



2022 IMPACT REPORT

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

FROM THE EXECUTIVE DIRECTOR >



The mission of the North Carolina Bar Foundation is to unite the talent and generosity of our profession to be a power of greater good for the people of North Carolina.

The Foundation's vision is 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.

To further the Foundation's mission and vision, we uphold the values of justice, service, education and professionalism.

The Foundation Task Force on Recognition and Grant Initiatives was created following the 2021 Report Regarding Relationships between the NCBA and Systemic Racism in North Carolina. The Task Force was asked to review and make recommendations regarding the diversity and inclusion of individuals recognized by Foundation Justice Funds (the development of new Justice Funds was halted during the review); and to consider and make recommendations to the Foundation Board regarding appropriate

grant and program initiatives to encourage greater equity, diversity and inclusion in the practice of law and delivery of legal services in North Carolina.

The Task Force met eight times during the 2021-22 bar year, in addition to breakout meetings with various NCBA groups. As a result of its work, the Task Force made multiple recommendations to the Foundation Board regarding the Justice Fund program and related events, the description of the Justice Fund program and Fund recognition, the development of a Diversity, Equity and Inclusion Fund and other steps to lay the groundwork for additional work, efforts and initiatives.

At the conclusion of the final meeting of the Task Force, a recommendation was made to adopt the following additional value (which was adopted by the Foundation Board of Directors unanimously on June 23, 2022): We value diversity, equity and inclusion. We acknowledge and are committed to addressing inequities in access to legal services and participation in the legal profession experienced by historically excluded or disadvantaged individuals and communities in North Carolina.

This value is discussed further in this Report and its addition serves to complete the mission, vision and values of the Foundation. A great deal of thanks is owed to the Task Force for their good work, as well as all those who have labored to remove barriers and address inequity.

As always, we offer our sincere and humble thanks to everyone who has given time, energy, resources and care to our many funds and programs. Significant access to justice needs exist in our state and we thank you for your help in meeting those needs, easing the pain of others and, in many cases, improving the future.

Sincerely,

A handwritten signature in black ink that reads "Jason M. Hensley". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Jason M. Hensley
Executive Director, North Carolina Bar Foundation



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Volunteer Spotlights are featured on pages 6, 8, 11, 14, 17 and 22.

Foundation Program Partners are featured on pages 9, 12, 16, 19 and 23.

IMPACT AT A GLANCE >

11,678 individuals were served through NCBF pro bono and civic education programs in 2021-22.

4ALL

- 7,387 callers served
- 373 volunteers

CAREER FAIRS

- 2 law student information sessions
- 1 middle school career fair
- 90 students served
- 11 volunteers

FREE LEGAL ANSWERS

- 1,600 questions answered
- 97 counties served
- 554 volunteers

HOUSING STABILITY PROJECT

- 774 referrals made
- 115 volunteers

LAWYERS AS GUEST SPEAKERS

- 21 classrooms served
- 16 volunteers



NCBF Past President Mark Holt shares what NCBF programs mean to him.

LAWYERS FOR LITERACY

- 22 videos created
- 684 views
- 20 volunteers

MCINTYRE YOUTH LEADERSHIP CHALLENGE

- 48 students served
- 15 volunteers

MIDDLE SCHOOL MOCK TRIAL

- 70 students served
- 15 volunteers

NC LEAP

- 8 webinars held
- 711 views



PRO SE CUSTODY CLINIC

- 10 clients served
- 26 volunteers, organized by the NCBA Paralegal Division and Family Law Section

PATENT PRO BONO PROGRAM

- 11 client cases closed
- 10 ongoing cases
- 21 volunteers

WILLS FOR HEROES

- 12 clinics
- 742 documents prepared
- 262 first responders served
- 82 volunteers

The NCBF distributed **\$520,429** in Endowment Funds in 2021-22.

NCBF Endowment funds are distributed to statewide programs and organizations that advance NCBF values: access to justice, service through the profession, civic education, professionalism and diversity, equity and inclusion.

THE NCBF ENDOWMENT: SERVING THE COMMUNITY >

Since its formation in 1987, the NCBF Endowment has provided more than **\$6 million** in grant funding.

The North Carolina Bar Foundation is the home of the NCBF Endowment. Since its formation in 1987, the NCBF Endowment has provided more than \$6 million in grant funding to high-impact statewide programs and organizations committed to advancing the NCBF's values of access to justice, service through the profession, civic education, professionalism and diversity, equity and inclusion. These grants are funded from the interest earned from the NCBF Endowment, valued at \$14.8 million (as of June 2022).

The NCBF Endowment exists thanks to the generous philanthropic support of NCBA members and friends.

Because grant awards are distributed based on the Endowment's interest earned, the corpus of the NCBF Endowment continues to grow through prudent investments with the oversight of the NCBA Investment Committee.

“The need for legal services has skyrocketed for regular, hardworking friends and neighbors across North Carolina. As legal professionals, we must assure the Foundation has the resources to continue answering the call for legal services.” – Woody Connette

Why is this important?

The NCBF Endowment will award annual grants in perpetuity to organizations committed to serving the people of North Carolina as only the legal profession can. This should be a point of pride for the legal profession.

How are grants awarded?

The NCBF Endowment Committee, comprised of NCBA members and chaired by Edward Griggs of Winston-Salem, oversees a competitive grant application process. After extensive review of the grant applications, the NCBF Endowment Committee makes recommendations for grant awards for approval by the NCBF Board of Directors.

“Participating in the grant review and recommendation process as a member of the Endowment Committee has been

NAMED ENDOWMENT FUNDS

- **Justice Funds** are established with a minimum of \$50,000 in commitments intended to bolster the NCBF Endowment.
- **Lawyer Impact Funds** are established with a minimum gift of \$25,000 restricted to programs that promote NCBF values.
- **Liberty Funds** are established with a minimum unrestricted gift of \$10,000 to the NCBF Endowment.

THE NCBF RECOGNIZES AND THANKS THOSE NAMED ENDOWMENT FUNDS DEDICATED IN 2021-22:

The Anonymous Justice Fund
Robert C. Cone Justice Fund
Joseph B. Cheshire V Justice Fund

N. Leo Daughtry Justice Fund
George B. Mast Justice Fund
Russell M. Robinson II Lawyer Impact Fund

VOLUNTEER SPOTLIGHT



Afi
Johnson-Parris
Johnson-Parris Law

I've come to realize there are a few things that I need to be happy in my career. I need to be around other lawyers and I need to use my legal knowledge to serve. My volunteer experience with the NCBA and NCBF fills those needs. I enjoy the camaraderie of working on projects with colleagues from different locales and practice areas. I've met so many caring lawyers that it puts negative stereotypes of lawyers to shame. The 4ALL Statewide Service Day is my favorite day to be a lawyer. As I answer questions from the public, I'm often reminded that my legal knowledge, even when used for the simplest question, can do a world of good for people with family law needs.

one of the most rewarding engagements in which I have been involved," shared Edward Griggs, NCBF Board of Directors member and Chair of the NCBF Endowment Committee. "The Endowment Committee takes very seriously its job of reviewing and evaluating grant applications, giving careful attention to assessing which programs will steward the Foundation's resources most effectively. It is a joy to see the purposeful work that so many organizations are pursuing, as well as an honor to be entrusted with the resources that donors to the North Carolina Bar Foundation have generously provided."

How can we meet more of the need?

The NCBF Endowment is bolstered through the creation of named endowment funds and deferred gift commitments, frequently referred to as planned gifts. These gift commitments are a wonderful way for NCBA members to members secure their legacies, demonstrate their commitment to addressing statewide legal needs and honor their colleagues.

"The need for legal services has skyrocketed for regular, hardworking friends and neighbors across North Carolina. As legal professionals, we must assure the Foundation has the resources to continue answering the call for legal services," stated Woody Connette, NCBF Board of Directors member and chair of the NCBF Development Committee.

"Creating a named NCBF Endowment fund is a thoughtful way to pay it forward while creating a namesake legacy commitment to advance access to justice, pro bono service, civic education, professionalism and diversity, equity and inclusion."

WILLS FOR HEROES EXPANDS ITS IMPACT >

In 2021-22, **262** first responders and their families were served by **82** volunteers through Wills for Heroes.



First responders reviewing end of life documents created by NCBF attorney volunteers.

The North Carolina Bar Association's spirit of volunteerism, combined with the North Carolina Bar Foundation's ability to adapt to changes and challenges brought about by the COVID-19 pandemic, resulted in a remarkable year for Wills for Heroes in 2021-22. Twelve clinics were held across the state, through which 262 first responders and their families were served by 82 volunteers, resulting in the preparation of 742 simple wills, health care power of attorney and financial power of attorney documents – for free.

“This year, I saw firsthand the impact that the Wills for Heroes program has on the communities we serve,” said NCBF Director of Programs Alex Rogers. “Meeting with first responders from across the state, I heard so many individual stories about how much this program meant to their families and the relief they felt through completing these documents and putting a plan in place.”

Ken Klos-Weller, Wellness Sergeant for the City of Raleigh Police Department, concurs. “The Wills for Heroes program provides so much more than free legal assistance in drafting wills and power of attorney documents for the employees of the Raleigh Police Department,” he said.

“The first responder families who participate experience an emotional and mental lift from knowing that their financial and health care decisions will be taken care of in the event of a crisis, and this, in turn, reduces the amount of daily anxiety and stress levels we all face. We can't thank you enough for helping improve the overall wellness of not only our employees but their families as well.”

Technology played a vital role by enabling the NCBF to serve more rural areas through the use of the new Wills for Heroes application.



Wills for Heroes clinic hosted by Duke University School of Law.

“Using the app allowed volunteer attorneys to serve any community from Asheville to Goldsboro from their home or office,” Rogers said. “Through the NCBF’s network across the state, we were able to identify volunteer notaries and witnesses to assist with executing documents. We also harnessed the expertise of our Foundation Program Partners to expand our group of lead volunteers to assist with clinics and document review. Expanding this group gave us the support we needed to offer multiple clinics per month. I am beyond grateful for the time and dedication our volunteers have poured into this program this year.”

“The Wills for Heroes program provides so much more than free legal assistance in drafting wills and power of attorney documents.” – Ken Klos-Weller

Support was also provided in a very big way by Lawyers Mutual, which sponsors the Wills for Heroes program.

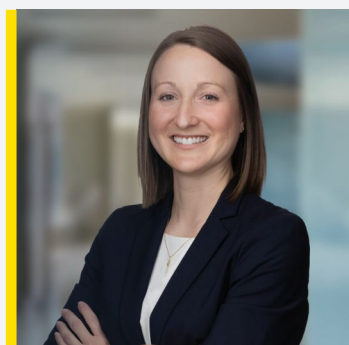
“Lawyers Mutual is proud to support the NCBF Wills for Heroes program serving first responders across North Carolina,” said Director of Client Services Julie Beavers.

“Through the NCBF, we are able to mobilize NCBA members, many of whom are our insureds, to serve North Carolina hometown heroes which directly aligns with Lawyers Mutual’s commitment to serve the community. We are thrilled our support allows the NCBF to expand the impact of Wills for Heroes, bringing a sense of relief to those first responders who risk their lives every day in service to all North Carolinians.”

Stay tuned, Rogers added, for continued expansion of Wills for Heroes in 2022-23.

“We plan to continue the momentum and expand our document offerings to include a fourth document, an advance directive.”

VOLUNTEER SPOTLIGHT



Elizabeth
Weisner
Moore & Van Allen

I volunteer through the NCBF Wills for Heroes program, which partners attorney volunteers with first responders to complete wills and healthcare and financial powers of attorney, because it gives me a way to say thank you to the people first on the scene in my community and across North Carolina who encounter risks every day while doing their jobs. The Wills for Heroes program is so important because it provides support and an element of peace of mind to those serving their communities every day.

DIVERSITY, EQUITY AND INCLUSION VALUE ADOPTED >

The North Carolina Bar Foundation values diversity, equity and inclusion.

The NCBF Task Force on Recognition and Grant Recommendations was formed following the completion of the Report on Relationships Between the NCBA and Systemic Racism in 2020. Its charge included making recommendations “regarding appropriate grant and program initiatives to encourage greater equity, diversity and inclusion in the practice of law and delivery of legal services in North Carolina.”

“Our values say who we are and guide us in what we do.” – Jon Heyl

Tammy Stringer chaired the Task Force, whose members also included Jonathan Bogues, Stuart Dorsett, Arnita Dula, Phyllis Pickett, Dick Thigpen and Matt Wolfe. At the final meeting of the Task Force on Recognition and Grant Recommendations, its members discussed the addition of a diversity-focused value that has since been adopted by the NCBF Board of Directors and incorporated into the Foundation’s mission, vision and values statement.

“Our values say who we are and guide us in what we do,” said Jon Heyl, who served as NCBA and NCBF President in 2021-22. “We have truly lived by, and designed our programs around, the values we say we embrace as a Foundation. We are grateful to the Foundation’s Task Force for so effectively articulating the [DEI] value, the addition of which will ensure we keep awareness and consideration of these important issues at the forefront.”

“In living up to its creed to espouse the values of justice, professionalism and giving back to the community through service and civic education, the NCBF recognizes that without the presence of persons from diverse and inclusive backgrounds, those ideals cannot be realized in their comprehensive fullness,” said Clayton Morgan, who is serving as NCBA and NCBF President in 2022-23. “Therefore, through the work of the recent Task Force, the NCBF has now decisively expressed the intrinsic value of including DEI amongst these vital core values – an addition which safeguards a sustained focus and mindfulness for us all.”



FOUNDATION PROGRAM PARTNER: Benton Family Law

“The Foundation helps to fund programs that provide valuable services to the citizens of North Carolina and opportunities for lawyers to serve their community. From our children through Lawyers for Literacy, to our first responders through Wills for Heroes, to helping low wealth entrepreneurs set up their companies with NC LEAP, to our statewide 4ALL day where we help all callers. There are so many other statewide programs that the Foundation has supported with grants and with volunteers. These programs allow me, my staff and other members of the profession to engage – even from a rural community in eastern North Carolina.”

– Shelby Duffy Benton, Proprietor

The complete NCBF Values Statement now reads as follows:

We value access to justice.

We believe access is an intrinsic part of justice and are committed to ensuring equal access for all by giving generously to, and using our civic influence on behalf of, organizations that provide pro bono legal services.

We value service.

We are passionate about opportunities to use our education and experience to be of service to our fellow North Carolinians, and we are proud of our flagship pro bono and public service projects that allow volunteer lawyers, paralegals and law students to strengthen and improve their communities all across our state.

We value education.

We embrace our role as educators and are enthusiastic about helping our fellow North Carolinians – both schoolchildren and adults – understand and have confidence in the rule of law and our justice system.

We value professionalism.

We take to heart our professional obligations as lawyers to make a difference. We actively cultivate a culture of service, invest in training lawyer leaders and use innovative approaches to bring North Carolina lawyers together to work alongside one another for the common good.

We value diversity, equity and inclusion.

We acknowledge and are committed to addressing inequities in access to legal services and participation in the legal profession experienced by historically excluded or disadvantaged individuals and communities in North Carolina.

THE INTERSECTION OF NCBF VALUES THROUGH PROGRAMS >

The five pillars of the NCBF Values Statement are imperceptibly woven into the fabric of NCBF pro bono and civic education programs.

But it is these values of access to justice, service, education, professionalism, and diversity, equity and inclusion that bind the programs of the NCBF with the highest ideals of the North Carolina Bar Association.

Samantha Gordon of Shane Smith Law in Charlotte, this year's recipient of the Younger Lawyer Pro Bono Service Award, made this connection before she even became a lawyer.

"When I was in law school, Wills for Heroes was presented to me through another law student in 2016," Gordon said. "After attending my first clinic, I continued to volunteer as a law student and eventually as a lawyer. And in 2018, I became a Lead Attorney Volunteer."

The values of access to justice and service figured prominently into the Foundation's response to COVID-19, wherein the need for programs such as Wills for Heroes was never more evident.

"In 2020, once the pandemic hit, we were faced with the obstacle of how to hold these clinics, which had always been done in person," Gordon said. "In the face of this obstacle, we developed a semi-virtual Wills for Heroes program that is even better. Not only has this provided a bigger outreach to first responders, but it has also provided an easier way for attorneys to volunteer."

City Attorney Kimberly Rehberg of Durham became involved in the NCBF Lawyers in Schools initiative through her service on the NCBA Judicial Independence & Integrity Committee, where civic education has long been a focal point.

"When I walk in the classroom," Rehberg said, "they are told that I am an attorney. While most have not personally known lawyers, they've watched TV and movies where they've seen lawyers portrayed. They have basic ideas about what it is that I do for a living. And, while I'm not a criminal attorney, which is what they've been exposed to most often, they have a pretty

VOLUNTEER SPOTLIGHT



Jonathan
Bogues
Michael Best &
Friedrich LLP

Over the years, I have continually volunteered and supported several NCBF initiatives. As a native North Carolinian, it is of utmost importance to me to support these causes, because it allows me to give back and provide valuable service, as well as stay connected to the community that has helped shape me. The NCBF provides ample opportunities to give back through its multitude of volunteer programming. At the end of the day, I strongly feel that our legacies will be measured by more than how many hours we can bill, cases we have won, or our book of business; our legacies will also be measured by the lives that we touch and impact in a positive way. The NCBF and its programs allow attorneys to do exactly that, positively impacting North Carolinians.

FOUNDATION PROGRAM PARTNER: Moore & Van Allen

“Moore & Van Allen’s commitment to pro bono is more than just supporting individual clients, it is supporting a network of resources that strengthen and advance access to justice. As such, we continue to seek opportunities for collective impact, working alongside our clients and community partners like the NCBF to ensure the law does not become a commodity limited to those who can afford it. We are proud to be in a position to lend assistance and celebrate those who we serve alongside.”

– Stephanie Marella Gryder, Senior Manager for Diversity and Community Initiatives

good understanding of what a lawyer is and the role lawyers play in the judicial system.”

High school students can make for a “tough crowd” in the middle of the school day, which only adds to the respect that Rehberg has for educators.

“That is not ‘prime time’ for their alertness and enthusiasm. My observation is that if you can capture their attention even a bit, you can plant the seeds of conviction and even activism.

“They ask insightful and challenging questions about our political and judicial systems that lay bare the glaring inequities that arise from being poor, from being female, from being Black or brown, from being a non-English speaker, from being undocumented, from lack of opportunity, education, access, and so much more. In my discussions with classes, I let them know that they have the power to do something about the unfairness they observe, if they work at it.”



Volunteers represent the NCBF and the legal profession during a career fair at Reedy Creek Magnet Middle School.

NCBF PRO BONO AND CIVIC EDUCATION PROGRAMS >

A power of greater good for the people of North Carolina.

4ALL Statewide Service Day

An annual, day-long “ask-a-lawyer” call-in program held in partnership with TV station hosts statewide that engages attorney volunteers to provide free legal information, resources and referrals to callers.

Career Fairs

Promoting the legal profession by engaging volunteers to share their knowledge and insights about what it means to be a legal professional to middle, high and college students. Attorneys and judges can volunteer during the school year at career fairs or virtual information sessions.

Housing Stability Project

A joint effort of the NCBF and NC Pro Bono Resource Center, in partnership with the NC Office of Recovery & Resilience. Housing Stability Pro Bono Project volunteers facilitate agreements between landlords and tenants to accept HOPE program terms to stabilize housing situations. This is a non-litigation, non-advocacy service to help bring parties to agreement.

Lawyers as Guest Speakers

Facilitating opportunities for meaningful interactions between middle and high school students and attorneys and judges who are willing to share their stories, perspectives and insights. Fostering this type of volunteer engagement helps students gain knowledge and understanding on topics such as the Constitution, the rule of law and the role of judges in our society.

Lawyers for Literacy

A program that matches legal professionals with local schoolchildren to improve students’ reading skills and spark their interest in books, civics and history.

McIntyre Youth Leadership Challenge

Inspiring and encouraging middle and high school youth to demonstrate the qualities of good citizenship by developing the skills required to seek solutions to problems within their local communities through research, public speaking and community action. A partnership with the North Carolina Bar Association Young Lawyers Division and the Law Day Committee.

Middle School Mock Trial

A collaboration with teachers, parents and volunteers to provide resources that support regional efforts to create mock trial and civic engagement experiences for middle school students.

NC Free Legal Answers

A 24/7 web-based platform where low-income clients log in and post their non-criminal legal questions. Volunteer attorneys then log in to their account and answer questions that are posted in the queue.



2022 McIntyre Youth Leadership Challenge recognition event.

NC Lawyers for Entrepreneurs Assistance Program (NC LEAP)

Coordinates attorney volunteers to provide pro bono business law advice and counsel to small business owners through webinars and clinics held in partnership with nonprofit organizations throughout the state that advise small business owners.

Patent Pro Bono Program

A partnership with Georgia Lawyers for the Arts, this program helps pair low-wealth inventors, nonprofits and small businesses with attorneys that assist them with application filings to the U.S. Patents and Trademarks Office.

Wills for Heroes

A partnership with local fire, police and EMS, this program hosts clinics where volunteer attorneys draft simple wills, health care power of attorney and financial power of attorney documents for first responders and their families, free of charge.



Wills for Heroes volunteer serving first responders.

VOLUNTEER SPOTLIGHT



Kimberly
Rehberg
City of Durham

I became engaged with the Lawyers in Schools initiatives through the NCBA Judicial Independence & Integrity Committee. Americans as a whole are woefully lacking in civic education. But schoolchildren are in a phase of their education where they are learning about the American political system and U.S. history. They're being introduced to concepts like separation of powers and federalism. They're being asked in their coursework to consume news stories and other content about criminal justice, lawmaking and policing. My experience over the past few years is that talking with students at this point in their education is helpful in bringing their coursework "to life." It is a tremendous opportunity for us, as lawyers and standard-bearers for the rule of law and our legal system, to have access to these students. It is also a humbling honor and an incredible gift.

Contact us at probono@ncbar.org to get involved in NCBF programs.



HONOR ROLL OF DONORS >



We are pleased to publish the 2021-2022 NCBF Honor Roll of Donors to recognize and thank those whose support helps the NCBF carry out its mission to unite the talent and generosity of our profession to be a power of greater good for the people of North Carolina. The steadfast and generous philanthropic commitments from these donors allow the NCBF to be responsive to statewide legal needs by mobilizing NCBA members to serve the people of North Carolina through pro bono and civic education programs. This work will continue into the 2022-2023 bar year, and together we will advance the NCBF values of access to justice, service through the profession, civic education, professionalism and diversity, equity and inclusion. With your support, we will live out the NCBF vision to be 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. On behalf of the North Carolina Bar Foundation and those we serve across our state, thank you!

Clayton Morgan
President, North Carolina Bar Foundation

Thank you for your support of the North Carolina Bar Foundation.

Cornerstone Society (\$10,000 - \$24,999)

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Lawyers Mutual Liability
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James F. Morgan
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Russell M. Robinson II

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FOUNDATION PROGRAM PARTNER: The Law Offices of James Scott Farrin

“The ethos of The Law Offices of James Scott Farrin and its attorneys perfectly aligns with the mission of the NCBF. We both strongly believe in providing service through pro bono work, legal professionalism and broadening civic education to demonstrate the value of our calling to others. As a Foundation Program Partner, the attorneys at our firm benefit by seeing the immediate and direct positive impact of their service on their community. Law should be used as a force for good and a means of effecting positive change throughout North Carolina. Pro bono service reinforces the reason many of us became attorneys in the first place. By partnering with the NCBF, we can amplify and maximize our efforts to broaden access to justice for all.”

– Coleman Cowan, Partner

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My first involvement with the NCBA was through the Young Lawyers Division. I served on and chaired the Law Day Committee, which included several civic education opportunities for young people. This was at a time when most civic education programs were sponsored by the YLD, and I had multiple opportunities during my time with that group to plan and participate in programs for adults, law students and schoolchildren throughout the state. When I was asked a few years ago to join the Foundation's Civic Education & Community Engagement Committee, I looked forward to getting back to civic education. It is important that we, as lawyers, give back to our state and communities – and participating in programs that educate North Carolina citizens on issues related to the rule of law, the judicial system and civics generally are important contributions to that effort.

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