

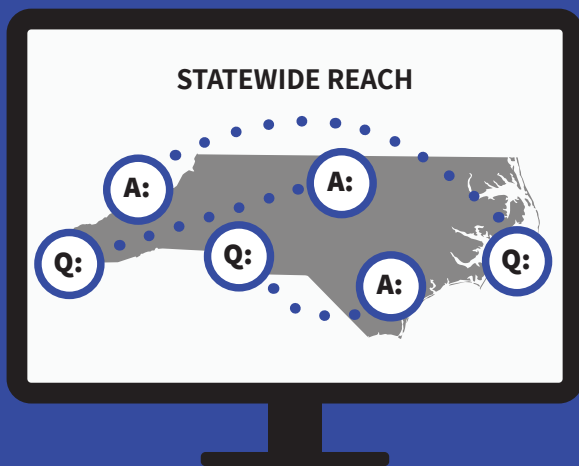


# North Carolina Bar Foundation 2019-20 IMPACT REPORT

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CELEBRATING NCBF VALUES, PROGRAMS + DONORS

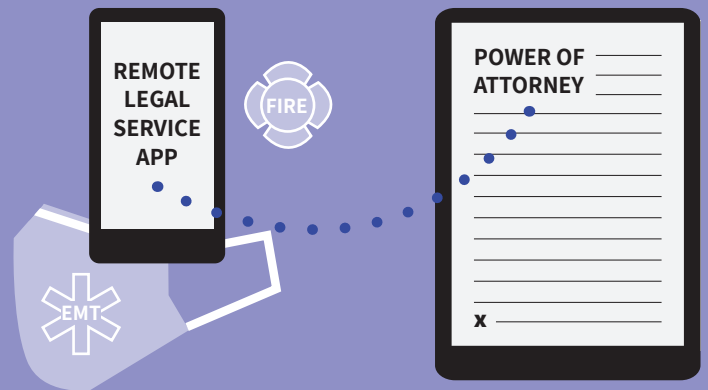
## Access to Justice

—  
NC FREE LEGAL ANSWERS



## Service through the Profession

—  
REMOTE LEGAL CLINICS



## NCBF COVID-19 Response

—  
VIRTUAL LEGAL HOTLINES



## Civic Education

—  
LAWYERS IN SCHOOLS



# From the Executive Director

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The 2019-20 bar year represented a key milestone for the North Carolina Bar Foundation, as it reached the 60th anniversary of its founding. This anniversary has given us an opportunity to reflect on the Foundation's journey as a way of framing the bright future that lies ahead. The events of the past year have also demonstrated how quickly the ground can shift, creating new needs for many, and the important role that the Foundation plays in meeting and adapting to new legal needs in our state.

The Foundation's work is made possible by the gracious generosity of its donors and volunteers. The Foundation's Endowment was created in 1987, and it has since made more than \$6 million in grants in the form of more than 750 grant awards. The Foundation's Legal Aid of North Carolina Fund began in 2007 with a lead gift from Charles Dixon, and now has a value that exceeds \$2.3 million, providing meaningful support to the operations of LANC.

We have much to celebrate in reflecting on the work of the Foundation's programs:

- NC Lawyers for Entrepreneurs Assistance Program (NC LEAP) was launched in 2007 as a project of the North Carolina Bar Association Business Law and Corporate Counsel Sections and is the only statewide program of its kind. Since its inception, over 3,000 small business owners have been assisted by the program.
- The Wills for Heroes Program, launched by the NCBA Young Lawyers Division in 2007, provides free wills, powers of attorney and health care powers of attorney to North Carolina first responders. In 2019-20, the NCBF held six Wills for Heroes clinics across the state, where 188 volunteers produced 630 estate planning documents for 210 first responder families.
- The annual 4ALL Statewide Service Day, launched in 2008, now regularly answers almost 10,000 calls through the work of almost 500 attorney volunteers each year.

The COVID-19 pandemic has placed many people in our state in need of legal assistance, and the work and efforts of our programs and volunteers are as important and needed now as ever. Our pro bono efforts have adapted to a new environment that has little precedent in recent history. The Foundation has worked with legal services providers across the state to provide programming responsive to pandemic-related legal needs.

The NC Free Legal Answers program was able to respond immediately to the pandemic through the creation of a question category devoted to COVID-19. Individuals from nearly every county across the state have been served through this platform during the pandemic. Lawyers for Literacy volunteers created a library of video recordings of lawyers and paralegals reading civic education books accessible to parents and teachers. The Wills for Heroes program is shifting to a software platform that can be used remotely by volunteers to serve first responders. The COVID-19 Frontline Health Planning Project, a program partnership between the Foundation and NC Pro Bono Resource Center, enables the remote creation of advance health care directives for essential and frontline workers.

The Foundation coordinated with legal aid providers and bar organizations to host COVID-19 (Virtual) Legal Hotlines throughout North Carolina. Thousands of individuals have had COVID-19 related questions answered by hundreds of volunteers through these hotlines.



All this work was made possible thanks to your volunteer time and philanthropic support. We are grateful to you for your engagement and support, which we need as we continue our work to serve. The capacity of our profession and our organizations to step up, step in and make a difference during this time of need has been vital for the people of our state. Together, we will continue our important work to unite the talent and generosity of our profession to be a power of greater good for the people of North Carolina.

Thank you for being a member of the North Carolina Bar Association and for your support of the North Carolina Bar Foundation.

Sincerely,

A handwritten signature in black ink that reads "Jason M. Hensley". The signature is written in a cursive, flowing style.

**JASON M. HENSLEY**  
Executive Director  
North Carolina Bar Foundation

“All this work was made possible thanks to your volunteer time and philanthropic support. We are grateful to you for your engagement and support, and we need that engagement and support as we continue our work to serve.”

**JASON M. HENSLEY**  
Executive Director  
NCBF

# North Carolina Bar Foundation 2019-20 IMPACT REPORT

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NORTH CAROLINA  
BAR FOUNDATION

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[ncbarfoundation.org](http://ncbarfoundation.org) | 919.677.0561  
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## NCBF MISSION STATEMENT

Uniting the talent and generosity of our profession to be a power of greater good for the people of North Carolina.

## FOUNDATION PROGRAM PARTNERS

Generous support from our Foundation Program Partners, which include law firms and organizations from across North Carolina, helps to expand and deepen the impact of our Foundation's statewide pro bono and public service programs. Learn more about what motivates these organizations to partner with the Foundation on pages 8, 10 and 15.

# NCBF Programs Impact at a Glance

In total, **14,255** citizens were served by **1,235** volunteers across all NCBF programs in 2019-20.

## NCBF COVID-19 RESPONSE

### Virtual Legal Hotlines

**6** Hotlines (Charlotte x 2, Triad, Triangle, Western N.C. and Eastern N.C. regions)

**3,689** Calls answered

**330** Volunteers

### Frontline Health Planning Project

**28** Clients served

**73** Volunteers

## ACCESS TO JUSTICE

### NC Free Legal Answers

**1,424** Questions answered

**155** Volunteers

**95** Counties served this year

### 4ALL Statewide Service Day

**7** Sites statewide

**8,788** Calls answered

**422** Volunteers

## SERVICE THROUGH THE PROFESSION

### Wills for Heroes

**6** Clinics

**630** End-of-life documents executed

**210** First responder families served

**188** Volunteers

### NC Lawyers for Entrepreneurs Assistance Program (NC LEAP)

**43** Clients matched with attorney volunteers

**22** Volunteer attorneys serving clients

## CIVIC EDUCATION

### Lawyers for Literacy

**455** Students served

**91** Volunteers

### Middle School Mock Trial

**8** Schools

**4** N.C. Counties

**150** Students served

**32** Volunteers

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# NCBF Endowment Impact at a Glance

**\$14.3M** Endowment value as of June 30, 2020

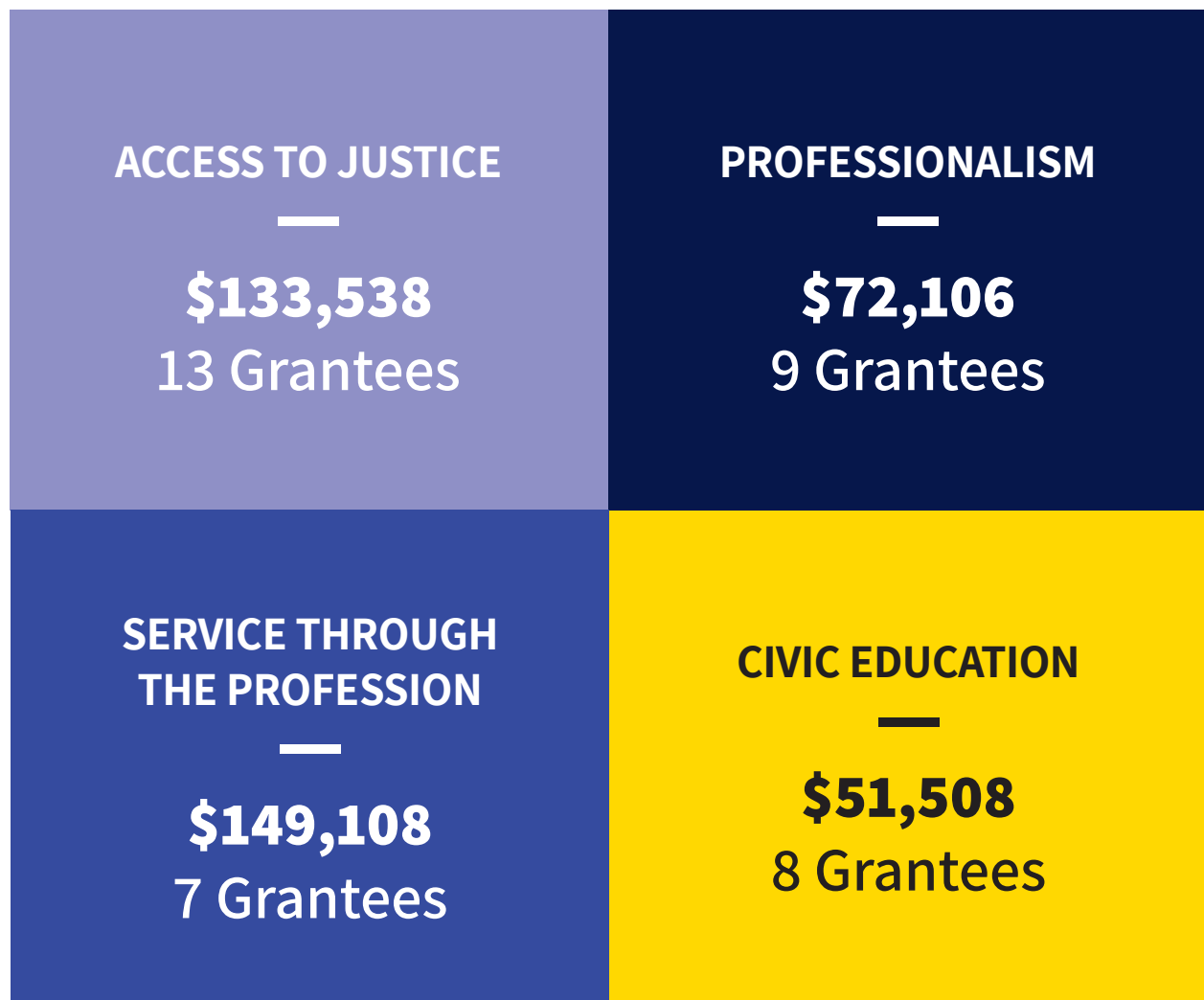
**\$406,260** Endowment grants distributed in 2019-20

**37** Endowment grantees in 2019-20

**31 Years** of NCBF Endowment grantmaking

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## Connecting Grants with NCBF Values



# Responding Through Pro Bono and Public Service Opportunities

NCBF COVID-19 RESPONSE  
BY THE NUMBERS

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**6** Virtual Legal Hotlines  
**3,689** Calls Answered  
**18** Videos Posted

On Friday, March 6, the North Carolina Bar Foundation celebrated the 13th annual 4ALL Statewide Service Day. Hundreds of volunteer attorneys assisted thousands of citizens from call centers across the state.

## Then the world changed.

Within a few weeks, the heightened ramifications of the COVID-19 pandemic brought an abrupt stoppage to in-person gatherings of all kinds, including the important work of the NCBF. Within a month, however, the Foundation shifted gears and found new ways for legal professionals to provide volunteer service to the public.

### Virtual Legal Hotlines

In the spirit of 4ALL but conducted entirely by remote service, COVID-19 Virtual Legal Hotlines were held throughout the state, serving thousands of citizens in Charlotte, Triad, Triangle, Eastern and Western regions of the state. Working remotely through an app downloaded onto a computer or mobile device, volunteers took calls and answered questions related to the effects of the COVID-19 pandemic, including housing, employment and benefits. All of the Hotlines have been conducted in partnership with Legal Aid of North Carolina, and the Western region COVID-19 Virtual Legal Hotline included additional partnership with Pisgah Legal Services and the Buncombe County Bar. 4ALL Statewide Service Day media partners WLOS (Asheville), WFMY (Greensboro), WBTV (Charlotte), WRAL (Raleigh), WNCT (Greenville) and WECT (Wilmington) also provided tremendous support to this endeavor.

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### NC Free Legal Answers

The web-based NC Free Legal Answers was perfectly situated to provide pro bono legal service when the ability of clients and attorneys to meet in person became limited by the COVID-19 pandemic. Through this remote-access program, low-income residents from every part of the state can post legal questions to be answered anonymously by volunteer attorneys 24 hours a day, 7 days a week, 365 days a year. As the impact of the coronavirus intensified, an increasing number of clients sought advice and information regarding housing, benefits, employment, consumer protection and family law matters.

---

### Frontline Health Planning Project

The NCBF and NC Pro Bono Resource Center launched the COVID-19 Frontline Health Planning Project to assist essential workers on the frontlines of the COVID-19 pandemic. Using an app that facilitates remote service, pro bono attorneys interviewed clients and prepared statutory health care powers of attorney and living wills.

---

### Eviction Assistance Project

The NCBF partnered with Legal Aid of North Carolina on an eviction assistance pro bono project to serve those facing eviction in the wake of COVID-19. Attorney volunteers have stepped forward to counsel clients who have been served with eviction notices. The NCBA Litigation Section and Minorities in the Profession Committee led the volunteer recruitment effort for this project.

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### Lawyers for Literacy Video Recordings

Lawyers for Literacy volunteers help elementary school students improve their reading skills and expand their understanding of U.S. history and civics. When in-school reading opportunities fell by the wayside in light of COVID-19, volunteers pivoted to provide elementary students and their families streaming online educational stories. A gallery of video recordings is now in place and readily available for students from the comfort and safety of their homes.

**“The COVID-19 pandemic has placed many people in our state in need of legal assistance, and the work and efforts of our programs and volunteers are as important and needed now as ever.”**

**JASON M. HENSLEY**, Executive Director, North Carolina Bar Foundation



**“As a firm, we believe in supporting the communities we serve in a variety of ways, including pro bono work. We like the fact that the NCBF supports pro bono work in these communities and across the entire state. We are pleased that our support of the Foundation enables that statewide reach.”**

#### FOUNDATION PROGRAM PARTNER SPOTLIGHT

## Hutchison PLLC

As a business and financial transactions law firm, it is often difficult for us to find pro bono projects that match our skills. But the North Carolina Lawyers for Entrepreneurs Assistance Program (NC LEAP) and the recent Virtual Legal Hotline during the COVID-19 crisis have provided great ways for our lawyers to participate in pro bono projects. These formal programs make it easy for them to participate.

As a firm, we believe in supporting the communities we serve in a variety of ways, including pro bono work. We like the fact that the NCBF supports pro bono work in these communities and across the entire state. We are pleased that our support of the Foundation enables that statewide reach.

Our lawyers benefit from these programs too. It shows them one of the ways in which some of our firm’s core values — respect and compassion — can be applied beyond just our clients and colleagues.

**FRED HUTCHISON**, Hutchison PLLC



# A Commitment to Access to Justice

Access to justice is woven throughout the work of the Foundation, from its signature programs to the programs of community partners receiving grants from the NCBF Endowment.

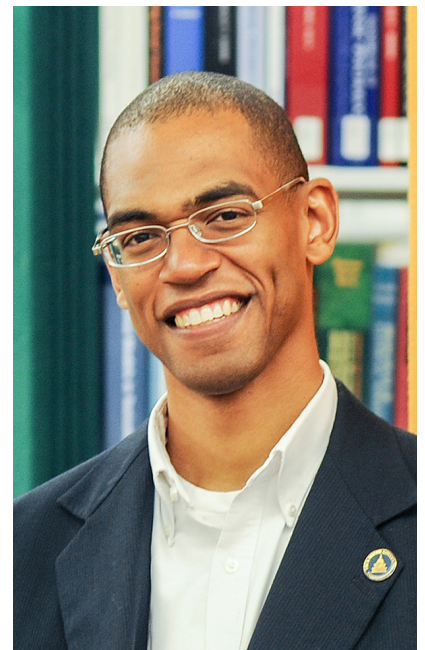
Enhancing access to justice is a guiding principle of NC Free Legal Answers, the Foundation's web-based pro bono program that expands public access to legal advice and information about non-criminal matters for low-income people. Financially eligible individuals submit civil legal questions to an online portal for volunteer attorneys to answer free of charge. North Carolina became a participant in ABA Free Legal Answers in 2017, and NC Free Legal Answers has since served residents in all 100 North Carolina counties.

NC Free Legal Answers has proven an especially valuable pro bono resource in the wake of the COVID-19 pandemic. The number of questions being submitted to the NC Free Legal Answers portal has increased significantly, and volunteer attorneys have readily responded to North Carolinians across the state.

**“NC Free Legal Answers is a critical lifeline for low-income North Carolinians, especially during the twin crises of economic and pandemic recovery.**

**“Our legal expertise, provided on this site, helps pro se litigants and other unrepresented persons navigate thorny legal challenges with an effectiveness not likely or possible without this pro bono service.”**

**BRANDON A. ROBINSON**, Durham attorney and  
NCBA + NCBF board member



**NCBF VISION: A vibrant North Carolina where legal services are available to all, regardless of ability to pay; where members of the legal profession provide community service and leadership that profoundly impacts the public, thereby demonstrating the value of our profession to society; and where all North Carolinians understand and have confidence in a legal system that serves them.**



**“Our firm has long had a sense of place and a commitment to serve the broader North Carolina community, and the North Carolina Bar Foundation’s pro bono and public service projects provide so many different opportunities for our lawyers to plug in and start working right away.”**

#### FOUNDATION PROGRAM PARTNER SPOTLIGHT

## Smith Anderson

Now more than ever, North Carolinians understand the importance of community, and we have seen the needs within those communities laid bare. It’s critical, both on a professional and a personal level, that the legal profession unite to serve our communities and meet the immense problem of unmet legal needs and all of the associated impacts of those unmet legal needs.

Our firm has long had a sense of place and a commitment to serve the broader North Carolina community, and the NCBF’s pro bono and public service projects provide so many different opportunities for our lawyers to plug in and start working right away. Whether working alongside colleagues during the 4ALL Statewide Service Day or at a Wills for Heroes event, reading to a classroom of children through the Lawyers for Literacy program, or at home answering questions through NC Free Legal Answers, our lawyers have found so many fulfilling ways to serve our neighbors, and together, we’ve seen how these acts of service can empower others, increase access to justice and chip away at the big problems our society is facing.

**JAMES JOLLEY, Smith Anderson**

# For the 2019-20 bar year, 33 percent of NCBF Endowment grants were awarded to organizations in support of programs that advance access to justice.

## InterAct Family Safety and Empowerment Center

The grant to the InterAct Family Safety and Empowerment Center in Raleigh helps provide critical funding for the E-Filing and Court Navigator programs. Jessica Smith, a domestic violence survivor, shared: “E-Filing at InterAct provides a safe space for victims to continue to build the foundation of strength, confidence, and support they’ll need as they navigate the process of leaving an abusive relationship. The positive effects of E-Filing are immeasurable.”

## Council for Children’s Rights

The grant to the Council for Children’s Rights in Charlotte supports the organization’s commitment to represent every child facing civil commitment to a psychiatric hospital or residential treatment facility in Mecklenburg County. “As a board member for Council for Children’s Rights, I’ve seen firsthand the impact of NCBF community grants,” shared Cabell Clay, immediate past chair of the NCBA Young Lawyers Division and past president of the Council for Children’s Rights Board of Director. “The NCBF grant supports the Council for Children’s Rights in serving as mental health lifelines for their child-clients, monitoring the state of their mental health, connecting them to critical services, and making sure their rights are protected.”

## Lawyer on the Line, Legal Aid of North Carolina

Legal Aid of North Carolina (LANC) is supported by an Endowment grant that is used to administer the popular Lawyer on the Line pro bono volunteer program. Through Lawyer on the Line, attorney volunteers provide phone-based limited representation to legal aid clients on a range of issues including eviction, consumer protection and government benefits. Over the last nine years, the Lawyer on the Line program has allowed LANC to serve almost 28,000 more people who otherwise would not have had access to justice, with over 35,000 hours of pro bono service contributed through Lawyer on the Line by lawyers, paralegals and law students across the state.

## Court Watch of North Carolina

Court Watch of North Carolina is a self-help program in Guilford County that provides court-approved forms and instructions to pro se litigants in family law custody and visitation cases. A grant from the Endowment supports service to about 40 clients a month through referral from local court staff, the Guilford County Department of Social Services, Legal Aid, local attorneys and organizations that serve families.

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# Professionalism at the Forefront

A commitment to professionalism is a unifying power within the legal profession, which helps explain why the NCBF named professionalism as one of its four guiding values.

**We embrace the professional obligations of lawyers to make a difference. We are committed to actively cultivating a culture of service, training lawyer leaders and utilizing innovative approaches to bring North Carolina lawyers together to work alongside one another for the greater good.**

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## NCBA Leadership Academy



The NCBF provides annual grant support to the NCBA Leadership Academy. The mission of the Leadership Academy is to help younger lawyers become effective leaders in their communities and workplaces. Leadership Academy provides resources and training to support leadership development and public service.

**“It is inspiring and rewarding to be involved with a group of lawyers in the early years of their careers, from all across North Carolina, coming together to work on developing themselves to be the future leaders in our profession. This program exemplifies the NCBF’s commitment to professionalism.”**

**JON HEYL, 2020-21 NCBA + NCBF President-Elect**

## Minorities in the Profession Committee

The NCBA Minorities in the Profession Committee (MIP) is dedicated to promoting an increased presence of minorities in the legal profession; the ongoing education of minorities in the legal profession; the betterment of life for those minorities in the legal profession; providing the public with quality information regarding issues of concern to minority lawyers; and educating the public about the contributions of North Carolina's minority lawyers. The NCBF provides grant support to the MIP Committee and its Diversity and Inclusion Symposium.

**“Professionalism can be developed from a multitude of sources — both formal through education or scholarly articles and informal through culture and environment. Creating a diverse culture and environment that includes all attorneys, judges, and legal professionals in all levels of leadership and influence in our profession helps advance professionalism for all NCBA members. This year, a year full of tremendous change and unprecedented dialogue on racial equity, demonstrates there is no better time than the present for the NCBA and NCBF to address these issues.”**

**TAWANDA FOSTER ARTIS**, NCBA board member,  
former MIP Committee co-chair



## Professional Vitality Committee

The NCBA Professional Vitality Committee focuses on the well-being of legal professionals from the beginning of their careers to winding down to retirement. The committee's work addresses both the stresses of the profession and the joys of life experiences while lawyering. The NCBF Endowment awarded a grant in support of the committee's efforts to craft and curate resources that educate and raise awareness about skills that positively affect human behavior and enhance enjoyment in being a legal professional.

“The Foundation's support equips the Professional Vitality Commission to fulfill its mission. Our committee provides a unique compendium of resources for legal professionals throughout North Carolina, with the aim of promoting thoughtful discussion about practices which enhance well-being, vitality, satisfaction, and joy in the lives of members of our profession,” said Erna Womble, chair of the NCBA Professional Vitality Committee.



# Advancing Civic Education

The NCBF values civic education and supports the role of legal professionals as educators by facilitating opportunities for meaningful interactions between students and attorneys and judges who are willing to share their perspectives, advice, stories and experiences. Fostering this type of volunteer engagement increases knowledge and understanding of the rule of law, the role of judges in our society, U.S. history and civics, and the Constitution.

**Lawyers for Literacy** matches legal professionals with local school children to improve students' reading skills and spark their interest in books, civics and history.

**The McIntyre Youth Leadership Challenge** encourages middle school and high school students to develop the skills required to help solve problems in their local communities through research, public speaking and community action.

**Middle School Mock Trial** provides resources for teachers, parents and volunteers to conduct mock trial and civic engagement experiences for middle school students.

**Lawyers as Guest Speakers** facilitates opportunities for meaningful interaction between high school students and attorneys and judges who are willing to share their stories, perspectives and insights.

**Career Fairs** at middle schools and high schools provide volunteer opportunities for attorneys to share with students the value of the legal profession and provide educational materials at designated events within the schools.

**In 2019-20, \$51,508 was awarded to Endowment grantees in support of civic education programs.**

**The NCBF embraces our role as educators and is enthusiastic about helping our fellow North Carolinians – both schoolchildren and adults – understand and have confidence in the rule of law and our justice system.**



**“Robinson Bradshaw’s partnership with the NCBF allows us to leverage our commitment with the philanthropy of the profession and programs supporting access to justice, education about the legal system, and other trusted legal service programs across our state.”**

#### FOUNDATION PROGRAM PARTNER SPOTLIGHT

## Robinson Bradshaw & Hinson

As lawyers, we’re uniquely positioned to be a force of good for North Carolina and its residents for many reasons. Among them are our obligation as members of the bar and the opportunities that flow from that membership. The Preamble to our Rules of Professional Conduct obligates each of us to seek improvement of the law and access to the legal system. We’re duty bound to work for the continuous improvement of our legal system and to increase access for all our residents to it. But, maybe more important, as my law partner and friend John Wester, a former NCBA President, often says, many disadvantaged North Carolinians “need help that only lawyers can provide.” At a time when confidence that our justice system serves all North Carolinians equitably regardless of race or economic circumstances is so important, lawyers have a golden opportunity to lead.

Robinson Bradshaw’s partnership with the NCBF allows us to leverage our commitment with the philanthropy of the profession and programs supporting access to justice, education about the legal system, and other trusted legal service programs across our state. As a firm, Robinson Bradshaw is committed to serving North Carolinians, and supporting NCBF and its programs is a key part of that commitment.

**ROB HARRINGTON, Robinson Bradshaw & Hinson PA**

# The NCBF engages lawyers in schools and provides Endowment grants to programs that advance civic education and community engagement.

## YLD Civic Engagement Project

The YLD Civic Engagement Project encourages young lawyers to engage with their communities through civic activity. Led by Co-chairs Bryan Norris and Kevin Sweat, the project featured webcast panel discussions on topics including “Paths to the Judiciary,” moderated by NCBA + NCBF Past President Caryn Coppedge McNeill, and “From Lawyer to Legislator,” moderated by former U.S. Attorney Anne Tompkins of Cadwalader, Wickersham & Taft. “Thanks to the steadfast support of the Foundation we were able to adapt our programming in the face of COVID-19 and continue encouraging fellow lawyers to pursue positions of community leadership,” Norris shared.

## Law Week

Law Week is an annual series of events and programs organized by the NCBA Young Lawyers Division. While the Law Day recognition event in early May was cancelled this year due to COVID-19, Law Week programs continued, including a poster contest for grades 3-5, an essay contest for grades 6-8 and 9-12, and the public policy advocacy competition McIntyre Youth Leadership Challenge, which is supported by the Douglas Carmichael McIntyre II Justice Fund.



**“Thanks to the NCBF Endowment grant funding, the YLD is able to provide Law Week programs that encourage students to become engaged members of their communities and better understand the role of the law and the legal profession in our society.”**

**KRISTEN KIRBY, 2020-21 YLD Chair**

## Judicial Independence and Integrity

The NCBA Judicial Independence and Integrity Committee, chaired by former Associate Justice Robert Edmunds, partners with the Foundation’s Lawyers In Schools programming to engage lawyers and judges as classroom speakers.

“The Judicial Independence and Integrity Committee is made up of some of North Carolina’s most experienced lawyers and judges, who have seen the crying need for effective civics education,” Edmunds said. “In response, committee members have generously volunteered their time to travel to schools across the state, speaking to students, sharing their stories, and explaining both the privileges and duties of citizenship to the next generation.”

## Restorative Justice

The Dispute Settlement Center in Carrboro is an NCBF Endowment grantee that administers restorative justice programs for youth that focus on building community, strengthening relationships, and responding to and repairing harm. Through mediation, education and conflict resolution, the Center’s programs create accountability and meaningful connections within the justice system.



# Service Through the Profession

**Advancing service through the profession helps ensure that legal services are available to all, regardless of ability to pay, demonstrating the value of the legal profession to society while increasing confidence in a legal system that serves all.**

## North Carolina Lawyers for Entrepreneurs Assistance Program (NC LEAP)

Established in 2007 as a project of the NCBA Business Law and Corporate Counsel Sections, NC LEAP was built upon the belief that entrepreneurship is essential to North Carolina's economic future. When NC LEAP was started, traditional businesses were declining as the state grew, and in spite of this growth, rural areas continued to have high concentrations of poverty.

Fulfilling its promise tenfold, NC LEAP has assisted more than 3,000 small business owners across the state through education and pro bono legal representation. And, thanks to generous private support, NC LEAP will continue to grow and evolve through limited representation clinics Clinics for small business owners in collaboration with statewide partners like Mountain BizWorks in Asheville and Prospera in Charlotte.

The NCBF also administers a patent pro bono program that was developed in 2014 in partnership between NC LEAP and the U.S. Patent & Trademark Office.

## Wills For Heroes

Adopted as a project of the NCBA Young Lawyers Division in 2007, Wills for Heroes provides life planning documents for first responders and their families.

Following the tragic events of 9/11, which claimed the lives of hundreds of first responders, attorneys Anthony Hayes of South Carolina and Jeff Jacobson of Arizona sprang into action and established the Wills for Heroes Foundation, and bar organizations across the country were invited to adopt the program. The NCBA YLD answered the call, and the NCBF now administers the enormously successful program.

Amidst yet another crisis — the COVID-19 pandemic — Wills for Heroes has been restructured to accommodate the uncertain times in which we live. Utilizing new app technologies and video conferencing options, Wills for Heroes will continue to draft and execute wills, health care power of attorney and durable power of attorney documents for first responders. Thanks to our generous donors, the North Carolina Bar Foundation continues to provide legal services to individuals who risk their lives every day serving the citizens of North Carolina.

# The North Carolina Bar Foundation is committed to mobilizing the expertise and experience of legal professionals to be of service through pro bono and public service programs that strengthen and improve communities statewide.

## Adopt-A-Base

The North Carolina Bar Foundation is proud to partner with NCBA Sections in support of their pro bono projects. For the 2019-20 bar year, the Tax Section received grant funding for its signature pro bono program, Adopt-A-Base. This program allows volunteer attorneys to train tax preparers via the Military Volunteer Income Tax Assistance Program (VITA), a free tax service available to the military.

The Tax Section has served tens of thousands of service members across North Carolina. Attorney volunteers have found it exceptionally rewarding because it is a way to serve the troops who serve our country daily. This bar year, in Fort Bragg alone, Military VITA filed 19,663 returns, saved military families more than \$5 million in tax preparation fees, and helped them receive \$28.4 million in refunds.

“The Adopt A Base program is a vital pro bono service that the Tax Section is able to provide to our men and women in uniform in conjunction with and working with the IRS,” said Rob Wall, chair of the Tax Section. “The grant from the NCBF has allowed the Tax Section to expand the reach of this program so that members of the Tax Section can better equip and better assist the members of our military maintain compliance with their tax obligations while continuing to serve our country.

“We are grateful for their service and thanks to the NCBF, the members of the Tax Section are able to give something back to them as well. Thank you for all that you do for the citizens of our state and our country.”

## Mountain Area Volunteer Lawyer Program

The NCBF was proud to award a grant to Pisgah Legal Services in support of the Mountain Area Volunteer Lawyer Program, a partnership between Pisgah Legal Services and attorneys across western North Carolina. This program provides the platform for volunteers to provide advice, brief consultation and representation/extended services to Pisgah Legal Services clients addressing the following legal needs: Family Law related to domestic violence, sexual assault and child abuse; Landlord/Tenant Law; Bankruptcy; Consumer Law & Debtor’s Right; Wills and Advanced Directives; Disability, Supplemental Security Income, and Medicaid; Guardianship; Tax Law; Unemployment Law; Other Employment Matters; Expunction of Criminal Records; Immigration Remedies and Powers of Attorney for Immigrant Clients.

This past year, the Mountain Area Volunteer Lawyer Program mobilized 269 attorneys to offer pro bono services to meet legal needs for individuals throughout Western North Carolina. Jim Barrett, executive director of Pisgah Legal Services and recipient of the 2020 Deborah Greenblatt Outstanding Legal Services Attorney Award, believes that the partnership with the North Carolina Bar Foundation is crucial to their work.

“The Foundation,” Barrett said, “is a critical partner in Pisgah Legal Services work to recruit, train and support volunteer attorneys to stand up for justice for thousands of our neighbors across western North Carolina each year.”



## DONOR SPOTLIGHT

# James F. “Jim” Morgan Lawyer Impact Fund for Public Service

## LAWYER IMPACT FUNDS

**Lawyer Impact Funds are namesake funds held in the North Carolina Bar Foundation Endowment. Through annual grants, they advance the Foundation’s values of access to justice, professionalism, service through the profession and civic education. Adopted by the NCBF in 2018, these namesake funds can be created with a commitment of \$25,000.**

In the 2019-20 bar year, the NCBF announced the first Lawyer Impact Fund, created by James F. “Jim” Morgan of Morgan, Herring, Morgan, Green & Rosenblutt in High Point.

Jim is certainly no stranger to the Foundation. In 2015, he established two Justice Funds: the James F. Morgan Justice Fund, and the one of which he is most proud, the James V. Morgan Justice Fund in honor of his father and former law partner. Lake View Plaza Pavers were also dedicated in honor of J.V. and Jim Morgan and their granddaughter and daughter, Monroe attorney Lea E. Morgan.

Jim wanted this newly created fund to help advance the Foundation’s value of service through the profession. He shared that his father taught him that it is incumbent upon lawyers to provide public service, and Jim took the message to heart by serving in the state legislature and by leading more than 75 organizations. Jim believes it is his public service work that opened so many leadership opportunities to him.

Jim and Ann Morgan’s continued commitment to the NCBF through the James F. Morgan Lawyer Impact Fund will support service through the profession in perpetuity.

# 2019-20 Honor Roll of Donors

## MESSAGE FROM NCBA + NCBF PRESIDENT MARK HOLT



As a community of legal professionals, our highest calling is to serve others. We do this in many important ways. One of the best ways I know is through support of the North Carolina Bar Foundation, whose mission challenges our profession to be a power of greater good. We are pleased to publish this 2019-2020 Honor Roll of Donors to recognize and thank those whose support helps our Foundation carry out this mission every day. The steadfast and generous philanthropic support of these donors makes the pro bono and public service programs of the NCBF possible.

On behalf of the North Carolina Bar Foundation and those we serve across our state, THANK YOU! With your support, we will continue to unite the talent and generosity of the legal profession to be a power of greater good for the people of North Carolina.

### C. MARK HOLT, 2020-21 NCBA + NCBF President

#### JUSTICE FOR ALL SOCIETY (\$25,000 AND ABOVE)

Kelly Kathleen Daughtry  
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