



Indiana Pro Bono Commission
 230 East Ohio Street, Suite 400
 Indianapolis, IN 46204

**COMBINED 2008 DISTRICT REPORT, 2010 PRO BONO GRANT APPLICATION,
 AND 2010 PLAN**

Pro Bono District 9

Program Name: Whitewater Valley District 9 Pro Bono Commission

Mailing Address: P.O. Box 94

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Judicial Appointee: Honorable Darrin Dolehanty

Plan Administrator: Tammy Hopkins

Names of Counties served: Fayette, Franklin, Rush, Union, Wayne

Number and Percentage of volunteer attorneys (as defined on page 3) who rendered pro bono service to at least one low-income client during the year or who accepted a pro bono case in 2008 per registered attorneys in district, i.e. the district's pro bono participation rate:

8 % 8

Please also provide pro bono participation rates by county, if available.

<u>County</u>	<u>Registered Attorneys</u>	<u>Volunteer Attorneys</u>	<u>Participation Rate</u>
Fayette	20	6	30%
Franklin	17	4	23%
Rush	19	2	10%
Union	7	1	14%
Wayne	62	12	19%

Number of volunteer attorneys (as defined on page 3) who provided pro bono representation for at least 50 hours during 2008: 0

Number of potential clients requesting help in 2008 (limit this to actual intake done or sessions in which plan administrator or his/her delegate provided more than minimal assistance): 42

Number of potential clients who were actually provided with legal services (through volunteer attorney referral or assistance organized by the plan administrator) as a result of their request: 18 Please provide this information by county, if available. – See page 1A

Amount of grant received for 2009: \$ 30,500.00

Amount of grant (2009 & prior years) projected to be unused as of 12/31/09: \$42,081.26

Amount requested for 2010: \$37,500.00

Number of actual clients who were actually provided with legal service (through volunteer attorney referral or assistance organized by the plan administrator):

Fayette County	3
Franklin County	3
Rush County	1
Union County	0
Wayne County	11

2010 PLAN SUMMARY

- 1. Please write a brief summary of the 2010 grant request. Please include information regarding your district's planned activities including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion. The grant request should cover needs to be addressed, methods, target audience, anticipated outcomes, and how past difficulties will be addressed.**

The District 9 Pro Bono Commission will have scheduled committee meetings on the first Monday of every other month in order to oversee the actions of the plan administrator and to find ways to better help those who are in need of our services.

The Committee plans to hold its Fourth Annual Attorney Recognition Event to recognize those volunteer attorneys who have taken pro bono cases during the 2009 calendar year. Awards are given to those attorneys who have put in the most hours and demonstrated an outstanding commitment to the offering of their services on a pro bono basis. The Committee continues in their effort to have more attorney participation in the program. The plan administrator intends to continue doing mass mailings to all attorneys in the five counties and to continue to meet with Judges and Bar Association members of the Counties in order to enhance attorney participation.

In an effort to continue its mission to promote Commission Services, the Committee will utilize local newspapers, radio stations, and other media outlets. We continually place an informational flyer at every courthouse in all five counties, as well as distribute them to local social service agencies.

The Commission plans to participate in the fourth Talk To A Lawyer Today day as the third event generated tremendous interest. The Committee will continue to find ways to offer other days for the public to speak with an attorney for free.

2008 REPORT OF VOLUNTEER ATTORNEY CASES IN DISTRICT 9

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 3A. Please list one case per each line in the chart below. The information provided in this chart, and the charts immediately following, should be for the calendar year 2008 and not the fiscal year.

Definitions

Case: A legal matter referred to and accepted by a pro bono attorney volunteer. This includes mediation and GAL services.

Volunteer Attorney: An attorney who has rendered pro bono service to at least one low-income client during the year or accepted a pro bono referral from the identified program. This does not include attorneys who are in the list of pro bono volunteers but who have never taken a case. The case numbers do not include cases screened, only cases actually referred to a pro bono attorney. This also includes an attorney who has worked solely on a pending pro bono case that was neither opened nor closed during the reporting year. Volunteer attorneys for modest means programs may be counted, as long as they are separately identified as such.

Case Type: Please use the abbreviations listed in Indiana Supreme Court Administrative Rule 8(B)(3) or any other defined abbreviation. Please be sure to include the mortgage foreclosure code of MF, if applicable.

Program Name (includes legal service provider, court, plan administrator, bar association, and other organizations or individuals): **District 9 Pro Bono Commission**
IOLTA funding accounts for 100% of total pro bono provider budget. Please state the percentage of volunteers and cases which are attributable to IOLTA funding 100%. If this percentage is substantially more than the percentage of IOLTA funding, please explain.

Volunteer Attorney Name	County of case	Was case pending at beginning of 2008?	Was case opened in 2008?	Was case closed in 2008?	Number of hours worked on case if closed in 2008 (include prior years' hours)	Case Type
Ronald Wilson	Rush	No	Yes	Yes	8.25	DR
Craig Parker	Fayette	No	Yes	Yes	1.00	DR
David Butsch	Fayette	No	Yes	Yes	4.50	DR
Brenda Wilhelm-Waggoner	Fayette	No	Yes	Yes	1.40	DR
Michelle Cook	Franklin	No	Yes	No		DR
Brenda Wilhelm-Waggoner	Franklin	No	Yes	Yes	6.60	JP
Ronald Wilson	Franklin	No	Yes	Yes	5.0	DR
Ron Cross	Wayne	No	Yes	No		GU
TOTAL: 8	<i>No total needed</i>	TOTAL:	TOTAL:	TOTAL:	TOTAL: 26.76	<i>No total needed</i>

**2008 REPORT OF VOLUNTEER ATTORNEY LIMITED INFORMATION
ACTIVITY IN DISTRICT 9**

This limited legal information chart can include activities such as pro se clinics and call-in or walk-in informational services.

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 4A. Please list each attorney only once in the volunteer attorney column but complete one line for each type of legal information activity for that attorney.

Program Name (includes legal service provider, court, plan administrator, bar association, and other organizations or individuals): District 9 Pro Bono Commission

Volunteer Attorney Name	County	Type of Activity	Number of Hours
Donald Simkin	Wayne	Talk to a Lawyer Today	2.0
Steve Hunyadi	Wayne	Talk to a Lawyer Today	2.0
Michael Wilhelm	Wayne	Talk to a Lawyer Today	2.0
Brenda Wilhelm-Waggoner	Wayne	Talk to a Lawyer Today	2.0
Michael Douglass	Wayne	Talk to a Lawyer Today	2.0
Shane Edington	Wayne	Talk to a Lawyer Today	2.0
TOTAL:	6		TOTAL: 12.0
OVERALL VOLUNTEER ATTORNEY TOTAL:	6		OVERALL HOURS TOTAL: 12.0

2008 REPORT

Please list your District's 2008 activities—including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion—in chronological order.

<u>Date</u>	<u>Activity</u>
01/07/08	Board Meeting
01/21/08	Talk to a Lawyer Today
02/01/08	Temporary Plan Administrator Hired
02/04/08	Board Meeting
04/07/08	Board Meeting
06/02/08	Board Meeting
06/04/08	New Administrator Hired
07/07/08	Board Meeting
08/04/08	Board Meeting
09/01/08	Board Meeting
10/03/08	Administrator Retreat
10/06/08	Board Meeting
11/03/08	Board Meeting
12/01/08	Board Meeting
12/12/08	CLE Replay

2008 REPORT

Please provide a short summary of how the provision of pro bono service is coordinated in your district, including the intake process, the relationships of pro bono providers in the district, how referrals are made, and how reporting is done.

In 2008, the District 9 Pro Bono Program received phone calls through its local and toll-free phone numbers. Information was taken from potential clients through an intake process to ensure as best as possible clients were income eligible as well as conflict free. After prioritizing these clients, they were then matched with volunteer attorneys or placed on a waiting list to await an available attorney. A referral with a brief summary of the case was forwarded to the volunteer attorney. Once the volunteer attorney agreed to take the case, the client was contacted by the Plan Administrator with instructions regarding their initial appointment with their volunteer attorney. Status letters regarding each case were sent out to the volunteer attorney every ninety days. Final reporting hours were then submitted by the volunteer attorney upon conclusion of the case which was then documented by the Plan Administrator.

Please describe any special circumstances affecting your District's 2008 implementation of its plan.

After terminating the Plan Administrator in January, 2008, a temporary interim Plan Administrator was hired to answer voicemail and assign cases if possible. Two cases were placed by the temporary interim Plan Administrator. It was not until June 2, 2008, when the new Plan Administrator was hired, that the office began running on a regular basis.

The 2009 Grant has not been issued to District 9 as the 501(c)(3) is still with the Internal Revenue Service.

BUDGETS for 2008, 2009 and 2010					
Income Category	Final 2008 Income	2009 Actual Income To May 31, 2009	2009 Budget	2010 Budget	Difference between 2009 and 2010
A. INCOME					
1.IOLTA Grant Amount	\$55,500.00	\$30,500.00	\$30,500.00	\$37,500.00	\$ 7,000.00
2. Previous year carryover	\$ 2,611.45	\$40,353.42	\$40,353.42		
Other Income: <i>Explain source in narrative.</i>					
3.					
4.					
5. Total Income (sum of lines A1-A4)	\$58,111.45	\$70,853.42	\$70,853.42	\$48,500.00	
Expense Category	2008 Actual Expenditures	2009 Actual Expenditures to May 31, 2009	2009 Budget	2010 Budget	Difference between 2009 and 2010
B. PERSONNEL EXPENDITURES					
1. Plan Administrator (Salary & FICA)	\$11,881.04	\$ 8,464.64	\$20,000.00	\$22,500.00	\$ 2,500.00
2. Paralegals (Salary & FICA)	\$ 0.00	\$ 0.00	\$10,000.00	\$ 5,000.00	(\$ 5,000.00)
3.Support Staff Other – Please Explain					
4. Employee Benefits					
A. Insurance (WC, Health, Life)		\$ 0.00	\$ 3,600.00	\$ 5,000.00	\$ 1,400.00
B. Retirement plans					
C. Other- Please Explain					
5. Total Personnel expenditures (sum of lines B1-B4c)	\$11,881.04	\$ 8,461.64	\$33,600.00	\$32,500.00	\$ 1,100.00
C. NON-PERSONNEL EXPENSES					
1. Occupancy (include utilities)	\$ 2,200.00	\$ 1,200.00	\$ 2,400.00	\$ 2,400.00	\$ 0.00
2. Equipment Rental					
3. Office Supplies	\$ 572.03	\$ 588.10	\$ 4,000.00	\$ 1,000.00	(\$ 3,000.00)
4. Telephone	\$ 1,352.55	\$ 585.78	\$ 2,000.00	\$ 1,500.00	(\$ 500.00)
5. Travel	\$ 211.22	\$ 1,689.20	\$ 3,000.00	\$ 2,000.00	(\$ 1,000.00)
6. Training/Conferences		\$ 525.00	\$ 1,500.00	\$ 500.00	(\$ 1,000.00)
7. Library/Info. Technology			\$ 2,500.00	\$ 500.00	(\$ 2,000.00)
8. Malpractice Insurance/D&O insurance		\$ 1,455.70	\$ 4,000.00	\$ 1,500.00	(\$ 2,500.00)
9. Dues & Fees	\$ 7.14		\$ 2,000.00	\$ 500.00	(\$ 1,500.00)
10. Marketing & promotion	\$ 326.19		\$ 5,000.00	\$ 1,100.00	(\$ 3,900.00)
11. Attorney recognition			\$ 4,000.00	\$ 2,000.00	(\$ 2,000.00)
12. Litigation expenses	\$ 751.00		\$ 4,000.00	\$ 1,500.00	(\$ 2,500.00)
13. Equipment Acquisition	\$ 456.76	\$ 266.87	\$ 3,360.00	\$ 500.00	(\$ 2,860.00)
14. Contract Services					
15. Grants to other pro bono providers					
16. Other- Please Explain					
17. Total Non-Personnel Expenditures (sum of lines C1-C-17)	\$ 5,876.89	\$ 6,310.65	\$37,360.00	\$15,000.00	(\$22,360.00)
D. TOTAL EXPENDITURES (sum of B5 & C18)	\$17,758.03	\$14,772.29	\$70,960.00	\$47,500.00	
E. ENDING FUND BALANCE (A4 less D)	\$40,353.42	\$25,581.13	(\$ 6.58)		

2010 Budget Narrative

Please provide descriptions of the following line items in the foregoing budget chart, by item number, in the space provided. Please explain any other budget entries that are not self-explanatory, including other sources of income and any significant deviation in requests from previous years.

Lines (B) (1), (2), (3), (4) Please indicate the number of hours per week for each personnel position, rate of pay, and all employee benefits.

Plan Administrator: Part-time position \$19,470 per year

Line (C) (1) Please describe the occupancy cost in terms of square footage, utilities or other amenities and indicate whether the occupancy cost is above or below the market rate for that space.

We are currently renting space in the Robert Maley Foundation at a cost of \$200 per month. We are responsible for our own phone lines.

Line _____

One supplemental, explanatory page may be added to the end of this report and plan.

ANNUAL TIMETABLE FOR SUBMISSION OF FORMS AND CHECKS:

First week of January:	Checks distributed
July 1:	Annual report, plan and grant application due to IPBC
November:	Notification of awards
December 1:	IBF grant agreement due and revised budget due

