



investing in justice for all

# Growing Impact

2023 Annual Report

Wisconsin Trust Account Foundation, Inc.



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\* Beginning July 1, 2023  
\*\* Through June 30, 2023

### Staff

*Executive Director*

**Rebecca L. Murray**

*Assistant Executive Director*

**Tehmina Islam**

*Communications and Development Manager*

**Benson Gardner**

*Grants Program Manager*

**Jeff Brown**

## Chairperson's Message

It is axiomatic that, regardless of how partisan or expensive judicial campaigns become, justice should not be for sale. Similarly, justice should not be available only to those who can pay for it. That is, people who have civil legal claims to the justice that only our courts can provide should be able to obtain that justice even if they cannot afford the legal assistance necessary to do so.

That's where WisTAF comes in — to help secure and disburse funds to the various entities, large and small, that provide civil legal assistance to low income people around the state. And, thanks to those providers of civil legal assistance, people are able to obtain safety, housing, and health care for themselves and their families, to find and keep jobs, to attain physical and economic independence and security. In 2023, as detailed in this report, WisTAF administered more than \$7.4 million so that people of limited means could access justice.

And, as also detailed in this report, an economic impacts study commissioned by WisTAF has documented that that investment in justice yields at least an 8.4-to-1 return. The economic impacts documented by that study not only generate even greater economic benefits that cannot as readily be quantified, but the civil legal assistance provided acts as a catalyst that makes other programs more effective. In short, civil legal assistance helps individuals, communities, and our state thrive and prosper.

It is on such a high note that I am fortunate to end my term as chairperson. I have been privileged to serve on the WisTAF Board for 8 of the 12 years that I have been an appellate judge. In that time, my fellow Board members and WisTAF staff have worked diligently and without drama or acclaim to strengthen WisTAF, expand its reach, increase its stature, and, in doing so, to enable an increasing number of grantees to do the daily, demanding, and satisfying work to provide the civil legal assistance that so many people need to obtain justice.

Of course, the unmet need for civil legal assistance remains substantial. But, with the support of our Supreme Court, the State Bar, our legislature, and executive agencies, and together with other civil legal assistance stakeholders, I am confident that WisTAF will continue to help shrink that gap by investing in justice for all.

Judge JoAnne Kloppenburg, *Chairperson*





# Executive Director's Message

The last time I watched the Green Bay Packers play at Lambeau Field, I looked around the crowded stadium and recalled some statistics I had calculated to help people visualize Wisconsin's unmet need for civil legal aid.

In considering the universe of WisTAF-funded legal aid providers, there is roughly one attorney for every 4,300 people in Wisconsin with incomes below 125% of the federal poverty level. In other words, if you filled Lambeau Field to its capacity, you'd have 18 lawyers to serve them all. If those lawyers met with each person for just 60 minutes, it would take them more than six months, working around the clock, seven days a week to meet with everyone. What's more, Lambeau Field's seating capacity could accommodate a mere 10% of Wisconsinites who are income-eligible for WisTAF-funded legal aid.

Access to expert legal information, advice, and representation is severely lacking for those with limited incomes. Millions of people nationwide are effectively excluded from this nation's promise of liberty and justice for all. Unsolved legal problems threaten to perpetuate the poverty cycle and risk of dependency.

Thankfully, civil legal aid gives us a solid game plan. Tackling the unmet needs problem requires investing in a variety of approaches including:

- Increasing the number of attorneys and other legal professionals to handle cases.
- Creating and applying innovative and accessible technology tools.
- Identifying opportunities to simplify processes.
- Expanding the availability of quality self-help information.

Investing in legal aid helps people solve their legal problems and yields an impressive return, as noted in our recent economic impact study results.

Legendary coach Vince Lombardi wisely observed "the best game plan in the world never blocked or tackled anybody" – succeeding at your intentions all comes down to your team on the field. Thankfully, we've got an impressive team of grantees providing quality legal services and executing plans to expand access to justice throughout the state. In 2023, 29 grant recipients used a variety of synergistic strategies to solve clients' complex legal problems and improve courtroom efficiency.

As ever, I am truly humbled by Wisconsin's civil legal aid stakeholder team. We invite all who desire fair and efficient access to justice to champion our efforts and support our work.

Rebecca L. Murray, *Executive Director*

"Heather" from northwestern Wisconsin felt she was **"in hell ... humiliated in court.... uncomfortable and unheard."** She had depleted her savings in years of court battles with the father of her twins.

When Indianhead Community Action Agency took her case through a WisTAF-managed grant program, **"I took the first calm breath of relief I've had in a long time. My attorney was there for me and actually listened to me. I understood that this didn't mean I would get everything my way. But, it did mean that I wasn't alone anymore."** That was all I needed."



## 2023 Impact

In 2023, the Wisconsin Trust Account Foundation (WisTAF) administered grants that allowed **more than 15,000 people**, spread across every county in Wisconsin, to access justice in matters of civil law. **\$9.6 million** went toward assisting these clients as well as building capacity for the coming years. All over Wisconsin, people found the ability to secure their family's safety through restraining orders, avoid wrongfully losing their homes or jobs, protect their health or veterans' benefits, and address a myriad of other serious concerns.

If "justice" is to be meaningful, everyone needs a chance to pursue it. What's more, WisTAF funds play a role beyond what the numbers suggest, because of flexibility that makes it easier for both WisTAF and our funded providers to direct resources where people need it most.



"Tamara" was a **law-abiding citizen who wanted a job**. Little did she know **her identity had been used as an alias** by a family member engaged in criminal activity. When Tamara was denied an interview due to her "criminal record," a Legal Action of Wisconsin attorney investigated, found the truth, and helped Tamara submit a form and fingerprints to the Department of Justice. The department verified the identity theft and removed the misinformation, leaving Tamara's record free, clear, and accurate.



# About Wisconsin Trust Account Foundation, Inc.

**What good are laws in protecting your rights and liberties if you can't afford a lawyer? There's no constitutional guarantee to an attorney in most civil cases — cases outside of criminal law.**

And yet, civil law addresses situations that stand in the way of achieving personal safety, security, and independence. In a complex system like ours, without an attorney it can be hard to know when the law is on your side, let alone how to argue your case or follow procedures to ensure your protection. Too often, people with limited means are shut out of meaningful participation in Wisconsin's legal system.

WisTAF exists to address this issue. A 501(c)(3) nonprofit corporation, we are proud to be the state's civil legal aid funding administrator, established by the Wisconsin Supreme Court.

Since our founding in 1986, we have awarded and overseen more than \$75 million in grants to organizations throughout the state. Our investment helps the most vulnerable residents in every Wisconsin county to access services that open the door to the justice system — including advice and representation from attorneys. With this access, clients can pursue the legal outcomes needed to realize stability, health, and self-sufficiency, in turn benefitting our state as a whole.

## Mission

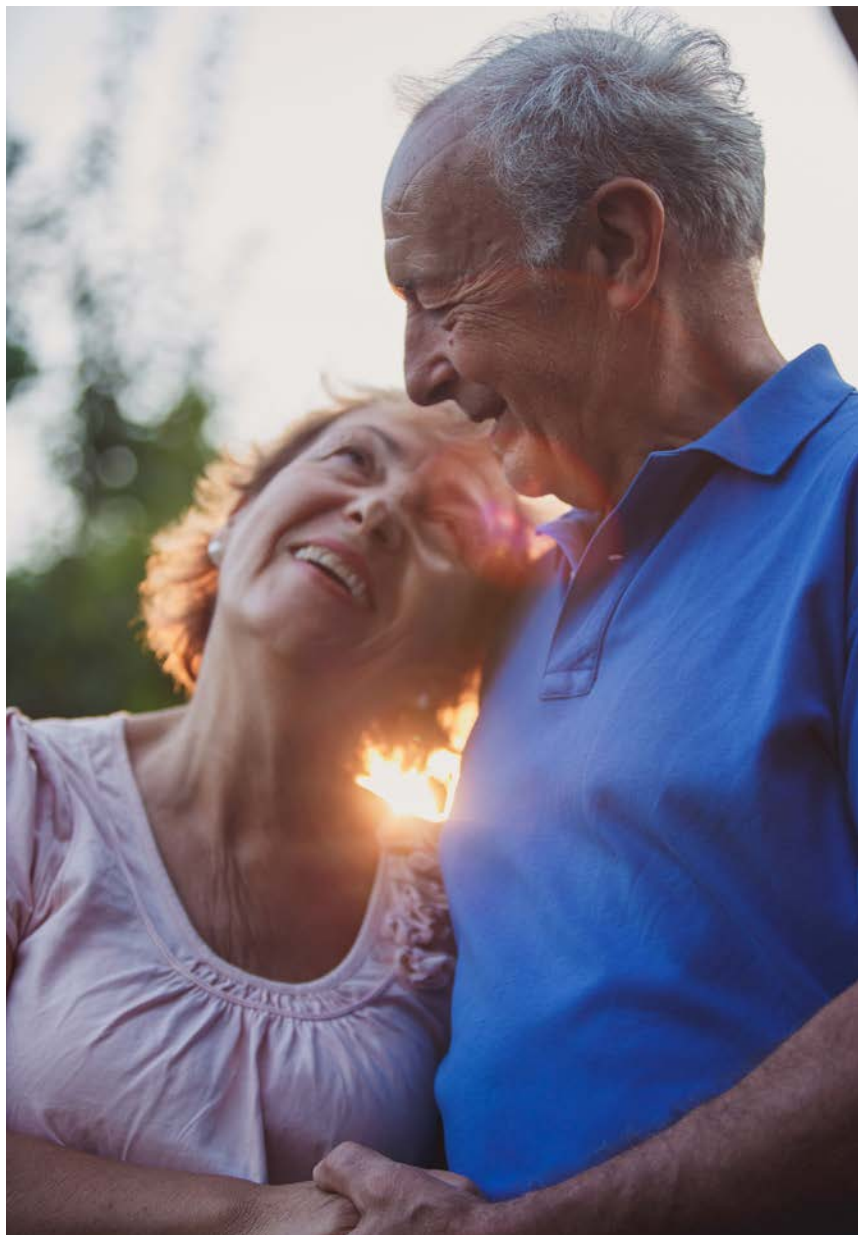
**The Wisconsin Trust Account Foundation works with civil legal aid organizations in Wisconsin to increase access to justice. We oversee funds and invest in services and projects to help people resolve their legal problems.**

## Strategic Direction

Our strategic planning focuses on four priority areas:

- Engage in strategic grant making to fund unmet needs
- Diversify and expand funding sources
- Educate the public and key stakeholders about WisTAF mission and results
- Increase collaboration/coordination among providers and stakeholders in the civil justice system

In 2023, the Board of Directors adopted a revitalized plan for making an impact in these four areas. Staff rely on the plan's nine strategic goals to help guide activities that have led to much of the exciting news in this report, and doubtless in many others to come.



# Partnerships

## Measuring the Economic Impact of Civil Legal Aid

In 2023, WisTAF released *The Economic Impact of Civil Legal Aid in Wisconsin*, a report on research we commissioned in 2022. The civil legal aid provider community served as indispensable partners to the researchers in gathering and analyzing data.

We shared the results with the legal community, philanthropists, lawmakers, the media, and other audiences. We also provided Wisconsin's civil legal aid organizations with communications materials which they are using to spread the word about the study's findings far and wide.

**Big goals aren't achieved in isolation.**

The message is an important one: **every \$1 invested in civil legal aid in Wisconsin produced an economic impact of \$8.40.** The total economic impact, measured at the participating organizations, through their efforts to assist clients with legal problems, generated \$176 million in combined economic impact, consisting of:

- **\$73 million in direct economic benefits for disadvantaged households.** This includes income streams that individuals and families have a legal right to (e.g., child support, wages, veterans' and unemployment benefits).
- **\$18 million in cost savings for governments, charities, lending institutions, and others through preventing crisis situations.** Early legal interventions conserve vital resources and keep costs down (e.g., law enforcement, shelter, food pantry, and other basic needs services).

- **\$14 million in direct return to health care providers.** Legal solutions which identify and secure rightful health care coverage make it possible for hospitals and clinics to get paid for their services (e.g., Medicare / Medicaid coverage for the care of eligible patients).
- **\$71 million economic multiplier impact for Wisconsin communities** from dollars entering Wisconsin that are spent throughout the state, leading to revenue for businesses, which translates to jobs for Wisconsin workers.

The study results confirm that investing in legal aid boosts the economy. It's an outcome worth noting for funders, policy makers, and others committed to improving Wisconsinites' economic and social well-being, strengthening our communities, and increasing court system efficiency.



## Legal Community

Wisconsin's legal community has a long history of demonstrating a strong sense of responsibility for access to justice — via contributions of both dollars and time. State Bar members contributed over \$900,000 to the Public Interest Legal Services Fund and donated thousands of hours of their time volunteering with WisTAF grantees and local free legal clinics around the state last year.

## State Government

Everyone in Wisconsin reaps a benefit when legal processes are effective and efficient. WisTAF is proud to work with multiple state agencies as part of programs (see pages 9, 12) that invest in civil legal aid to provide access to justice, save future public costs, and achieve other public sector goals.

## IOLTA Participating Financial Institutions

Banking institutions' commitment to the communities they serve is reflected in their participation in the Interest on Lawyers' Trust Accounts (IOLTA) program, which provides funding support for civil legal aid (see page 12). In all, 162 Wisconsin financial institutions maintained IOLTA accounts during 2023. Of these, 138 waive all fees on the accounts so that 100 percent of interest payments help people access justice. You can see the complete list at [wistaf.org](http://wistaf.org).

## Civil Legal Aid Alliance of Wisconsin

WisTAF is proud to serve in leadership roles in the Civil Legal Aid Alliance of Wisconsin (CLAAW), a collaborative effort of more than 20 access-to-justice organizations including many WisTAF grantees, the Wisconsin Access to Justice Commission, and more. WisTAF and the other participating organizations work toward a shared vision of all people capably accessing justice and achieving fair legal outcomes. In January 2023, CLAAW led a collaborative social media campaign tied to National Poverty Awareness Month which spread the message that civil legal aid is essential in reducing poverty.

## Philanthropy

Philanthropic goals related to helping people escape economic disadvantage often benefit from a legal aid component. Civil legal aid attorneys can professionally problem-solve for clients, a population sometimes unintentionally left behind by even the most laudable efforts. WisTAF shares this understanding in relevant networks and venues, additionally offering insight into the field with interested partners.



## Prime Partner Program

Prime Partner financial institutions make their communities stronger by paying interest rates in excess of those required for their IOLTA accounts, as a way to strengthen and invest in their communities. We are happy to have welcomed six new Prime Partners since the beginning of 2023.

Law firms help increase access to justice simply by banking with one of the financial institutions listed here.

### Prime Partners (as of this publication)

\*Joined during 2023 or 2024

Bank Five Nine	Independence State Bank*
Bank of Sun Prairie	Landmark Credit Union*
CIBC	Mound City Bank
Citizens Bank	Peoples State Bank (based in Prairie du Chien)
Citizens Community Federal*	Port Washington State Bank*
Farmers & Merchants Bank	Pyramax Bank*
First Federal Bank of Wisconsin	River Bank
Forte Bank	Signature Bank*
IncredibleBank*	West Pointe Bank

## Wisconsin Law Help

The complex nature of our state's civil legal landscape can make it challenging for people even to determine how and where to obtain assistance. Development is nearing completion on Wisconsin Law Help, a website where Wisconsin residents will get a better understanding of how to address their civil legal needs, including finding a provider if needed. WisTAF is one of the funders involved in this collaborative project (see page 9).

# 2023 Grant Programs

## Direct Legal Services and Legal Aid Advancement Grants

WisTAF’s longest-standing grant program, Direct Legal Services, helps low-income people solve major problems in their lives. Clients ensure safety for themselves and their families, find and keep jobs, attain physical and economic independence, ensure appropriate placement of children, protect their health or veterans’ benefits, and address myriad other serious concerns.

In 2023, responding to current, large amounts of unmet civil legal needs in Wisconsin, combined with WisTAF’s temporarily increased trust account revenue stemming from elevated interest rates, we distributed \$2 million in one-time Legal Aid Advancement grants as a way to strengthen the work of Direct Legal Services grant recipients.

Grants to 17 organizations across Wisconsin provided a range of legal assistance — from information and advice to full representation — to approximately 8,000 clients in 2023.

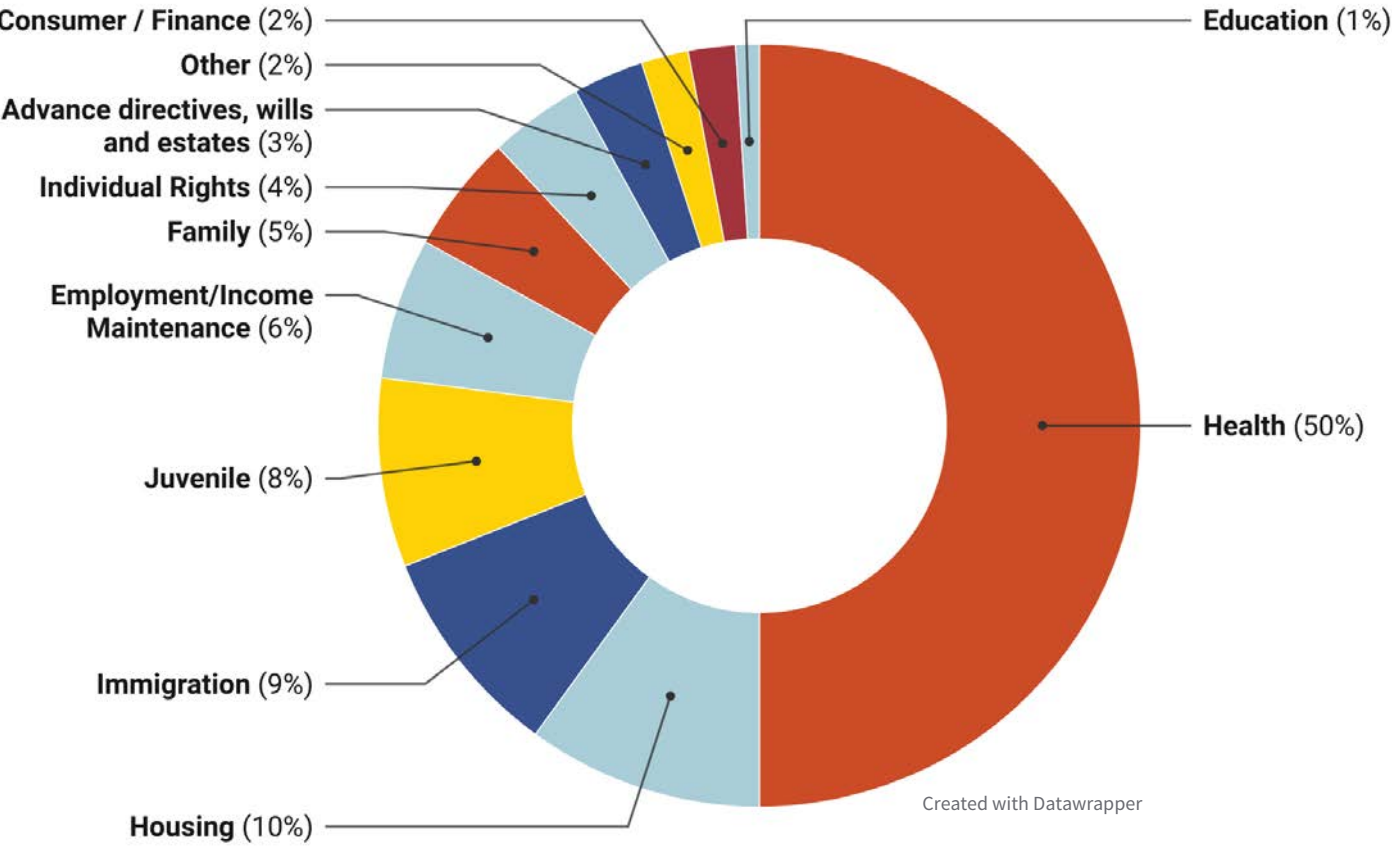
## COVID-19 Legal Services

COVID-19 and its related social effects hit vulnerable people the hardest. Our providers saw, and continue to see, a dramatic increase in legal issues for people in lower income brackets. In 2023, WisTAF continued to administer grants to 13 providers for pandemic-related civil legal services across a host of areas. The grant program is made possible by federal COVID-19 relief funds and served more than 5,000 people last year.

## Wisconsin Help for Homeowners Legal Services

The complexity of our laws and legal processes shouldn’t lock people out of homeownership, a defining feature of middle-class life. WisTAF administers funding for the civil legal aid component of the state effort, Wisconsin Help for Homeowners. WisTAF’s grants allowed more than 700 people in 2023 to participate in the legal system in support of keeping their homes.

**Clients Served by Legal Area**  
(Direct Legal Services & Legal Aid Advancement Grants, 2023)





## Afghan and Ukrainian Immigration-related Legal Assistance

Wisconsin has a long history of embodying America's dream to offer immigrants a safe place to, in the words of Emma Lazarus from the base of the Statue of Liberty, "breathe free." People evacuating from crisis in another country must take certain legal steps to remain in the United States. This complicated, time-consuming process is a challenge for anyone without a law degree, especially someone for whom English is a second language. Since 2022, WisTAF has administered federal funds empowering clients fleeing crisis in Afghanistan to navigate procedures and build a better life. Similar services to people fleeing Ukraine entered an initial planning (application and decision) phase in 2023.

## Domestic Violence and Sexual Abuse Civil Legal Services

More than 1,000 clients addressed critical civil legal problems related to domestic violence and sexual abuse in this program funded by a \$500,000 annual State of Wisconsin allocation of federal Temporary Aid to Needy Families funds. WisTAF made disbursements to 11 legal aid groups and domestic violence shelters around the state during 2023.

## Foreclosure Prevention and Community Redevelopment Legal Assistance

This program aims to catalyze transformational change. Civil legal aid organizations employed innovative strategies while empowering many hundreds of low-income individuals and families to stay in their homes and become economically self-sufficient. At the same time, providers worked at the community level to help groups facing disadvantage to stabilize and revitalize. These grants are funded with a one-time settlement between the U.S. Department of Justice and Bank of America related to claims of mortgage-related fraud leading up to the 2007-2008 financial crisis. With the end of available funds, this program is sunsetting after 2023.

## Wisconsin Law Help

WisTAF is administering a \$124,000 grant which supports the development of the Wisconsin Law Help online portal (see page 7). The grant is funded through a 2022 allocation of federal funds passed through the Wisconsin Department of Children and Families.

Eight-year-old "Mari" lived with her mother and often her maternal grandmother, "Gail." Mari was in the hospital, related to her serious diabetes, when her mother died.

The hospital released Mari to her father, who had rarely seen her but had instead focused on raising her half-siblings. He refused to allow Mari to attend her mother's funeral or speak with her grandmother. He also had no training in her health needs. **Maternal family members were hurt, angry, and had serious concerns about this arrangement.** They showed up in large numbers to the first hearing. The atmosphere was so tense, the judge brought in extra sheriff's deputies, in case of violence in the courtroom.

**An attorney from Kids Matter Inc. worked hard to achieve a positive outcome for Mari and to keep the legal proceedings laser-focused on what was best for her.** Family members had a chance to raise concerns about Mari living with her father. In the end, they left the hearing feeling their concerns were successfully addressed.

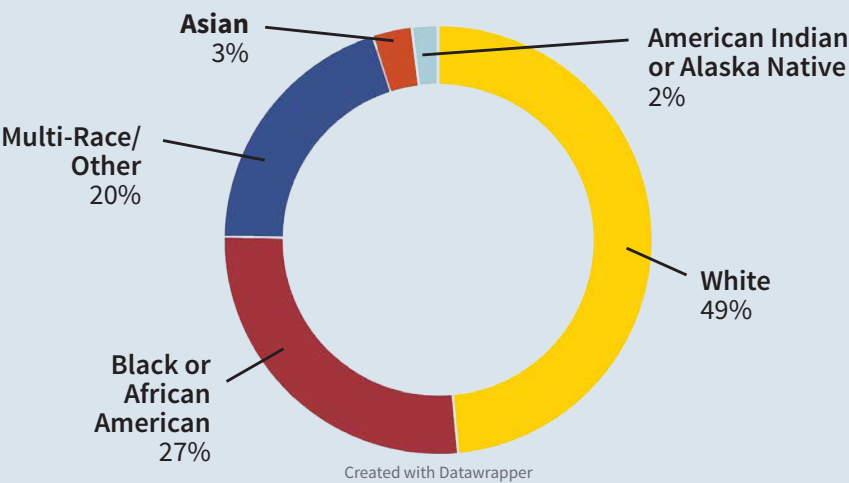
While Gail is too frail to be Mari's caregiver, she now has access to Mari's health app, as well as regular visits. By the end of the hearing, the father even invited Gail to Sunday dinner. The judge credited Kids Matter with a unique ability to help a child's family move **from potential explosion to positive resolution** — in the midst of a high-stakes legal proceeding.



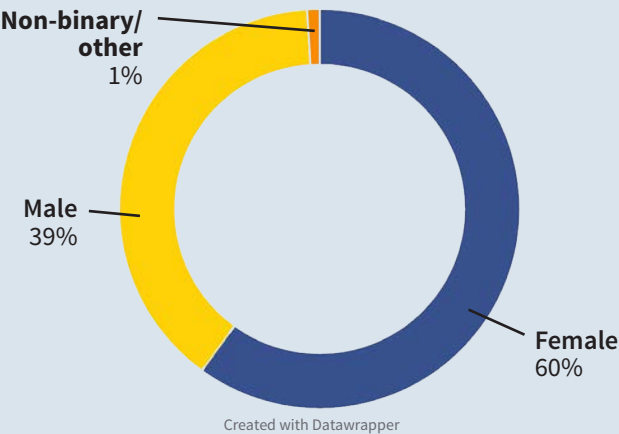
# Demographics

In 2023, WisTAF grants served people from every county in Wisconsin, representing a diversity of races and backgrounds.

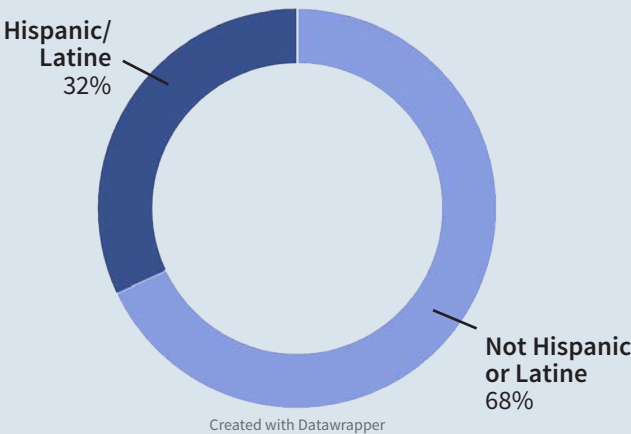
Clients by Racial Identity (All Programs, 2023)



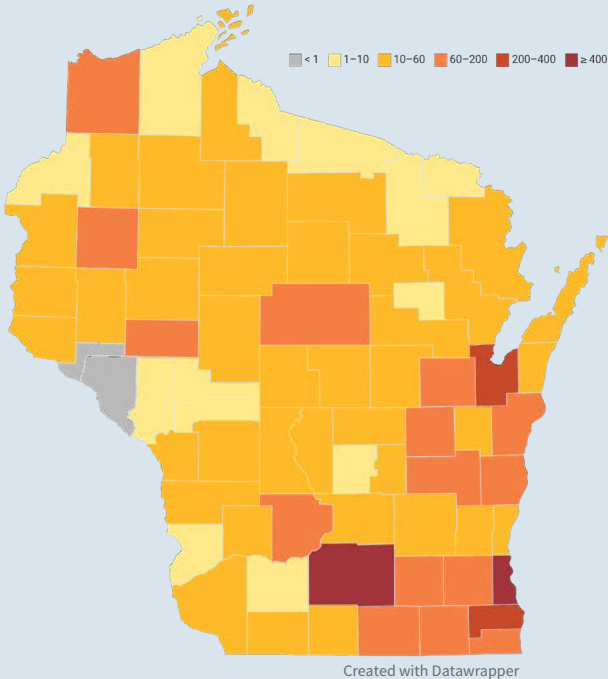
Clients by Gender (All Programs, 2023)



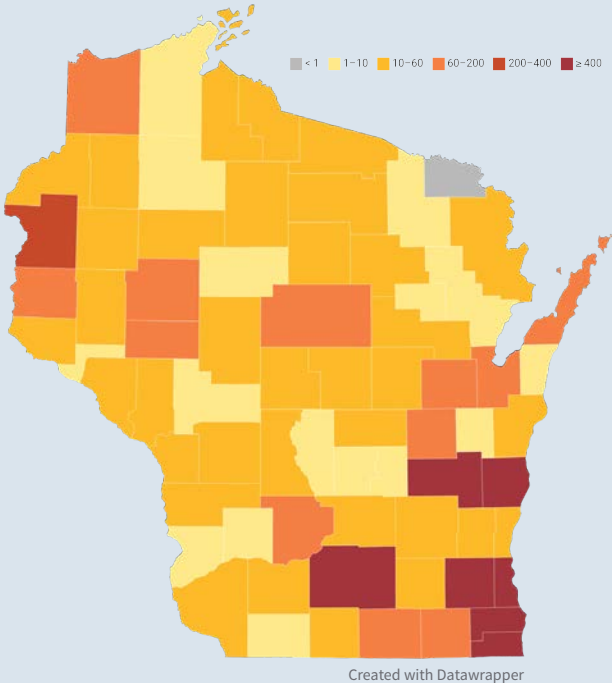
Clients by Ethnicity (All Programs, 2023)



Clients by County (COVID, DVSA, and WHH, 2023)



Services by County (DLS, LAA, and FP/CRLA, 2023)





# Grantees

**WisTAF's 2023 grant recipients continue to use their considerable dedication, skill, and innovation to help and empower the most vulnerable members of our society.**

**ABC (Advocacy and Benefits Counseling) for Health, Inc.** is a nonprofit public interest law firm serving children, families, and other health care consumers throughout Wisconsin on legal issues related to health care access and financing.

**Catholic Charities of the Archdiocese of Milwaukee, Inc.** is a nonprofit charitable organization serving over 13,000 families annually in the areas of Adult, Family & Children, and Social Ministries.

**Catholic Charities of the Diocese of Green Bay** serves people of all faiths in 16 Northeastern Wisconsin counties and is a designated refugee resettlement agency.

**Catholic Charities of the Diocese of La Crosse, Inc.** provides programming in the areas of immigration services, emergency support services, adoption services, financial counseling, domestic abuse services, services for children with disabilities, and ministries including the HIV/AIDS Ministry Project.

Our Lady Queen of Peace Parish (DBA **Catholic Multicultural Center**) is a social service agency on Madison's South Side, running the Immigration Legal Services Program to help low-income and no-income immigrants and refugees who are unable to afford the services of a private attorney.

**Center Against Sexual and Domestic Abuse (CASDA)**, based in Superior, provides supportive services to individuals hurt by domestic violence, sexual assault, or child abuse, while advocating for a community effort to end violence.

**Centro Legal** is a nonprofit legal services firm that helps individuals and families in the Milwaukee area to navigate the legal system in times of crisis. When it comes to civil legal work, Centro Legal specializes in family law.

**Community Immigration Law Center** addresses the unmet legal needs of immigrants in Madison and surrounding areas, and, partnering with **Centro Hispano**, uses a WisTAF grant to work with Afghan evacuees statewide.

**Community Justice, Inc.** is a nonprofit law firm working to close the justice gap in South Central Wisconsin, by offering affordable legal services from qualified and dedicated attorneys to people of modest means. WisTAF funding primarily went to family law work in 2021.

**Disability Rights Wisconsin** is a private, nonprofit organization advancing the

dignity, equality, and self-determination of people with disabilities, and protecting their rights statewide.

**Golden House** is a private, nonprofit agency that provides safety and support for victims of domestic abuse, while leading community efforts to end domestic violence in Brown County.

**HAVEN, Inc. (Household Abuse Victims Emergency Network, Inc.)** is a free community service providing a safe and confidential environment to empower all survivors of domestic violence and sexual assault through sheltering, advocacy, and education.

**Indianhead Community Action Agency** is a private, nonprofit agency that assists individuals in achieving self-sufficiency by providing the resources, education, and services necessary to develop healthy families, sustainable communities, and strong local businesses.

Wisconsin Judicare, Inc. (DBA **Judicare Legal Aid**) provides civil legal assistance, information, and education to low-income people, Native Americans, and others who might otherwise be denied access to justice.

**Kids Matter Inc.** provides legal services and other advocacy for children in foster and kinship care in the greater Milwaukee area.

**Legal Action of Wisconsin, Inc.** serves low-income clients in the areas of family law and domestic violence, housing, public benefits, special education, and economic development.

**Legal Aid Society of Door County** is a volunteer organization that operates primarily as a screening and referral source to coordinate legal services through local pro bono attorneys.

**Legal Aid Society of Milwaukee** provides free civil legal services to qualifying Milwaukee County residents in matters involving eviction defense (Eviction Free MKE), consumer law, estate planning, benefit appeals, community development, and court-appointed Guardians ad Litem.

**LIFT Wisconsin (Legal Interventions for Transforming Wisconsin)**, a project of **Economic Justice Institute, Inc.**, offers technology-driven legal assistance that clears civil legal barriers to economic prosperity for Wisconsin families.

**LOTUS Legal Clinic, Inc.** serves victims of gender-based violence and human trafficking through trauma-informed legal

advocacy, policy initiatives, education, and survivor empowerment.

Metro Milwaukee Mediation Services, Inc. (DBA **Mediate Wisconsin**) assists homeowners and their mortgage services in avoiding preventable foreclosures, and facilitates an informed and respectful transition in those instances where foreclosures are not avoidable.

**The Milwaukee Justice Center** is a collaborative project that taps volunteers to address unmet legal needs. One of the partners, the **Milwaukee Bar Association Foundation**, uses a WisTAF grant to help sustain the work.

**Portage County Legal Aid Society** is a volunteer attorney legal service that addresses the need for pro bono civil legal services for indigent persons in Portage County.

**Rainbow House Domestic Abuse Services** provides prevention, education, and information to communities, families, and schools with the goal of obtaining safety and empowerment for all victims of domestic abuse.

**RISE Law Center**, a project of **End Domestic Abuse Wisconsin**, provides quality, affordable direct legal representation to low income survivors of Domestic Violence & Sexual Abuse, primarily immigrants and refugees with limited English proficiency, in an effort to prevent and eliminate violence in intimate partner relationships.

**Vivent Health** (including former AIDS Resource Center of Wisconsin) is committed to being a respectful, caring partner serving everyone affected by HIV through comprehensive, integrated programs including legal services.

**Winnebago Conflict Resolution Center, Inc.**, a component of Resolution Center, Inc. provides mediation services and training in mediation and conflict resolution statewide.

**The Women's Center** provides safety, shelter, and support to all affected by domestic violence, sexual assault, human trafficking, and child abuse in Waukesha County.

**World Relief Fox Valley** works with immigrants and refugees in the Fox Valley as a designated refugee resettlement agency that is part of World Relief, a decades-old, global, Christian humanitarian organization.

# Financials

WisTAF disbursed more than \$9.6 million in 2023 that helped organizations serve more than 15,000 clients across Wisconsin during the year. Although 2022 and 2023 are the first years in which available resources have surpassed what WisTAF was able to award in 2010, the funding still falls far short of what would be needed to address civil legal needs of Wisconsin families of limited means. It's also important to point out that many of our current fund sources sunset within the next two years.

## Fund Sources

WisTAF grant programs in 2023 drew on the following fund sources.

### Interest on Lawyers' Trust Accounts (IOLTA)

Throughout Wisconsin, when attorneys and firms receive short-term or nominal deposits made on behalf of clients or third parties, they store these in a single, pooled account known as an IOLTA account. The interest generated by these accounts is remitted to WisTAF for use in grantmaking to support civil legal aid. Most participating financial institutions additionally waive fees or provide increased interest as a way to support access to the legal system in their communities.

### Public Interest Legal Services Fund (PILSF)

When the Wisconsin Supreme Court established the Public Interest Legal Services Fund (PILSF), the Court cited its necessity in maintaining "the integrity and efficiency of the judicial system within this state" and "the heightened obligations of lawyers, both to our justice system and to assist this Court with the effective administration of justice." The Fund plays a critical role in supplementing erratic IOLTA funding with a more stable revenue source for civil legal services for low-income Wisconsinites. PILSF funds are directly attributable to the state's attorneys and judges, and are distributed throughout Wisconsin.

### State Appropriations of Federal Funds

#### *Temporary Aid for Needy Families (TANF)*

For several years, Wisconsin's lawmakers and governor have invested a modest annual amount in federal Temporary Aid for Needy Families (TANF) funding for a WisTAF-administered grant program that provides legal services for survivors of domestic violence and sexual abuse. The support comes through the Wisconsin Department of Children and Families.

#### *American Rescue Plan Act – State and Local Fiscal Recovery Funds (ARPA – SLFRF)*

After advocacy from WisTAF and our civil legal aid partners, Gov. Tony Evers used this flexible COVID-19 relief funding to make a significant, one-time-only investment in civil legal aid for COVID-related issues, and a lesser allocation to support the development of the Wisconsin Law Help portal. WisTAF was chosen to administer both grants under the auspices of the Wisconsin Department of Children and Families. Funding covers services provided through June 2025.

#### *American Rescue Plan Act – Homeowner Assistance Fund (ARPA – HAF)*

This distinct COVID-19 relief fund allowed the State to create the limited-term Wisconsin Help for Homeowners program, for which WisTAF administers the Legal Services program. We successfully advocated for an increase in this program in 2023. The Wisconsin Community Action Program Association

manages the overall project under the auspices of the Wisconsin Department of Administration.

#### *Afghanistan Supplemental Appropriations Act (ASA)*

In 2022, the U.S. Congress provided a one-time allocation to help Afghan evacuees in Wisconsin secure their safety and stability by addressing related legal tangles. The Wisconsin Department of Children and Families tapped WisTAF to administer the program. In 2023, the Department opted to provide a second allocation and extended the deadline for providing assistance through June 2025.

#### *Additional Ukraine Supplemental Appropriations Act (AUSAA)*

Among the purposes of this 2022 federal appropriation is to offer support to people displaced from Ukraine to the United States. Late in 2023, the Wisconsin Department of Children and Families looked to WisTAF to begin managing a modest allocation for civil legal services grants for this purpose. Funding covers services provided through June 2025.

### U.S. Dept. of Justice settlement with Bank of America

A 2014 United States Department of Justice settlement with Bank of America provided IOLTA programs nationwide with one-time funds for foreclosure prevention and community redevelopment legal assistance. In 2023, WisTAF made the final distributions from this fund source.

### *Pro hac vice*

By order of the Wisconsin Supreme Court, a portion of the *pro hac vice* admission fees paid by nonresident lawyers to participate in a particular action in Wisconsin is allocated to WisTAF to help support civil legal services for low-income persons.

### *Cy pres*

Wisconsin statutes require that WisTAF receive at least half of any residual funds left over from class action lawsuits filed in Wisconsin state court, in order to provide civil legal aid. Such residuals are referred to by the name of the applicable legal doctrine, *cy pres*. In addition, parties may name WisTAF as the recipient of other residuals, such as federal class actions, restitution, settlements, or penalties.

### Private contributions

WisTAF is grateful to the individuals, foundations, and other entities that contribute to our work to provide access to justice in Wisconsin.



## Statement of Financial Position

ASSETS	2023*	2022*
Cash .....	\$2,749,226	\$1,939,403
Accounts receivable .....	845,009	493,400
Prepaid expenses .....	30,750	15,645
Investments .....	1,711,592	1,499,281
Right-of-use asset, net .....	0	32,210
Total assets .....	<u>\$5,336,577</u>	<u>\$3,979,939</u>

LIABILITIES		
Accounts payable .....	\$10,314	\$4,938
Grants payable .....	239,573	326,653
Lease liability .....	0	32,402
Accrued expenses .....	15,270	11,957
Total liabilities .....	265,157	375,950
Net Assets (unrestricted) .....	5,071,420	3,603,989
Total liabilities and net assets .....	<u>\$5,336,577</u>	<u>\$3,979,939</u>

## Statement of Activities

REVENUE		
Trust account interest income (IOLTA) .....	\$4,278,020	\$908,767
Public Interest Legal Services Fund (PILSF) .....	912,900	908,450
Grant revenue .....	5,296,510	1,819,777
Cy pres awards .....	163,966	41,017
Pro hac vice fees .....	87,200	85,100
Investment return .....	349,897	(172,713)
Other .....	16,419	278
Total revenue .....	<u>\$11,104,912</u>	<u>\$3,950,676</u>

EXPENSES		
Program services (grant awards program) .....	\$9,337,861	\$4,385,056
Supporting activities .....	299,620	327,991
Total expenses .....	9,637,481	4,713,047
Change in net assets without donor restrictions .....	1,467,431	(1,122,371)
Net assets – beginning of year .....	3,603,989	4,726,360
Net assets – end of year .....	<u>\$5,071,420</u>	<u>\$3,603,989</u>

*\*Figures for 2023 are unaudited; 2022 figures are audited. Audit is available upon request.*

Portfolio of Grants Disbursed During 2023 <i>(Cash Basis)</i>		Grant program and fund source											TOTAL 2023
		Direct Legal Services				Legal Aid Advancement	COVID-19 Legal Services	Wisconsin Law Help Portal	Wisconsin Help for Homeowners Legal Services	Afghan Immigration Related Legal Assistance	Domestic Violence and Sexual Abuse Civil Legal Services	Foreclosure Prevention / Community Redevelopment Legal Assistance	
		PILSF	Cy pres	Pro hac vice	IOLTA	ARPA State and Local Fiscal Recovery Funds		ARPA Homeowners Assistance Fund	Afghanistan Supplemental Appropriations Act	TANF Reimbursements, paid 2023	U.S. Dept. of Justice settlement with Bank of America		
Grantee	Area served												
ABC for Health	Statewide	\$69,300	\$0	\$0	\$0	\$86,500	\$194,468	\$0	\$0	\$0	\$0	\$0	\$350,268
Catholic Charities of the Archdiocese of Milwaukee	10 counties in southeastern Wisconsin	\$23,100	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$193,956	\$0	\$0	\$217,056
Catholic Charities of the Diocese of Green Bay	16 counties in northeastern Wisconsin	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$79,459	\$0	\$0	\$79,459
Catholic Charities of the Diocese of La Crosse	19 counties in western, southwestern, and central Wisconsin	\$16,500	\$0	\$0	\$0	\$17,800	\$0	\$0	\$0	\$0	\$0	\$0	\$34,300
Catholic Multicultural Center	11 counties in southcentral Wisconsin	\$11,550	\$0	\$0	\$0	\$12,500	\$44,080	\$0	\$0	\$0	\$0	\$0	\$68,130
Center Against Sexual & Domestic Abuse (CASDA)	Ashland, Bayfield, and Douglas counties	\$28,380	\$0	\$0	\$0	\$14,780	\$38,260	\$0	\$0	\$0	\$47,215	\$0	\$128,635
Centro Legal	Milwaukee and Waukesha counties	\$38,500	\$0	\$0	\$0	\$48,600	\$32,658	\$0	\$0	\$0	\$66,053	\$0	\$185,811
Community Immigration Law Center/Centro Hispano, Inc.	Madison area, limited services statewide	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,592	\$0	\$0	\$2,592
Community Justice, Inc.	14 counties in southern and southwestern Wisconsin	\$20,790	\$0	\$0	\$0	\$24,900	\$0	\$0	\$0	\$0	\$6,545		\$52,235
Disability Rights Wisconsin	Statewide	\$135,000	\$0	\$0	\$0	\$162,200	\$29,586	\$0	\$0	\$0	\$0	\$0	\$330,632
End Domestic Abuse Wisconsin	Statewide	\$17,325	\$0	\$0	\$0	\$20,500	\$0	\$0	\$0	\$8,388	\$29,114	\$0	\$75,327
Golden House, Inc.	Brown and Kewaunee counties	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$44,073	\$0	\$44,073
Household Abuse Victims Emergency Network (HAVEN, Inc.)	Lincoln County	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$23,402	\$0	\$23,402
Indianhead Community Action Agency	9 counties in northern, northwestern, and northcentral Wisconsin	\$0	\$0	\$0	\$0	\$0	\$7,142	\$0	\$0	\$0	\$51,094	\$0	\$58,236
Judicare Legal Aid	33 counties in northern Wisconsin and 11 federally recognized Native American tribes	\$58,955	\$97,270	\$12,845	\$42,360	\$259,500	\$734,040	\$87,769	\$139,740	\$0	\$81,461	\$181,795	\$1,695,736
Kids Matter Inc.	Milwaukee and Waukesha counties, limited services statewide	\$48,400	\$0	\$0	\$0	\$54,100	\$141,365	\$0	\$0	\$0	\$29,213	\$0	\$273,078
Legal Action of Wisconsin, Inc.	39 counties in southern Wisconsin	\$228,550	\$377,091	\$49,800	\$164,222	\$1,007,000	\$2,039,491	\$0	\$494,980	\$0	\$90,477	\$363,591	\$4,815,202
Legal Aid Society of Door County	Door County	\$12,100	\$0	\$0	\$0	\$17,300	\$0	\$0	\$0	\$0	\$0	\$0	\$29,400
Legal Aid Society of Milwaukee, Inc.	Milwaukee County	\$115,000	\$0	\$0	\$0	\$135,100	\$253,260	\$0	\$0	\$0	\$0	\$129,438	\$632,798
LIFT Wisconsin	Statewide	\$0	\$0	\$0	\$0	\$0	\$82,479	\$0	\$0	\$0	\$0	\$0	\$82,479
LOTUS Legal Clinic, Inc.	Statewide	\$22,000	\$0	\$0	\$0	\$27,000	\$0	\$0	\$0	\$0	\$0	\$0	\$49,000
Mediate Wisconsin	Statewide	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$65,085	\$65,085
Milwaukee Bar Association Foundation	Milwaukee County	\$0	\$0	\$0	\$0	\$0	\$82,500	\$0	\$0	\$0	\$0	\$0	\$82,500
Portage County Legal Aid Society	Portage County	\$38,000	\$0	\$0	\$0	\$48,600	\$0	\$0	\$0	\$0	\$0	\$0	\$86,600
Rainbow House Domestic Abuse Services, Inc.	Marinette, Oconto, and Florence counties	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$17,900	\$0	\$17,900
The Women's Center	Southeastern Wisconsin	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$19,545	\$0	\$19,545
Vivent Health	Statewide	\$25,000	\$0	\$0	\$0	\$27,000	\$0	\$0	\$0	\$0	\$0	\$0	\$52,000
Winnebago Conflict Resolution Center, Inc.	Winnebago County	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$32,541	\$32,541
World Relief Fox Valley	Fox Valley	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$60,541	\$0	\$0	\$60,541
TOTAL		\$908,450	\$474,361	\$62,645	\$206,582	\$1,963,380	\$3,679,329	\$87,769	\$634,720	\$344,935	\$499,547	\$778,995	\$9,640,714





## Our Mission

The Wisconsin Trust Account Foundation works with civil legal aid organizations in Wisconsin to increase access to justice. We oversee funds and invest in services and projects to help people resolve legal problems.



811 East Washington Ave., Suite 400, Madison, WI 53703

phone: 608.257.6845 | toll-free: 877.749.5045

email: [service@wistaf.org](mailto:service@wistaf.org) | [wistaf.org](http://wistaf.org)