In 2016, SMRLS closed 9,514 cases, helping 25,558 people in need.

This includes 1,725 seniors, 765 clients with limited English proficiency and 2,787 persons with disabilities.
SMRLS mission is: To provide a full range of high quality legal services to low-income persons and eligible client groups in civil matters, in a respectful manner which enables clients to (1) enforce their legal rights; (2) obtain effective access to the courts, administrative agencies and forums which constitute our system of justice; (3) maintain freedom from hunger, homelessness, sickness and abuse; (4) empower persons and assure equal opportunity, thus, helping people to help themselves and become economically self-reliant, to the extent their individual abilities and circumstances permit.

SMRLS, through a diverse, respectful and fair working environment, and legal assistance and community education activities, promotes and respects the dignity of low-income persons and seeks new and effective solutions to the critical and common legal problems of low-income persons which arise in a broad community context.
It is with our heartfelt appreciation that we at Southern Minnesota Regional Legal Services (SMRLS) present our 2016 Annual Report.

SMRLS had many proud accomplishments in 2016. We provided service to a greater number of clients, established vital partnerships in our communities and expanded our Volunteer Attorney Program (VAP). We also helped more than 2,100 clients achieve better positioning for maintaining or finding housing and jobs.

Our services reached an astonishing number of people in 2016. We reached 25,558 people by closing 9,514 cases. In addition, an estimated 11,283 people attended SMRLS community legal education classes and received Pro Se Assistance. We served nearly 800 people with limited English proficiency, much of which can be attributed to the rising Karen population in St. Paul and the growing number of Middle Eastern refugees in the southeast Minnesota region. Astoundingly, the approximately 208,000 low-income people living in SMRLS’ service area make up 39.3% of the state’s population living in poverty. As the number of disadvantaged people we serve continues to rise, it demonstrates that our services are more needed than ever.

We were excited to announce the launch of the new Lawyers Advancing Wellness (LAW) partnership at the Open Door Health Center (ODHC) in Mankato in 2016. Through this healthcare-legal partnership, a SMRLS attorney is available every day at ODHC to work with healthcare staff to help low-income ODHC patients. The attorneys tackle legal issues contributing to poor health, such as lack of access to healthcare or utility shutoffs at their residences. It’s clear this partnership already has made an impact. In 2016, LAW closed 105 cases – 90 of these clients had no prior contact with SMRLS. Special thanks to the Blue Cross and Blue Shield Foundation for making this exciting partnership possible.

Last year also was a busy time for our Volunteer Attorney Program (VAP). Our volunteer attorneys provided service to 630 clients – 100 more than the previous year. Services included extended legal representation and brief legal advice and counseling. VAP saw a noticeable increase in the number of family law and domestic abuse cases. In fact, these cases made up 87% of all cases receiving VAP representation.

We were also proud to announce an addition to the SMRLS Executive Leadership, Chuck Thomas, as the new Director of Litigation and Advocacy. Chuck has worked as an attorney at SMRLS for 40 years. Chuck is leading SMRLS’ initiative to develop a more strategic approach to its litigation and advocacy initiatives.

As we approach the end of 2017, we hope to continue building on the momentum we achieved last year and extend it into 2018. Thank you for your continued support and strength of commitment to the mission of Equal Justice.

Chief Executive Officer  President, Board of Directors
In 2016, SMRLS closed 9,514 cases, affecting 25,558 low-income individuals and family members with critical civil legal need in Southern Minnesota. Through outreach, Pro Se Assistance, and community education classes SMRLS reached an additional 11,283 people.

In 2016, we helped our clients protect over $1.8 million of their critical household income and obtain an additional $2 million in new sources of critical income.

Our 2016 Extended Representation Case Outcomes are:
- 675 cases resulted in our clients better able to pay for daily necessities
- 397 cases resulted in our clients being less likely to be harassed by creditors
- 368 cases resulted in clients being in a better position to keep or find a job
- 1199 resulted in our clients being in a better position to keep or find housing
- 486 cases resulted in improved housing conditions
- 588 cases led to clients being physically safer
- 1160 resulted in improved quality of life

*Data provided by Minnesota Legal Services Coalition’s Economic Impact Measurements of Minnesota Legal Aid report.*
Volunteer Attorney Program

Highlights from 2016

Last year was another successful year for Volunteer Attorney Program (VAP), which closed 630 of the firm’s 9,514 cases in 2016 (a 19% increase compared to 2015). The 132 attorneys involved in VAP volunteered 4,250 hours dedicated to serving individuals and families at or below 200% of the federal poverty guidelines. Many volunteers provided brief legal services at clinics focused on writing wills for seniors and single parents, pursuing eviction and criminal expungements, and completing uncontested divorces.

We were excited to receive funding from UCare to support our Wills for Seniors and Single Parents clinics. We also received increased funding from the Legal Services Advisory Committee (LSAC) to hire a new staff person to focus on these brief services clinics.

“I am so grateful for the kind, considerate, professional help. I don’t know what I would have done without you.”

Here are a few VAP highlights from the past year:

• A family law volunteer spent 52 hours helping a client win full legal and physical custody for her client who was a former victim of human trafficking.

• A long-time volunteer attorney spent 10.5 hours working with a client on her unemployment insurance application. By negotiating with the employer, the client got her job back and was assigned to a different shift than one that involved a hostile supervisor.

• A VAP attorney volunteered 34 hours for a client with a wrongful termination claim, who also was denied unemployment insurance. After two unemployment compensation hearings with the client’s two former employers, the Unemployment Law Judge reversed the client’s ineligibility in both cases.

Volunteer Attorney Profile

Family law attorney Kathryn Graves, Henson and Efron, PA., has volunteered for SMRLS since 1985. Kathryn practices family law. In addition to her affiliation with SMRLS, Kathryn serves on the Board of Managers for the Minnesota Chapter of the American Academy of Matrimonial Lawyers and participates in the Volunteer Lawyer’s Networks and Hennepin County’s “Limited Scope” attorney program.

Kathryn’s daughter, Jennifer Pusch, a tax attorney at Fredrikson & Byron, PA., has helped three clients since she began volunteering at SMRLS in 2016. Jenny’s spouse, Michael Mather, HKM Law Group, also started volunteering at SMRLS in 2016 and has worked with 7 clients. Michael takes cases involving contracts, insurance, and landlord/tenant cases.

The Graves-Pusch-Mather family is a shining example of the impact the SMRLS volunteer attorneys make in the community. We look forward to another successful year of the Volunteer Attorney Program.

For more information on volunteering with SMRLS, please contact SMRLS’ VAP Coordinators:

Carol Bros
Metro
(651) 222-5863
carol.bros@smrls.org

Kelly Kinyon
Outstate
(507) 387-5588
kelly.kinyon@smrls.org

Mary Stoos
Pro Se Divorce Clinics
(507) 454-6660
mary.stoos@smrls.org
In Minnesota there is

1 Legal Aid Staff Attorney for every 2,977 eligible clients.

In order to meet the demand for legal help, SMRLS relies on private attorneys to provide free legal services to our clients.

SMRLS 2016 VAP Statistics

132 Volunteer Attorneys representing clients.

284 brief service clinics

660 cases closed by Volunteer Attorneys.

4,250 Hours Volunteered in 2016 by SMRLS Volunteer Attorneys.

115 volunteers have served SMRLS clients for over 10 years.
25 volunteers have served SMRLS clients for over 30 years.
On February 8, 2016, SMRLS hosted the 14th annual Lawyers on Ice Hockey Event at the Xcel Energy Center. More than 60 lawyers and friends participated from the organizations of Robins Kaplan, Western National, Martin & Squires, Stinson Leonard Street, Ogletree Deakins, Meagher Geer, and Larson King, Briggs & Morgan, and James Ysebaert-Merrill Lynch. The team comprised by Ogletree Deakins/Meagher Geer won the championship game 8-7 over Robins Kaplan/Western National. A big thanks to the referees Dan Kovarik, Ross Gibbs, Dan Stumpf, and announcer Steve Kirsch, who donated their time; and to Susan Hubbard, Jack Larson and Travis Larson of the Minnesota Wild; St. Paul River Centre; Xcel Energy Center for allowing us to use the Xcel Energy Center; and Marnie Girard of Levy Restaurants, who provided the great food.

SMRLS celebrated another year of amazing staff, volunteers and supporters at the 26th Annual Fall Appreciation Luncheon on November 22, 2016 at the St. Paul InterContinental Hotel. Long-time SMRLS supporter, John Degnan, Campaign for Legal Aid member and Briggs and Morgan attorney, was honored with the prestigious Lifetime Leadership Award. Attorneys Ray Beckel and Julia Craig were awarded with the 25 Year Staff Award for their incredible longevity of service as SMRLS attorneys. Marina Gillard, Sheryl Riemersma, and Jeannie Williams were also honored for working 25 years at SMRLS. Keynote Speaker, Hilarie Bass, the law firm of Greenberg Traurig’s Co-President and President-Elect of the American Bar Association (ABA), addressed the audience on issues of access to justice by explaining the role of technology, emphasizing the importance of Pro Bono work, and discussing the groundbreaking report on the ABAs Commission on the Future of Legal Services.

The 9th Annual Social Justice Uncorked event held at the Loews Hotel in Minneapolis on September 23 was a great success. Thanks to more than 250 people in attendance, our corporate and firm representatives, sponsors, and SMRLS partners raised more than $150,000 for the Campaign for Legal Aid! Special guests were celebrated during the second annual “Toast for Justice,” and Richard Duncan from Faegre Baker Daniels LLP accepted the prestigious 2016 Social Justice Award for their event support over the last 5 years. Former SMRLS client, Gabbie, and her son, Vlad, captivated the room with their story of how SMRLS’ family law unit (and Metro Family Law Lead Attorney, Valerie Snyder), changed their lives. Special thanks to Uncorked Honorary Co-Chairs Karin Nelsen (MN Vikings), Mary Giesler (MN Twins), Steve Weinreich (MN Wild), and the 2016 Uncorked Planning Committee for their efforts in making this event possible.

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2017 Events

September 22, 2017

Social Justice UNCORKED!™

Honorary Chair
Keith Ross
Chief Legal Officer of the Minnesota Super Bowl Host Committee

Loews Hotel
Minneapolis, MN
6:30PM to 9:00PM

Fabulous wine, craft brew, and non-alcoholic beverage tastings and heavy appetizers. Featuring a SMRLS superhero selfie station and a lively auction with many exciting items.

November 21, 2017

Fall Appreciation Luncheon

Keynote Speaker
Hon. Mark J. Kappelhoff
Fourth Judicial District

Judge Kappelhoff will discuss social justice and his Department of Justice investigations in Ferguson, Missouri.

InterContinental Saint Paul Riverfront
St. Paul, MN
11:00AM to 1:30PM

Featuring the presentation of the Lifetime Leadership Award and the Charlton H. Dietz and Bruce A. Beneke Legal Services Staff Outstanding Services Award.
Event Sponsors

The following firms, organizations and individuals generously provided sponsorship support to one or more of the events in 2016

3M
Abbot Downing
Andersen Corporation
Aon
Aztek/Bieber Family Foundation
Alliance Bank
Barnes & Thornburg
Bassford Remele
Best Buy
Blackwell Burke
Bowman and Brooke
Briggs and Morgan
Chestnut Cambronne
Collins, Buckley, Sauntry & Haugh
Creative, Integration and Design
Dietz Family and Friends
Dorsey & Whitney
Dykema Gossett
Ecolab
ECMC, Group
Eventis Telecom
Faegre Baker Daniels
Felhaber Larson
Foley Mansfield
Fox Rothschild
Fredrikson & Byron
Gaskins Bennett Birrell Schupp
Gene Link & Ann Marie Hirsch
Great River Energy

Greenberg Traurig
Greene Espel
Hegardt Foundation
Harper & Peterson
Katherine Harris
Kelley, Wolter & Scott
Larson King
Lindquist & Vennum
Lommen Abdo
Mairs and Power
Malkerson, Gunn & Martin
Martin & Squires
Maslon
Mayo Clinic
Meagher Geer
Medica
Medtronic
Michelle Miller
MN CLE
MN Lawyers Mutual
MN Public Utilities Commission
MN State Bar Association
Mitchell Hamline
Morrison Sund
MSP Commercial
Murnane Brandt
Nilan Johnson Law Firm
Ogletree Deakins
Olander Law Group

Opus
Paul C. Bantle
PIKA Software
Reatha Clark King
Robins Kaplan
Ryan Family Foundation
Schwan’s
Bill Sieben
Sieben Polk
Sieben Carey
Stinson Leonard Street
St. Paul Foundation Match
TCF Bank
Thomas K. Keller
Thomson Reuters
Justice Esther Tomljanovich
Travelers
Tuft, Lach, Jerabek, O’Connell
UMN Law School
UST School of Law
United HealthGroup
US Bank
Western National
Whitney Foundation
Winthrop & Weinstine
Xcel Energy
James Ysebaert-Merrill Lynch

The following judges / courts attended the 2016 Fall Luncheon

Chief Judge Michael J. Davis and Judge Donovan W. Frank
Judge Steven Rau and Judge Tony Leung
Judges of the Second Judicial District
Minnesota Office of Administrative Hearings
Minnesota Court of Appeals
Minnesota Supreme Court
United States District Court
The need for legal services remains great. However, by working together we can inspire real change. Each and every donation has a direct, positive impact on the lives of those we serve. To learn more about making a gift that works for you, please contact Lindsay Davis, Director of Philanthropy at 651-894-6909.

Direct Donation:

Your donation – of any amount – will be counted to our Annual Campaign. Funds will used to support direct client services, providing critical legal assistance and ensuring that justice is not based on what one can afford. Gifts can be mailed to our Administrative Office (see page 13) or made online at smrls.org/donate.

Volunteer:

The need for legal help is ever great. If you are an attorney looking to make a donation of time and service, please consider SMRLS and our low-income client community. More information can be found on page 5.

Planned Giving:

SMRLS has been providing equal access to justice for over 100 years. To ensure that the same service is available to coming generations, please consider making a planned gift, either as part of your estate or to commemorate a cornerstone event: a birth, a graduation, a retirement, or other joyous occasion.
THANK YOU
2016 SMRLS Leadership

Board of Directors

President
Gail M. Olson

1st Vice-President
Matt L. Benda

2nd Vice-President
Brenda Devlin

Treasurer
Thomas B. Hatch

Secretary
Kari L. Valley

Ali Abdullahi
Andrew M. Baese
Kathy Bartz
Hon. Timothy Connell (Ret.)
Mark W. Delehanty
Emma Hilliard
Suyapa Miranda
Sonja Miller
Terrance C. S. Newby
Brett W. Olander
Jonathan J. Oviatt
Abdi Sabrie
Brett Stand

Campaign for Legal Aid:
Urban Leadership Committee

Chair
Steve Kirsch

Stuart Alger
Thomas A. Boardman
Thomas H. Boyd
Angela B. Brandt
Stacy A. Broman
John M. Degnan
Richard A. Duncan
Bernie M. Dusich
Kevin P. Goodno
LB Guthrie
Beverly Jones Heydinger
Timothy Hughes
Ann Huntrods
Joseph T. O’Neill
Michael D. O’Neill

Joseph H. Otterstetter
Paul D. Peterson
Katie Pfeifer
Peter A. Schmit
Daniel L. Scott
Christopher M. Scotti
Jon A. Theobald
Kyle M. Thomas
William L. Tilton
Hon. Esther Tomljanovich
Terry L. Wade (Emeritus)

Campaign for Legal Aid:
Southwest Campaign Committee

Jill K. Baker
William S. Partridge
Steven R. Sunde
Andrew A. Willaert
Ken White

1909 Legacy Society

Chair
John M. Degnan

Bruce A. Beneke
Thomas A. Boardman
Darlene M. Cobian
Kevin W. DeVore
Charlton H. Dietz
Michael J. Galvin, Jr.
Kent A. Gernander
Susan M. Holden
Hon. A. M. (Sandy) Keith (Ret.)
Joseph T. O’Neill
Jonathan J. Oviatt
William S. Partridge
Jon A. Theobald
Terry L. Wade
Perry M. Wilson, III
Office Locations

Administrative Office
1000 Alliance Bank Center
55 East 5th Street
St. Paul, MN 55101

Albert Lea Office
132 North Broadway
Albert Lea, MN 56007

Eastside and American Indian Office
579 Wells Street, #100
St. Paul, MN 55130

Education Law Project
450 North Syndicate Street, Suite 285
St. Paul, MN 55104

Minnesota Family Farm Law Project
12 Civic Center Plaza, Suite 3000
Mankato, MN 56001

Mankato Office
12 Civic Center Plaza, Suite 3000
Mankato, MN 56001

Refugee, Immigrant, and Migrant Services – St. Paul
450 North Syndicate Street, Suite 285
St. Paul, MN 55104

Refugee, Immigrant, and Migrant Services – Rochester
2500 Valleyhigh Drive Northwest
Rochester, MN 55901

Refugee, Immigrant, and Migrant Services - Moorhead
1015 7th Avenue North
Moorhead, MN 56560

Rochester Office
903 West Center Street, Suite 130
Rochester, MN 55902

St. Paul Central Office
400 Alliance Bank Center
55 East 5th Street
St. Paul, MN 55101

Shakopee Office
712 Canterbury Road South
Shakopee, MN 55379

Winona Office
66 East 3rd Street, Suite 204
Winona, MN 55987

Worthington Office
1567 North McMillan Street, Suite 6
Worthington, MN 56187

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Twitter @smrlsmn

LSC
United Way

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## 2016 Financials

**SOUTHERN MINNESOTA REGIONAL LEGAL SERVICES, INC.**

**STATEMENT OF FINANCIAL POSITION**

December 31, 2016

(With Comparative Totals for 2015)

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CURRENT ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$ 1,662,334</td>
<td>$ 2,396,498</td>
</tr>
<tr>
<td>Certificates of deposit</td>
<td>2,100,000</td>
<td>2,100,000</td>
</tr>
<tr>
<td>Client escrow funds</td>
<td>1,167</td>
<td>1,167</td>
</tr>
<tr>
<td>Grants and contracts receivable</td>
<td>1,109,201</td>
<td>994,074</td>
</tr>
<tr>
<td>Pledges receivable</td>
<td>1,921,208</td>
<td>2,003,085</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>100,307</td>
<td>155,497</td>
</tr>
<tr>
<td>Investments</td>
<td>10,248</td>
<td>8,661</td>
</tr>
<tr>
<td><strong>TOTAL CURRENT ASSETS</strong></td>
<td>$ 6,964,515</td>
<td>$ 7,638,982</td>
</tr>
<tr>
<td><strong>PROPERTY AND EQUIPMENT, at cost</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Furniture, fixtures and equipment</td>
<td>365,371</td>
<td>365,371</td>
</tr>
<tr>
<td>Leasehold improvements</td>
<td>223,695</td>
<td>223,695</td>
</tr>
<tr>
<td>Law library</td>
<td>382,385</td>
<td>382,385</td>
</tr>
<tr>
<td>Less: accumulated depreciation</td>
<td>(885,831)</td>
<td>(848,138)</td>
</tr>
<tr>
<td><strong>TOTAL PROPERTY AND EQUIPMENT, net</strong></td>
<td>$ 85,600</td>
<td>$ 123,313</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$ 7,050,115</td>
<td>$ 7,752,295</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CURRENT LIABILITIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts payable</td>
<td>$ 210,513</td>
<td>$ 226,784</td>
</tr>
<tr>
<td>Client trust deposits</td>
<td>1,167</td>
<td>1,167</td>
</tr>
<tr>
<td>Accrued expenses</td>
<td>617,376</td>
<td>665,163</td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>68,615</td>
<td>854,162</td>
</tr>
<tr>
<td><strong>TOTAL CURRENT LIABILITIES</strong></td>
<td>$ 977,763</td>
<td>$ 1,747,776</td>
</tr>
</tbody>
</table>

**NET ASSETS**

Unrestricted

- Undesignated | 433,880 | 307,261 |
- Board designated | 3,483,857 | 3,467,734 |
- Temporarily restricted | 2,201,465 | 2,230,024 |

**TOTAL NET ASSETS** | $ 6,122,412 | $ 6,005,019 |

**TOTAL LIABILITIES AND NET ASSETS** | $ 7,050,115 | $ 7,752,295 |
## 2016 Financials

**SOUTHERN MINNESOTA REGIONAL LEGAL SERVICES, INC.**  
STATEMENT OF ACTIVITIES  
For the Year Ended December 31, 2016  
(With Comparative Totals for 2015)

<table>
<thead>
<tr>
<th>SUPPORT AND REVENUE</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Total 2016</th>
<th>Total 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants and contracts</td>
<td>$ 6,038,108</td>
<td>$ 2,093,831</td>
<td>$ 8,131,939</td>
<td>$ 8,086,566</td>
</tr>
<tr>
<td>Other support</td>
<td>1,124,147</td>
<td>-</td>
<td>1,124,147</td>
<td>1,272,656</td>
</tr>
<tr>
<td>In kind contributions</td>
<td>753,222</td>
<td>-</td>
<td>753,222</td>
<td>772,801</td>
</tr>
<tr>
<td>Program fees</td>
<td>30,250</td>
<td>-</td>
<td>30,250</td>
<td>79,000</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>7,155</td>
<td>-</td>
<td>7,155</td>
<td>7,660</td>
</tr>
<tr>
<td>Investment income</td>
<td>17,544</td>
<td>-</td>
<td>17,544</td>
<td>14,958</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>2,119,190</td>
<td>(2,119,190)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>TOTAL SUPPORT AND REVENUE</strong></td>
<td>10,089,616</td>
<td>(25,359)</td>
<td>10,064,257</td>
<td>10,233,641</td>
</tr>
</tbody>
</table>

### EXPENSES

| Program services         | 8,530,554 | 8,530,554 | 8,504,919 |
| Supporting services      |           |           |           |
| Management and general   | 1,045,647 | -         | 1,045,647 | 1,068,860 |
| Fundraising               | 370,663   | -         | 370,663   | 340,289   |
| **TOTAL EXPENSES**        | 9,946,864 | -         | 9,946,864 | 9,914,068 |

| CHANGE IN NET ASSETS      | 142,752   | (25,359)  | 117,393   | 319,573   |

| NET ASSETS, BEGINNING    | 3,774,995 | 2,230,024 | 6,005,019 | 5,685,446 |
| NET ASSETS, ENDING       | 3,917,747 | 2,204,565 | 6,122,412 | 6,005,019 |