tenants, they could not administer the fund. Your Foundation Board agreed to accept and administer the fund. Unfortunately, the short life of the grant (October-November) meant that much of the money had to be returned. However, four mediations occurred to assist with keeping those families in their homes during the pandemic.

Finally, the Board would like to extend a special thanks to Michele Frey, the LLA Executive Director for her tireless support of not just the Association, but also your Foundation.

Respectfully submitted,

S/ William Arbuckle

William Arbuckle

President, LLA Foundation

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