

ANNUAL PAI PLAN OUTLINE GUIDELINES

I. MISSION STATEMENT:

Develop a statement that describes the overall Mission of the Branch Office PAI Program. The mission statement should describe how you plan to increase the delivery of effective and cost-efficient legal services for eligible clients through private attorney involvement and collaborative partnerships with the local Bar Association(s).

II. PAI PROGRAM GOALS:

Describe the goals to accomplish the Mission Statement. PAI goals should include, but not limited to: cooperative and collaborative efforts with local bar associations and public service providers, CLE Video Workshops, Community Legal Education Workshops, (live) Seminars, new walk-in and/or pro se legal clinics, and other projects/activities to increase client services and/or pro bono participation.

III. WORK INITIATIVES (OBJECTIVES):

Describe your objectives (a step-by-step process) to accomplish the stated PAI program goals. If there were goals/objectives that were not accomplished last year, indicate how these goals have been incorporated into this year's PAI plan.

IV. VOLUNTEER RECRUITMENT, RETENTION AND PUBLIC RELATIONS:

Describe volunteer recruitment projects/activities that you plan to implement including, but not limited to: attending local bar meetings, mass mailings, creating or continuing the branch office newsletter, paralegal support, co-counseling support, and other recruitment activities to increase volunteer participation. Describe how you plan to use the local news media or other outreach activities to improve PAI's image within your branch office service area. Remember to include recruitment and outreach in the rural counties.

V. PRO BONO RECOGNITION EVENTS:

Describe the Pro Bono Recognition event planned for this year i.e.: annual Pro Bono Award Luncheon/Banquet, Law Day Events and/or other projects that are planned to recognize volunteers for their donated services. Indicate if your event is co-sponsored by the local bar association.

VI. CURRENT PARTNERSHIPS:

List and describe current partnerships established with the local bar association(s) and other public service providers that are used to increase the delivery of legal assistance to eligible clients.

Discuss your plan for establishing a Pro Bono Advisory Board (PBAB) that is reflective of your service area. Remember to clearly identify the role of your advisory board. Members of your advisory board can include a representative from your local bar associations within your service area; pro bono attorneys; law firm representatives, judges, and agency representatives who are actively involved in your local PAI effort and/or who provide assistance to low-income people. It is also important to include the Executive Director, the Branch Office Managing Attorney, and other key stakeholders on the advisory board.

VII. CURRENT LEGAL CLINICS:

List ALL current legal clinic (s) established within the service area, indicate how often the clinics are held, day, and time. Indicate the clinic type: ADVICE ONLY, PRO SE, or COMMUNITY CLINIC. State whether the clinic is a WALK-IN or if AN APPOINTMENT IS NECESSARY.

VIII. RECOURCE DEVELOPMENT ACTIVITIES:

Discuss your fund-raising activities during the past year and indicate the development of potential funding sources for your branch office area, if applicable.

VII. LEVERAGE OF NON-FINANCIAL RESOURCES:

Indicate non-financial (in-kind) donations received last year. Include donor's name, description of in-kind donation, and value of donation. Non-financial donations include: free space to house legal clinics, supplies, equipment, and other items received for the PAI program.

IX. ACCOMPLISHMENTS:

Summarize goals and objectives accomplished last year. If there were goals and objectives that were not achieved last year, indicate why. If applicable, indicate whether or not you plan to carry-over these initiatives in this year's branch office plan. Under this category include:

A. PRIVATE ATTORNEY INVOLVEMENT IN BRANCH OFFICE SERVICE AREA

- ? Number of attorneys eligible to participate in branch office service area.
- ? Number of attorneys that currently participate in the branch office PAI Program.
- ? Number of new attorneys recruited to participate in the PAI program last year.
- ? Number of attorneys that made a monetary donation in lieu of participating in the PAI Program.

B. LAY ADVOCATE INVOLVEMENT IN BRANCH OFFICE SERVICE AREA

- ? Types of lay advocates recruited to participate in the branch office PAI Program.
- ? Number of lay advocates recruited to participate in the PAI Program last year.
- ? Total number of lay advocates that are enrolled to participate in the PAI Program.

C. MARKET VALUE OF VOLUNTEER HOURS

- ? Total number of ATTORNEY volunteer hours last year and the value at \$150 per hour.
- ? Total number of LAY ADVOCATE volunteer hours last year and the value at \$20 per hour.
- ? Grand total of VOLUNTEER HOURS and the VALUE contributed last year.

X. OUTREACH MATERIALS:

Describe the type (s) of outreach materials developed that include but not limited to brochures, flyers, posters, and other information utilized for volunteer recruitment and outreach in the client community.

Kathy D. Duncan, Director
Pro Bono & Bar Relations
PAI Annual Plan Outline Guideline