A Letter From Us
CEO and Board President

As we enter our 110th year of providing access to justice to thousands of low-income people in Minnesota, we must first look back at our achievements and milestones from the past year. It is with great pleasure that we present to you the 2018 Annual Report of Southern Minnesota Regional Legal Services (SMRLS).

In 2018, SMRLS attorneys and pro bono attorneys closed a total of 9,051 cases, including 8,000 by SMRLS staff and 900 by volunteer attorneys. Through our case work, outreach and additional community education programs, SMRLS staff served 23,902 people state-wide, including more than 800 clients with Limited English Proficiency, largely due to our healthcare-legal partnerships and Agricultural Worker Program that primarily serve immigrants and migrant workers.

Last year, our Volunteer Attorney Program continued to serve an important role in SMRLS’ community outreach services. SMRLS had more than 300 active volunteers, who took 684 cases and reported 3,663 hours of service in 2018. We established several new volunteer-led clinics, including the Ramsey County Housing Court Clinic, which launched on July 26, 2018. This walk-in clinic provides on-site consultation for clients before they enter Housing Court. This clinic has proven to help our clients understand their rights and increase their likelihood of receiving a favorable outcome in court.

Several high-profile cases involved SMRLS in 2018. In one of our more prominent cases in recent years, SMRLS attorneys successfully argued an appeal at the Minnesota Supreme Court. The case, Christansen v. Healey, focused on whether to apply the Minnesota best-interests-of-the-child standard or the endangerment standard to the father’s motion to increase his parenting time to every other week. As a result of the Minnesota Supreme Court’s decision, following a successful appeal made by SMRLS attorneys, district courts now must evaluate modification motions under the totality of the circumstances to decide if it is a substantial change that would modify the parties’ custody arrangement.

Our innovative healthcare-legal partnerships (HLPs) at Open Door Health Center in Mankato, and Bethesda Family Medicine Clinic and Children’s Minnesota Hospital in Saint Paul, continued to deliver successful and life-changing services to hundreds of clients in 2018. In these partnerships, SMRLS attorneys are paired with medical professionals to provide patients with a holistic approach in identifying and treating their health-harming legal needs. Often times, attorneys recognize legal solutions to issues standing in the way of a patient’s health. Because of these partnerships, many patients have access to legal help that they would not otherwise receive.

We continued to make strides in our Strategic Plan in the past year. In May 2018, SMRLS hired Leslie Paulus for the newly created Director of Business Administration position. In this role, Ms. Paulus is advancing SMRLS’ strategic plan, as well as overseeing IT, Client Intake and Hotline, Volunteer Attorney Program teams, and regional leaders. As part of the Technology Vision, Strategy & Customer Service Orientation segment of the Strategic Plan, we upgraded and invested in new infrastructure and improved digital security; updated important policies for Procurement, Disaster Recovery, and Data Protection; and we surveyed SMRLS staff to identify the strengths and weaknesses of our telephone and network systems. These advancements allow SMRLS to provide seamless and effective services to our clients.

Thank you to our dedicated staff, volunteers, and community partners for their ongoing support of SMRLS and our clients in 2018. We would not be able to reach 110 years of delivering high-quality legal services without their professionalism and commitment to equal justice.

Jessie Nicholson
CEO

Brett Olander
Board of Directors, President
About SMRLS

Southern Minnesota Regional Legal Services (SMRLS) is Minnesota’s oldest provider of legal aid. For 110 years, SMRLS has provided free, high-quality legal services to low-income people in critical civil matters. Approaching each client with respect and compassion, we help individuals and families maintain freedom from hunger, homelessness, sickness, and abuse. Because, Justice Matters®.

Mission Statement

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.

What We Do

Through our expert staff and a network of committed volunteer attorneys, we offer free legal help to low-income and senior citizen (60+) clients in a full range of civil matters in 33 counties of southern Minnesota, including the east and south metro, along with agricultural workers throughout North Dakota and Minnesota. Our talented and diverse staff is dedicated to helping members of our community preserve and maintain life essentials—income, health, safety, and shelter.

Contact Us

Administrative Office
800 Alliance Bank Center
50 East 5th Street
St. Paul, MN 55101
(651) 224-9821
(651) 226-4350 FAX
cba@smrls.org

Client Intake
1-888-575-2954

Office Hours:
Friday, 9:00 a.m. - 11:45 a.m.
and 1:00 p.m. - 3:00 p.m. CST

Justice@Minn.org

Find Your Location
To get help call 1-888-575-2954 or apply online at www.smrls.org.
In 2018:

Critical Income and Benefits

Protected for Our Clients: $2,122,177

Recovered for Our Clients: $1,603,050.93

Our Client Work in 2018

- 9,051 Cases closed by SMRLS staff and volunteer attorneys
- 45% Ensuring access to safe, affordable housing
- 18% Keeping children and families safe
- 16% Protecting individual rights
- 11% Protecting essential income
- 3% Supporting our Seniors
- 2% Other
- 1% Helping students thrive
- 4% Standing up for immigrants
Demographic Data for Civil Case Clients

2018
TOTAL NUMBER OF PEOPLE IN HOUSEHOLDS SERVED
23,902

Ages of Clients

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<tr>
<td>Proficiency With Disabilities</td>
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Race/Ethnicity

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Gender of Clients

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<td>Women</td>
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<tr>
<td>Men</td>
<td>2163</td>
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<td>Other</td>
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Ways to Support SMRLS

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 cla@smrls.org or (651) 228-9823.

Direct Donation

Your donation — of any amount — will be counted to our Annual Campaign. Funds will be 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 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. To learn more or to volunteer, please contact Carol Bros, Volunteer Attorney Program Supervisor, at carol.bros@smrls.org or 651-222-5863.

Planned Giving

SMRLS has provided equal access to justice for over 110 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.
2018 was a time of growth for SMRLS’ Agricultural Worker Project (AWP). AWP is a specialized unit of SMRLS that provides legal representation, education, and outreach to agricultural workers throughout Minnesota and North Dakota regarding employment-related legal issues. With the help of five temporary bilingual outreach advocates, AWP visited agricultural workers temporarily housed at more than 500 locations in Minnesota and over 250 locations in North Dakota last year. Through its outreach, AWP spoke with approximately 1,050 agricultural workers in Minnesota and 260 agricultural workers in North Dakota to inform them of their workplace rights and AWP’s services. AWP continued its outreach by distributing approximately 4,000 legal rights calendars throughout both states to agricultural workers and other community partners.

AWP diversified its outreach strategies in 2018 by establishing two Healthcare-Legal Partnerships (HLPs) with clinics that serve agricultural worker patients. One HLP is with Community Health Services in Grafton, North Dakota while the other partnership is with the CARE Clinic in Red Wing, Minnesota.

"This Healthcare-Legal Partnership benefits AWP’s client base by providing an opportunity to meet one-on-one with AWP staff in a confidential space where individuals feel comfortable speaking about their legal concerns," Gracia Johnson, an AWP paralegal/outreach worker who helps staff the HLP at the CARE clinic, said. "The CARE Clinic is very familiar to the Red Wing community and allows an avenue for AWP to build trust with local agricultural workers while increasing awareness of SMRLS’ variety of legal services available to this region of the state."

As a result of effective outreach, AWP experienced an increase in the number of workers seeking assistance with their employment-related legal issues in 2018. AWP hired an additional staff attorney in July to assist with the growth in its caseload. AWP closed over 75 cases within its new employment-related case priorities in 2018. The unit is currently handling ongoing cases related to wage theft, H-2A contract violations, employment discrimination, labor trafficking, and more.
In 2018, Southern Minnesota Regional Legal Services’ (SMRLS) healthcare-legal partnerships provided legal support to hundreds of low-income clients. SMRLS is currently partnered with Bethesda Family Medicine Clinic, Children’s Minnesota, and the Amherst Wilder Foundation in Saint Paul and Open Door Health Center in Mankato.

In a healthcare-legal partnership, SMRLS attorneys and medical professionals work together to identify health-harming legal needs that stand in the way of patients’ health and well-being. This includes help with housing, public benefits, immigration, family law, and others. Through this holistic approach, patients receive increased access to protections and resources that allow them to meet their basic needs, leading to the improvements in health and well-being for the patients and their families. Depending on a patient’s situation, onsite attorneys are able to provide a full range of legal services to patients.

SMRLS attorneys hold regular office hours at the medical clinics or hospital to eliminate the barriers that clients sometimes face when seeking legal help, such as transportation or job constraints. For some clients, a referral from a trusted medical provider helps to ease possible uncertainties about seeking legal help.

“I can really see the direct benefit of working onsite at Children’s. Having an office on the hospital campus eliminates barriers to access that would prevent most families from receiving our help,” SMRLS HLP attorney Brianna Boone says. Ms. Boone holds regular office hours at Children’s Minnesota’s St. Paul Campus, providing legal assistance to children and families.

Healthcare-legal partnerships also provide an opportunity to build a foundation for treating patients in the future. Bethesda Family Medicine Clinic in Saint Paul hosts one of the University of Minnesota’s family medicine residency programs. By working directly with the onsite attorney, medical residents are learning to identify health-harming legal problems and when to recommend a patient to an attorney to help with those problems.

Dr. Kathryn Freeman, a family medicine physician at Bethesda and assistant professor at the University of Minnesota’s Department of Family Medicine and Community Health, has personally seen the benefits of a healthcare-legal partnership and the presence of SMRLS attorney Rebecca Dodson onsite at the clinic.

"Rebecca helps us to think further outside the box about the different things that are happening in our patients' lives that are affecting their health. Whether it's their ability to be safe at home, access to a safe place to sleep at night through secure housing, or access to benefits that support healthy food, she helps us think beyond the tools we typically think of in medicine, helping us to provide more comprehensive health care to our patients," Dr. Freeman says.

To learn more about SMRLS’ healthcare-legal partnerships, please contact SMRLS supervising attorney Meghan Scully at meghan.scully@smrls.org.
Southern Minnesota Regional Legal Services (SMRLS) prides itself on its long tradition of community lawyering and its history of meeting clients in their homes and communities. Through this practice, SMRLS sought to educate community members about their rights as tenants. SMRLS partnered with the Cultural Wellness Center (CWC) to lead an eight-week training series to further this goal. The CWC is a Twin Cities-based non-profit focused on fostering healthy communities. It was a natural fit for SMRLS and the CWC to collaborate on developing this training series.

Fifteen students signed up for the class at the CWC where SMRLS’ Housing Attorneys taught them how the eviction process works, whether criminal or eviction expungements were available options to them, and how to correct information contained within tenant screening reports.

The collaboration aimed to help people understand their rights and obligations as tenants, repair their rental and credit history, and ultimately, market themselves as better tenants and future homeowners. Through a comprehensive approach, the CWC focused on empowerment, the cultural consequences of evictions on people of color, and the implications for children facing unstable living environments and displacement.

But having the opportunity to learn about the on-the-ground realities of low-income renters of color from the participants of the class also provided a benefit to the SMRLS attorneys.

SMRLS’ Housing Attorney, Christopher Scott, who spearheaded the trainings, notes, “It was exciting for me to see the significant growth in the students’ understanding of both the legal and practical components presented.”

This program demonstrated what SMRLS and other legal service providers already knew: taking a proactive approach to housing issues prior to the initiation of legal proceedings promotes housing stability and prevents homelessness. Knowledge is a powerful tool.
"Great things never came from comfort zones" is how the motivational cliché goes. But it’s true, and SMRLS now has its own version of this quote, *"There is no growth in the comfort zone," printed on buttons — for all staff.* Why? Because legal aid is changing at an astonishing rate, including our client demographics, the issues they face, the resources available to assist them, and the community around them; because legal technology is developing at breakneck speed; and because our funders are changing their priorities and their expectations from us. SMRLS is poised to capitalize on the opportunities this change presents, because we are deeply engaged in the strategic planning that began several years ago.

2018 marked the transition into the second phase of the strategic plan. With the conclusion of the first phase, SMRLS transformed its senior leadership structure by adding a Director of Business Administration. In addition, the practice groups completed their first round of strategic planning, including identifying opportunities for community impact work. SMRLS established the foundation for the transformation of the firm’s technology infrastructure and began a relationship with a third party technology support vendor. Intake and hotline functions, the “front door” to our services for clients, is now streamlined and enhanced to better support our clients.

The addition of the Director of Business Administration position to the staff is representative of a commitment from SMRLS to enhancing our business processes to function more efficiently. The Director of Business Administration has oversight of the intake and hotline functions for the firm, technology staff and systems, the Volunteer Attorney Program and the Firm Regional Leaders, as well as supplying data analytics support to all aspects of the firm. The Director of Business Administration brings a strong background in data driven decision making and business process improvement to the firm and is using those skills to move the firm forward in many areas. For example, strengthening the firm IT infrastructure through new unified communications vendors, an improved network architecture, a structured hardware and software replacement program, and a new case management system.

The second phase of the SMRLS Strategic Plan builds off the successes of the first and moves the firm boldly forward. Firm culture and employee engagement remain a focus, as well as increasing diversity and improving employee retention. Practice groups will leverage their first round of strategic planning and improved data and outcomes analysis to look for more and bigger opportunities to impact our communities. Intake will incorporate new technology tools to improve capacity and client service, while playing a key role in a statewide coordinated intake project. SMRLS looks forward to providing continued updates on our preparation for an exciting, client-focused future.
In 2018, SMRLS’ Volunteer Attorney Program (VAP) continued to provide a full range of legal services, including full representation, brief services, and advice only. Volunteer Attorneys take cases to supplement our staff attorneys’ workload, including housing, family law, immigration, and other types of cases, and take cases in areas where SMRLS staff attorneys do not practice. These cases include debtors’ protection, consumer and insurance, employment, guardianships/conservatorships, probate, estate planning and tax law. SMRLS currently has more than 300 active Volunteer Attorneys. Our volunteers come from large firms, mid-size and small firms, solo practitioners, corporate legal departments, and some retired attorneys.

Last year, SMRLS volunteers took 684 cases and reported 3,663 hours of service.

SMRLS also offers several brief services clinics. The clients are pre-screened for these clinics to ensure they are a good solution given the client’s particular legal needs and capabilities. SMRLS provides document forms, notary services, laptop computers, a printer, and internet access so we can provide these services at a wide variety of locations. Volunteer Attorneys assist clients to complete all the necessary documents. Law clerks and other Volunteer Attorneys work directly with a client to fill out the documents. Clients go to court on their own, but the Volunteer Attorneys coach them on the process. These clinics include:

Uncontested Divorce Clinics
A SMRLS’ VAP staff person handles the serving and filing of the cases and explains the process to the clients. In 2018, SMRLS held clinics in Mankato, Owatonna, Shakopee, St. Paul, Winona and Worthington. Due to a grant from the Mower County Law Library in mid-2018, SMRLS now holds quarterly clinics in Austin. SMRLS closed over 200 cases for divorce clinic clients in 2018.

Wills Clinics
SMRLS holds clinics to draft estate planning documents for clients, including Wills, Healthcare Directives, and Financial Powers of Attorney. Most of the clients are seniors, but single parents also attend. In 2018, SMRLS held clinics in Faribault, Farmington, La Crescent, Prior Lake, St. Paul and St. Peter, and served 62 clients.

Eviction Expungement Clinics
SMRLS held 9 Eviction Expungement clinics in 2018, serving 29 clients, many of whom needed multiple criminal record expungements. This clinic is currently held in St. Paul and draws clients from the Twin Cities’ metro area. We hope to expand this service to additional locations.

Criminal Record Expungement Clinics
In 2018, SMRLS held 5 clinics and served 11 clients, many of whom needed multiple criminal record expungements. This clinic is currently held in St. Paul and draws clients from the Twin Cities’ metro area. We hope to expand this service to additional locations.

Legal Checkup Program
Under a Legal Services Corporation Pro Bono Innovation Fund grant, SMRLS developed a Legal Checkup tool to help screen potential clients for legal issues. Originally designed to be used as part of SMRLS’ Healthcare-Legal Partnership with the Open Door Health Center in Mankato, its use is now expanding to other locations. Volunteer Attorneys meet with clients and use the Checkup program to review a range of legal issues that may affect them. The clients then receive advice to address any of their legal issues, or they are referred to staff attorneys, Volunteer Attorneys, or one of our brief services clinics. This clinic is now offered at five locations in and near Mankato.

SMRLS Has Two Walk-In Advice Clinics
The Power-Up Clinic is a collaboration between SMRLS and the Cardozo Society, and is held in the Selby-Dale neighborhood of St. Paul. Volunteer attorneys from the Cardozo Society and a retired SMRLS staff attorney staff the clinic. In 2018, we held 22 clinics and served 53 clients with a wide variety of legal issues. Many of the clients see the sign outside or are unfamiliar with legal aid and are pleased to have the clinic in their neighborhood.

Ramsey County Housing Court Clinic
This clinic began in July 2018 and served a total of 192 clients last year. The clinic developed from a collaboration between the Ramsey County Court, the Family Housing Fund, SMRLS, Volunteer Lawyers Network, Ramsey County Emergency Assistance, and the Dispute Resolution Center. The clinic runs two mornings each week at the housing court calendar, and is located just outside the court room where the cases are heard. Clients receive legal advice from volunteer attorneys before speaking with their landlord and prior to entering their hearing. After receiving legal advice, clients work with mediators from the Dispute Resolution Center and their landlords to settle their issues.
Lawyers on Ice

Nearly 70 players participated in the 15th annual Lawyers on Ice hockey event on January 8, 2018 at the Xcel Energy Center. Thank you to Robins Kaplan; Western National Insurance; Schwegman, Lundberg & Woessner; Larson King; Gallatin Law Office; Martin & Squires; Stinson; Ogletree Deakins; Meagher Geer; and Morrison Sund for sponsoring the four teams who competed for the traveling trophy. Announcers Bruce Beneke, Paul Peterson, and Judge Daniel O’Fallon provided entertaining banter for the crowd as they cheered on Team 4 to their first-place victory. Special thanks to volunteer referee Matt Anderson and Lawyers on Ice event chair Michael C’Nell (Martin & Squires) for helping raise awareness and critical funds for SMRLS.

Fall Appreciation Luncheon

On November 20, 2018, nearly 400 guests gathered at the InterContinental Riverfront Hotel in Saint Paul for SMRLS’ annual Fall Appreciation Luncheon. Caryn Boisen, President of the Ramsey County Bar Foundation, presented SMRLS CEO Jessie Nicholson, with a check for $24,387.48. This gift is a portion of proceeds from the Ramsey County Bar Association’s annual Bench & Bar Benefit event. SMRLS honored three recent retirees, Gerry Kaluzny, Paul Mundt, and Steve Wolfs, for their decades of service to SMRLS. Former SMRLS Campaign for Legal Aid committee members, Thomas A. Boardman and Jon A. Theobald, received the Award of Appreciation and Lifetime Leadership Award, respectively, for their contributions to SMRLS as volunteers and community partners. John Pollock, Coordinator of the National Coalition for a Civil Right to Counsel, highlighted the luncheon with an engaging presentation about the growing movement advocating for a client’s civil right to counsel.

Social Justice Uncorked

Target Field played host to the 11th annual Social Justice Uncorked fundraiser on June 14, 2018, breaking from the past tradition of this event occurring in September. Guests enjoyed craft beer and wine tastings, upscale fan food, selfies with Twin mascot TC Bear, and participated in a series of raffles and an exciting live auction. Meghan Maes, SMRLS supervising attorney in Mankato, delivered a presentation about SMRLS’ long history of impact litigation in southern Minnesota. Thank you to our sponsors and guests for helping raise a record breaking $183,000 to fund critical legal services for low-income people in southern Minnesota.
# SOUTHERN MINNESOTA REGIONAL LEGAL SERVICES, INC.

## STATEMENTS OF FINANCIAL POSITION

**As of December 31, 2018 and 2017**

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<tr>
<td>Furniture, fixtures and equipment</td>
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<td>Leasehold improvements</td>
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### SOUTHERN MINNESOTA REGIONAL LEGAL SERVICES, INC.

**STATEMENT OF ACTIVITIES**  
For the Year Ended December 31, 2018  
(With Comparative Totals for 2017)

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<tr>
<td>Grants and contracts</td>
<td>$7,365,957</td>
<td>$2,183,796</td>
<td>$9,549,753</td>
<td>$8,470,178</td>
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<tr>
<td>Other support</td>
<td>647,296</td>
<td>521,539</td>
<td>1,168,835</td>
<td>1,241,249</td>
</tr>
<tr>
<td>In-kind contributions</td>
<td>882,036</td>
<td>-</td>
<td>882,036</td>
<td>740,115</td>
</tr>
<tr>
<td>Program fees</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>44,900</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>7,110</td>
<td>-</td>
<td>7,110</td>
<td>8,960</td>
</tr>
<tr>
<td>Investment income</td>
<td>19,236</td>
<td>-</td>
<td>19,236</td>
<td>18,081</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>$2,518,636</td>
<td>(2,518,636)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL SUPPORT AND REVENUE</strong></td>
<td>$11,440,271</td>
<td>186,669</td>
<td>$11,626,970</td>
<td>$10,523,483</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>EXPENSES</strong></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Program services</td>
<td>9,627,986</td>
<td>-</td>
<td>9,627,986</td>
<td>8,941,771</td>
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<tr>
<td>Supporting services</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Management and general</td>
<td>1,245,002</td>
<td>-</td>
<td>1,245,002</td>
<td>927,838</td>
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<tr>
<td>Fundraising</td>
<td>331,260</td>
<td>-</td>
<td>331,260</td>
<td>327,958</td>
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<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td>$11,204,248</td>
<td>-</td>
<td>$11,204,248</td>
<td>$10,197,567</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>CHANGE IN NET ASSETS</strong></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>236,023</td>
<td>186,699</td>
<td>422,722</td>
<td>325,916</td>
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<tr>
<td><strong>NET ASSETS, BEGINNING</strong></td>
<td>$4,099,498</td>
<td>$2,348,830</td>
<td>$6,448,328</td>
<td>$6,122,412</td>
</tr>
</tbody>
</table>

| **NET ASSETS, ENDING** | $4,335,521                                                                       | $2,535,529                   | $6,871,050 | $6,448,328 |
The following firms, organizations and individuals generously provided sponsorship support to one or more of the events in 2018

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