

ATJ Campaign/Fund Local-State¹ Coordination Guidelines

Accepted by the ATJ Campaign Internal Cabinet 8/28/08

1. Coordination Priorities

- A. To build a statewide undesignated endowment so that the earnings can provide a stable source of funding to support the delivery of civil legal aid to the poor on a statewide basis.
- B. To provide support for and coordinate with local campaigns raising funds for operations or endowment for ATJ Fund eligible local civil legal aid offices.

2. Coordination Principles

- A. The ATJ Campaign will be referred to as a partnership of the State Bar of Michigan, Michigan State Bar Foundation and Michigan's civil legal aid programs.
- B. Within the required legal charitable giving framework and the written ATJ Fund policies, all partners will try to avoid competition and support coordination.
- C. Per the ATJ Campaign Goals, partners will work to reduce and coordinate the number of "asks" to law firms for pro bono service and donations.
- D. No partner will ask donors who have designated past ATJ Fund operations or endowment gifts for individual programs to switch those gifts in the future to their/another individual program or to the Statewide Endowment.
- E. Fundraising for the Statewide Endowment will occur in a manner that preserves and supports individual programs with active fundraising efforts as the "face" of legal aid with primary donor relationships in their locales.
- F. Active fundraising through the ATJ Fund for eligible local programs will occur in a manner that acknowledges the ATJ Campaign partnership and Statewide Endowment donor options. Exceptions to this requirement may be requested by an individual program that has a special one-time campaign seeking current donations such as for a new building or unique project.
- G. To maximize the potential for major gifts, fundraising through the ATJ Fund should be flexible and attempt to connect the donor to their particular interests – legacy/endowment gifts, operation dollars, statewide programs of particular interest, etc.

¹ The redesigned ATJ Campaign no longer has a "regional" structure. Instead, it has two components: 1) Statewide Endowment and 2) Individual Program Fundraising (both operations and program-specific endowment).

H. The state level campaign will support individual programs with active local fundraising efforts by providing reports and other information and assistance.

I. Ongoing constructive dialogue will be expected among the partners to identify areas needing improvement or to effect the action steps below.

3. Coordination Procedures

A. "Law firm gifts" are either 1) donations from the firm's individual attorneys with a request that the donations be soft-credited to the firm or 2) gifts of the firm as a corporate entity.² "Law Firm" includes the corporate legal department of a corporation.

B. Lawyers and law firms may continue giving to local and statewide programs as they have in the past. New donors/donations for the firm will be asked to consider supporting the Statewide Endowment but will be offered all options, including local programs and statewide programs. No partner will ask donors who have designated past ATJ Fund operations or endowment gifts for individual programs to switch those gifts in the future to their/another individual program or to the Statewide Endowment.

C. Law firms and lawyers will be told about both participation and dollar goals under the current pro bono standard and how they can meet the pro bono standard, be on COE and achieve other recognition per the ATJ Campaign and pro bono Circle of Excellence donor recognition policies.

D. Law firms already meeting the current pro bono standard will be encouraged to increase their annual donation from \$300 to \$500 per lawyer to achieve a leadership participation level. They will be encouraged to allocate the increased amount to support the Statewide Endowment but will also be advised of the other choices for making ATJ Fund gifts.

E. Joint or coordinated communications and/or visits will be made to targeted firms by Campaign Staff, appropriate volunteers, and representatives from key local programs which have received designated donations from the firm in the past (focusing on 5 to 10 leadership firms from the top 50 firms in the first year). The visitors will be prepared to offer the donors the full range of donation options per the Coordination Principles above.

F. Law firm appeals will be "customized" as needed based on prior firm giving and pro bono service history. This information will be used to determine

² See ATJ Campaign Goals. The initial statewide campaign will focus on the largest 50 law firms. The partners understand that the primary goal of the statewide campaign is to build the statewide endowment.

who should make contacts or "asks," what the "ask" is (e.g. increase gift to \$500, give a corporate gift to Statewide Endowment, increase number of lawyers giving; etc.). While these asks will be customized, the partners recognize that an effective ask may involve only one or two ATJ Fund representatives.³

G. Appeals to firms not currently targeted by the statewide campaign may be made any time by partners provided they are in the program's service area. In approaching these firms, efforts should be made to identify coordination opportunities.

H. At the time of a law firm appeal, notice should be given that while the overall number of law firm "asks" has been reduced and coordinated, a limited number of individual lawyers in the firm may be contacted about major gifts when either the state level or local campaigns identify a person who may have an individual interest in additional support through larger or planned gifts. In addition, lawyers who are part of certain affinity groups may be approached for statewide contributions. When individuals within a targeted firm are identified, the state level and local campaigns will discuss the best approach to each prospect.

I. As described in the above stated policies, targeted firms will be given the opportunity to donate to statewide organizations. In addition, statewide programs may fundraise from individuals who are prior donors and also may approach new donors that are part of relevant affinity groups. These asks should be coordinated with the statewide ATJ Campaign.

J. Programs within the same service area should coordinate their asks with each other and inform the ATJ Campaign of these agreements and plans. At a minimum, the programs should agree on a timeline for direct appeals.

³ Where there is a disagreement among partners as to what ask should be made (or other items which have not been resolved by dialogue, e.g. whose prospect a potential major donor should be), the IC will decide.