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THE NORTH CAROLINA JUSTICE CENTER is the state’s leading research and advocacy organization dedicated to transforming North Carolina’s prosperity into opportunity for all. Our mission is to eliminate poverty in North Carolina by ensuring that every household in the state has access to the resources, services and fair treatment it needs in order to enjoy economic security.

To make opportunity and prosperity for all a reality, we work toward:

- **Jobs** that are safe, pay a living wage, and provide health coverage and other benefits
- **Access to quality and affordable health care**

- **Public education** that opens a world of opportunity to every child
- **Consumer** protections that shield families’ hard-earned assets from abusive practices
- **Housing** that is safe and affordable
- **Public investments** in services and programs that expand and enhance opportunities for economic security

- A fair and stable **revenue** system that adequately funds public investments while fairly distributing tax responsibility
- **Fair treatment** for everyone in North Carolina – regardless of race, ethnicity, or country of origin
The Justice Center’s effectiveness in advocating for North Carolina’s low-income and marginalized communities stems from our unique five-strategy approach, which enables us to attack problems with the most effective tools.

Our interconnected strategies are:

**LITIGATION** – Our experienced attorneys take on high-impact cases that protect and expand the rights of low-income groups and individuals.

**PUBLIC POLICY ADVOCACY** – Our skilled advocates work with government officials and allies to secure laws and policies that improve the lives of low-income families and to oppose policies that would take the state backward.

**RESEARCH** – Our expert analysts assess the social and economic challenges confronting poor families and communities, develop policy recommendations to address those challenges, and publish their findings and proposals in a variety of formats that influence policymakers and educate people across the state.

**COMMUNITY OUTREACH** – Our educators and facilitators build relationships with community groups and leaders, engaging in two-way conversations about needs, challenges, and solutions.

**COMMUNICATIONS** – Our writers and media specialists generate a wealth of content for both new and traditional media in order to inform the public dialogue and influence state policy.

The North Carolina Justice Center works through seven projects that provide in-depth expertise in the major policy areas impacting poor and working North Carolinians:

- Budget & Tax Center
- Workers’ Rights Project
- Education and Law Project
- Consumer Protection and Housing Project
- Health Access Coalition
- Immigrant and Refugee Rights Project
- NC Policy Watch
NORTH CAROLINA WORKING FAMILIES WERE UNDER ASSAULT in 2011. With unemployment at frightening levels and tens of thousands of families struggling, state legislative leaders slashed funding for the services and programs that help North Carolinians through tough times. In addition, state budget cuts did tremendous damage to the public structures upon which North Carolina’s prosperity is built.

Years like this one exemplify the importance of the North Carolina Justice Center and its multi-strategy approach. When legislators misrepresented the effect budget cuts would have on programs and people, the Justice Center’s researchers and policy advocates told the true story, and our communications specialists made sure everyone heard it. As legislators targeted health services for cuts, Justice Center community educators were out sharing information and collecting stories of how these services improve North Carolinians’ quality of life. And while state legislators turned their backs on struggling families, Justice Center litigators were fighting to protect workers, consumers and immigrants from abuse and to help families keep their homes.

These battles will continue—and possibly escalate—in 2012. The Justice Center brings a diverse array of tools and talents to the effort to protect North Carolina’s working families. But your assistance is vital. The Justice Center relies on private funding—the organization receives no public money—and some of its most significant funding sources have suffered in recent years.

Join us in the effort to stop North Carolina’s backward slide and to restore the promise of opportunity and prosperity for all.

Sincerely,

Christopher T. Graebe
Co-Chair, Board of Directors

Dhamian Blue
Co-Chair, Board of Directors

North Carolina Justice Center
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DEAR FRIEND OF THE JUSTICE CENTER,

Even in a difficult year like 2011, the North Carolina Justice Center secured important and impressive victories.

- **We defeated efforts to weaken** the state Earned Income Tax Credit, which benefits more than 800,000 working families in North Carolina.

- **We successfully worked with partners to pass** a new school discipline law that does away with the “zero tolerance” approach, which had forced thousands of minority and low-income students out of public school.

- **We helped to secure improvements** to North Carolina’s annexation laws that will benefit low-income and minority communities and new protections for homeowners from homeowners’ associations.

- **We recovered thousands of dollars in back wages** for workers who were victims of wage theft.

- **We protected people from deportation**, including individuals and families who would have faced severe abuse and even death if they were forced to return to their homelands.

- **We launched a new campaign to educate** caregivers and elderly North Carolinians about health care reform and engage them in advocacy for better care.

We will continue to fight for fairness and opportunity for North Carolina’s working families in 2012—regardless of the opposition we face—and, with the help of partners in every community in the state, we will continue to achieve major victories.

Thank you for your support of the North Carolina Justice Center. We are honored and thankful to have so many committed people join us in the effort to secure economic and social justice for everyone in North Carolina.

*Melinda Lawrence*

*Executive Director*
The Workers’ Rights Project strives to enforce and expand policies that ensure safe workplaces, fair treatment, a living wage, and a strong safety net in times of hardship. We also seek to improve the well-being of working families and enable workers to access economic security.

**OUR GOALS:**
- Secure and enforce laws that **protect workers from abuses** on the job, including wage violations, discrimination, barriers to collective bargaining, and unsafe conditions.
- **Empower all workers** to effectively advocate for their rights in the workplace and in the legislature.
- Secure public policies that **improve the economic security** of North Carolina’s working families and help those families maintain financial stability during difficult economic times, including periods of unemployment.
- Ensure North Carolina workers have access to the training they need to **qualify for quality jobs** that pay a living wage and offer upward mobility.
- Support programs that seek to **achieve the safe and successful reintegration** into society of individuals with criminal convictions and promote policies that remove barriers to productive citizenship.

**OUR SUCCESSES**
- **Stopped attacks on unemployment insurance benefits for North Carolina workers facing long-term joblessness.** State legislators blocked an extension of unemployment benefits (even though those benefits were to be fully paid with federal funds), effectively holding long-term unemployed workers hostage in a battle to gain political advantage in the state budgeting process. We documented the struggles of North Carolinians who lost benefits, creating public sympathy for workers and public frustration with legislators. This widespread outrage enabled the governor to take unilateral action to extend the unemployment benefits.
Recovered thousands of dollars for immigrant workers who were victims of discrimination and unlawful withholdings. We successfully resolved class-action lawsuits against seafood companies that brought workers from Mexico on H2-B visas but did not pay them fairly. We obtained back pay for approximately 200 workers and required one employer who had discriminated against female workers to adopt a non-discrimination policy with mandatory reporting requirements.

Changed public policies that prevented people with criminal convictions from working and reintegrating into society. Thanks in large part to our advocacy and the help of our partners in the NC Second Chance Alliance, North Carolina now has three new laws facilitating re-entry into society by individuals with criminal convictions who have completed their sentences. One law lets a person convicted of a low-level felony or misdemeanor petition the court for relief from “collateral consequences,” such as being barred from certain jobs. Another law improves the state’s probation and post-release supervision system by increasing supervision and adding funding for substance abuse services. The third law allows an individual convicted of a non-violent crime when under age 18 to have the conviction expunged.
ABOVE: An ex-offender speaks at a news conference at the NC General Assembly on the barriers to success that people with criminal records face.
Improving conditions for and the well-being of migrant farmworkers. We worked with the Farmworker Advocacy Network on a “Harvest of Dignity” campaign to reform the working and housing conditions of farmworkers in North Carolina. That campaign continues into 2012, as do our regular visits to migrant worker camps. We visited 70 migrant camps and advised more than 700 workers of their rights. In addition, we provided legal representation to dozens of migrant workers whose rights had been violated.

Creating new “Ban the Box” policies in communities throughout North Carolina. Most employment applications require workers to check a box if they have ever been convicted of a felony, and many former offenders find it almost impossible to get a job because of that box. In coordination with our partners in the Second Chance Alliance, we convinced Durham County to stop using the box on its job applications. The county will still perform background checks of potential employees, but removal of the box gives a former offender the chance to get a foot in the door. We continue to support “Ban the Box” campaigns across the state.

Empowering workers with information about their rights in the workplace. We developed materials for and conducted Know Your Rights trainings for workers around the state. These trainings provide an overview of employment and wage laws and inform workers about the rights they do not yet have – like the right to paid sick leave, paid maternity/paternity leave, or protections from caregiver discrimination. We invite participants to become engaged in the campaign to secure paid sick days and family leave insurance for all North Carolina workers.

Securing policies and programs that help workers balance the demands of work and family. Paid sick leave, family leave insurance, flexible work schedules, and protections against caregiver discrimination all provide essential job protection for workers while they care for their own health and the health of their loved ones.

Fighting wage theft. Our research found that in fiscal year 2011, North Carolina workers lost nearly $5 million through documented wage theft, which occurs when an employer does not pay a worker for hours worked. We are partnering with the University of North Carolina School of Law’s Human Rights Policy Clinic to conduct and publish research on the impact of wage theft on workers, their families, and their communities.

To build support for these policies, we published a comprehensive report on the importance of policies that promote work-family balance, especially for low-income workers. We organized a coalition of more than 30 organizations, NC Families Care, that will continue to advocate for family-supportive work policies in the coming year.
The Education and Law Project is committed to ensuring that every child in the state gets a quality education. Our work focuses on ensuring that poor and minority students receive the sound education that the North Carolina Constitution promises.

OUR GOALS:
- Secure adequate state funding for public education so schools have the resources to provide a quality education to every child, including those who are disadvantaged, have special needs, or live in historically underserved rural areas.
- Ensure that state and local suspension and expulsion policies are fair and do not discriminate against minority students.
- Create and support effective dropout-prevention programs so every child graduates with the skills needed to succeed in the global economy.
- Empower parents with information about education law and policies so they are able to have meaningful involvement in their children’s educations.
- Ensure fair and meaningful access to school personnel and services for parents and students who speak English as a second language.
- Advocate for integrated schools that provide expanded opportunities and enhanced educational outcomes for all students.
- Advocate for policies and budget decisions that will lead to the end of the racial achievement gap in North Carolina’s public schools.

OUR SUCCESSES
- Secured a new school discipline law. This law put an end to the “zero tolerance” policies that have robbed many minority students of the opportunity to get an education. No longer will students be forced to leave school for a long-term suspension without a hearing, and there will be no more one-size-fits-all punishments for specific offenses, except when federal firearms law is involved. We drafted and shepherded this legislation through the NC General Assembly with the help of other education advocates and representatives of North Carolina’s school boards, school administrators and teachers’ organization.

- Defeated efforts to privatize public education. We helped stop plans to take tens of millions of dollars away from the state’s traditional public schools and give that money to largely unregulated charter schools, and we ensured that a bill to create a massive school voucher program for private schools never got off the ground.

- Protected education funds designated for low-income and disadvantaged students. Despite the state’s budget woes, we helped to prevent deep cuts to

ONGOING EFFORTS
- Protecting North Carolina’s pre-kindergarten programs. We participated in litigation to stop dramatic cuts to the state’s nationally recognized education program for at-risk four-year olds. The judge ruled in favor of North Carolina’s children, and the governor issued an executive order to ensure the ruling would be followed, but the effort to secure funding so every eligible child can participate continues.

- Preventing the resegregation of Wake County schools. We worked with allies to file and support the investigation of a complaint to the U.S. Department of Justice challenging Wake County’s proposed abandonment of its diversity policy and the district’s disproportional use of suspensions for black students. We also co-authored a report detailing the flaws in the district’s new “controlled choice” school assignment plan.

- Protecting the right of all students to attend public school. We provided direct assistance to families that had difficulty registering their students for school, and we created a guide
designed to empower parents by walking them through the requirements for enrolling students.

- **Stopped the repeal of the Personal Education Plan statute.** Personal Education Plans are a vital resource for students who are at risk of failure in school. The legislature eliminated these plans in the state budget, but we ensured that the right to a plan was restored through the technical corrections process.

- **Educated the public about federal, state, and local education policy developments.** Through the use of blogs, Twitter, news releases, and opinion pieces in newspapers, we shed light on key education policy developments, such as the new federal guidelines on the use of race in student assignment, the limitations on use of federal free-and-reduced-lunch data, the impact of proposed changes to the state’s charter-school law, the difficulties of charter-school transportation, and key local issues such as the increased cost of transportation under Wake County’s proposed student assignment plan.

- **Advocated for higher teacher pay.** In response to attacks on teachers that have become far too common, we authored blog posts and published opinion pieces chronicling the need for increased teacher pay that reflects the importance of the work teachers do.

several funds that provide supplemental money to schools for the education of students who are low-income, have special needs, or are at risk of academic failure.

- **Educating the public about the diversion of lottery money away from schools.** We published a report exposing how state legislators are using lottery money to replace, rather than supplement, state funding for schools.

- **Securing a quality education for English Language Learners.** We authored a report and made presentations to parents and educators on the need for improved services for students whose first language is not English.

- **Empowering parents to fight for their children’s education rights.** We conducted numerous trainings for parents and community leaders on how to become education advocates.
The Consumer Protections and Housing Project is dedicated to protecting North Carolinians from harmful and abusive business practices and to improving housing conditions for low-income people.

OUR GOALS:
- Create an adequate supply of safe, decent, and affordable housing.
- Reduce the loss of homes from foreclosures and unfair practices.
- Increase, maintain and enforce protections and rights for tenants.
- Create affordable access to utility, transportation, and other services such as sewer systems and broadband internet.
- End predatory mortgage lending and abusive loan-servicing practices in North Carolina.
- Ensure protections are in place to prevent abuses by companies involved in small-loan consumer lending, and prevent payday lenders from returning to North Carolina.
- Protect low-income families and communities from unscrupulous and exploitative business practices.

OUR SUCCESSES

► Defeated bills that would have weakened homeowners’ rights and protections. We were instrumental in getting the Homeowner and Homebuyer Protection Act passed in 2010, and in 2011 we worked hard to defend this important law from numerous attacks. One bill in particular would have gutted the law, which cracks down on “foreclosure rescue” and other scams that target struggling families. But thanks to our efforts, that bill failed.

► Stopped legislation that would have increased interest rates and fees for loans from finance companies. Finance companies have numerous lobbyists in the General Assembly pushing for laws that weaken consumer protections and enable them to make more money on the backs of low-income workers. This year, we teamed up with military personnel – many of these companies target troops stationed at bases in North Carolina – to squash efforts to make finance-company loans more expensive.

► Protected homeowners’ rights in court. Together with our legal services partners we helped provide free legal representation to hundreds of low-income homeowners who were victims of abusive or illegal lending practices.
Victories included saving homes from foreclosure and securing cash settlements for families who had lost their homes to unlawful practices. For example, we obtained the dismissal of a foreclosure against a homeowner whose loan servicer refused to process her mortgage payments and then assessed more than $20,000 in fees. We also recovered monetary settlements for a couple who lost their home because their loan servicer failed to apply their payments to the loan and for borrowers whose mortgage broker misrepresented the terms of the loans he sold them. In addition, we are litigating a class action to stop unlicensed settlement companies from conducting loan closings and to recover damages for their victims.

Educated a variety of audiences about fair housing rights. Working with Legal Aid of North Carolina, we helped create the new NC Fair Housing Project, which is dedicated to fighting housing discrimination throughout the state. A Justice Center staff member serves as the project’s director. We have co-sponsored more than a dozen trainings on fair housing rights, including workshops targeted at Spanish speakers, people with disabilities and their advocates, and housing providers and managers.

Secured new protections and resources for homeowners facing foreclosure. We worked to increase public funding for housing counselors and legal services attorneys helping North Carolinians avoid foreclosure. We also championed new legal protections that improve the rights of homeowners facing foreclosure by their homeowners’ associations.

Improved North Carolina’s annexation laws to better serve low-income and minority communities. We worked with communities and several civil-rights organizations to secure a new law that lowers the barriers to annexation for low-income communities. Now, rather than being excluded by their better-off neighbors, more low-income communities will become part of municipalities that offer much-needed services and utilities.

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Defending important consumer protections from attack. A variety of business interests target consumer protections every year, hoping to change the state’s laws to make it easier for them to rob North Carolina’s working families of their hard-earned assets. However, North Carolina continues to have some of the strongest consumer protections in the country, in part thanks to our vigilant efforts monitoring legislation and legislative committees and informing lawmakers about how proposals to weaken protections will hurt their constituents.

Helping make utility rates affordable for low-income families. While Duke Energy and Progress Energy seek to merge and create the nation’s largest utility, we are advocating aggressively along with partner organizations to make sure the merger is not approved without consideration of the needs of low-income families. We are pushing for weatherization programs to reduce electricity usage, programs to help families replace outdated appliances, protections against unfair shut-off policies, and rate structures that allow low-wealth people to pay reduced rates for electricity without subsidizing the rates of large corporate users. We are also involved in a Duke Power rate case opposing the company’s attempt to increase electricity rates in North Carolina.

Increasing the supply of safe, affordable housing in North Carolina. We will continue to advocate for a dedicated revenue source for the NC Housing Trust Fund, which finances the construction and rehabilitation of affordable housing. We also will continue our efforts to secure more “least restrictive” housing opportunities for people with mental health disabilities. In addition, we will continue our advocacy and research on transportation issues and will work to make sure public transit plans include affordable housing.

Increasing and protecting the rights of tenants. We have undertaken a number of cases to protect and expand tenants’ rights. These include cases dealing with bed-bug infestation, mold, deceptive use of “rent discounts,” and attempts to evict for failure to pay water bills. In addition, we will continue to fight bills that would significantly reduce the rights and protections for tenants that currently exist in state law. This year, that included a bill that would have eliminated minimum housing-code inspection programs by local governments; we secured significant improvements to this legislation in order to protect tenants’ safety. Other bad bills, like one that would make tenants liable for bed-bug infestations, have not passed yet but are still on the legislative table, and we will work to improve or defeat them in the coming year.

Exposing systemic issues that can lead to foreclosure. We have continued our efforts to protect homeowners from foreclosure, including litigation asserting that the federal government’s Home Affordable Modification Program, which is supposed to reduce mortgage payments and lower interest rates for struggling homeowners, has not been implemented effectively. We are currently monitoring the work of a legislative committee tasked with rewriting the state’s banking laws in order to ensure that any changes benefit or do not adversely impact consumers.
In November 2011, the National Consumer Law Center awarded its prestigious Vern Countryman Award to Carlene McNulty, the Justice Center’s director of litigation and staff attorney for more than 15 years, for her work to stop the abuses of payday lending in North Carolina.

The Countryman Award is the top honor for consumer attorneys in the United States. NCLC awards it annually to a public-interest attorney whose special contributions to the practice of consumer law have strengthened and affirmed the rights of low-income Americans.

Carlene is the “go-to” person for lawyers in North Carolina who are struggling with complex consumer law issues. She has successfully defended numerous homeowners from foreclosure and has litigated against mobile-home dealers, unscrupulous mortgage brokers and predatory lenders.

Carlene has been one of the lead attorneys in a series of class-action cases against payday lenders who were using “rent a bank” schemes to evade North Carolina usury law. Last fall, the team of litigators settled three of these cases, recovering a total of $43.75 million for more than 364,000 class members. The settlement with Advance America of $18.75 million is the largest settlement against a single payday lender in the nation.

These landmark settlements earned Carlene and her co-counsel the Public Justice Achievement Award from Public Justice, a national public interest law firm.

Carlene has also been involved in numerous consumer legislative efforts. She helped draft significant consumer protection statutes involving a broad array of issues, including mortgage loan servicing, foreclosure procedures, contract-for-deed transactions, and debt-buyer collections.

Carlene has been a pioneer in dealing with collection abuses by debt buyers who have flooded state courts with collection cases. She has successfully fought debt buyers’ claims in court, and her experience was critical in North Carolina’s enactment of the strongest debt-buyer protection law in the country several years ago. Other state legislatures are now considering passage of bills modeled after North Carolina’s legislation.
The Immigrant and Refugee Rights Project provides free legal advice and representation to low-income immigrants in North Carolina who need help in the areas of immigration law, employment law, housing and consumer protections, or access to public benefits and services. We also provide support for immigrant and refugee organizations throughout the state.

**OUR GOALS:**
- Ensure that low-income immigrants have the legal representation necessary to navigate the complex and onerous immigration system.
- Protect immigrants and their families from abuses in the public and private sectors.
- Advance public policies that improve the well-being of immigrant families and provide them with opportunities for economic security.
- Promote acceptance and understanding of immigrants and immigrant communities in North Carolina.

**OUR SUCCESSES**

► Recovered damages for victims of wage theft. One of our clients was a maintenance man for two Wilmington hotels who worked 60 to 65 hours a week but was paid only for 40 hours. After a year of litigation, we recovered more than $15,000 of back pay he was owed. In addition to numerous individual cases, we are pursuing a class-action case on behalf of more than 850 poultry workers who did not receive pay to which they were entitled when their employer went out of business; we have already received preliminary court approval of a settlement.

► Obtained immigration benefits for more than 120 people. These benefits – including lawful status, work authorization, and protection from deportation – enabled our clients and, in some cases, their families to live and work in North Carolina and contribute to the state’s culture and economy. We secured asylum for a couple from Iran and a family of three from Pakistan who each faced death in their home countries because they had converted to Christianity. Among our other clients was a young Honduran woman whose husband had abused and threatened to kill her; thanks to our efforts, she was granted asylum, and now she and her children are safe. We also obtained asylum for a woman from Afghanistan who, because she worked and lived independently as a single woman in the United States, was accused of living an “immoral” life and was told she would be killed if she returned to her homeland. In addition to representing clients like these at the Asylum Office, we worked in the U.S. Citizenship and Immigration Services, the
Immigration Court, and the Board of Immigration Appeals to get legal status for our clients.

Prevented the deportation of more than 20 detained immigrants. In addition, we created a handbook, printed in English and Spanish, that included important information for people facing detention and possible deportation and for their families. We also created a webinar for immigration advocates and trainers that provided critical information about the detention process and detainees’ rights.

Provided legal representation to juveniles in the immigration system. This year, the Charlotte Immigration Court became one of only a handful of courts nationally to implement a separate court docket for juveniles. In response, we began providing individualized in-person assessments for all juveniles with no legal representation in order to identify meritorious cases to accept or refer to other organizations or private attorneys. We assessed the cases of more than 30 children – ages 10 to 18 – in 2011.

Prevented bills that would hurt North Carolina’s immigrant community from becoming law. Sadly, immigrants are often the target of punitive and discriminatory legislation that, if passed, would undermine safety and opportunity for everyone in North Carolina. This year, with our partners and allies, we helped to stop numerous bills from passing, including a bill that would have instituted Arizona-style racial profiling in North Carolina. In addition, we played a lead role with the Adelante Education Coalition in securing dramatic improvements to a bill that would have forced school officials to require information about immigration status when children enroll in public schools. As part of our advocacy efforts, we planned and implemented simultaneous statewide vigils for education access in Charlotte, Greensboro, Asheville, Raleigh and Greenville.

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Recovering damages for immigrants who are victims of fraud. We are currently litigating a class-action case against a notario who defrauded some 350 immigrants in North Carolina out of hundreds of thousands of dollars in a scheme where he illegally offered to provide legal representation in immigration proceedings.

Supporting immigrant organizations throughout North Carolina. Our attorneys regularly answer questions on the rights of immigrants in regards to education, employment, housing, and public benefits. In addition, we lead and staff the statewide workgroup of advocates and community leaders that coordinates education, advocacy, and strategic action.

Empowering immigrant communities with information about their rights. We planned and facilitated more than 30 workshops and retreats with low-wage workers, immigrant advocates, and community groups in counties throughout North Carolina, including Chatham, Duplin, Forsyth, Guilford, Moore, Nash, Orange, Pitt, Wake, and Wayne counties. At these events we addressed anti-immigrant legislation, immigrant worker layoffs, workers’ rights, housing and consumer law, public benefits, the unjust federal immigration system, and strategies for community organizing.

Promoting respect for immigrants in North Carolina. The Justice Center was a leader in the creation of Uniting NC in 2008, and today we provide leadership and support for this organization dedicated to making North Carolina a place that respects and values immigrants. In 2011, Uniting NC received the Peace Prize from the NC Peace Corps Association and an award for multicultural outreach from AARP North Carolina.

Protecting the rights of immigrants in the court system. We filed a...
complaint with the U.S. Department of Justice, on behalf of three immigrant organizations, charging that the North Carolina court system failed to provide interpreters for individuals with limited English proficiency in civil and some criminal court proceedings. In response to the complaint, the Justice Department launched a vigorous and thorough investigation with which we assisted by identifying witnesses and arranging meetings.
The Health Access Coalition works to expand access to quality, affordable health care for everyone in North Carolina, including people who are low-income, are elderly, or have disabilities.

**OUR GOALS:**

- Expand publicly funded health services for low- and moderate-income families, and make them more accessible by simplifying paperwork and eligibility criteria.

- Secure health-care policies that prioritize the needs and well-being of North Carolina consumers, especially with respect to the implementation of federal health reform.

- Empower health-care consumers—in particular, those who are low-income, uninsured, elderly or have disabilities—with information about their rights, available services, and how they can become effective advocates for the creation of a better, fairer health-care system in North Carolina.

- Provide assistance to individuals trying to access public health programs.

North Carolina’s implementation of the law addresses the needs of low- and moderate-income individuals and families across the state. The reform law leaves many decisions up to the states, and we have taken a lead role in representing consumers in the process by serving on numerous task forces and work groups making recommendations for the implementation of reform.

**OUR SUCCESSES**

- Represented consumers in the state-level implementation of health-care reform. Since the passage of federal health-care reform, our primary focus has been on making sure

ABOVE: Nicole Dozier addresses seniors in Greenville.
RIGHT: The Health Access Coalition and its Campaign for Better Care partners provide information about the benefits of health reform for vulnerable adults at an event in Greenville.

**Justice Center volunteer Polly Williams gives an update on Medicaid to seniors in Rocky Mount as Adam Searing listens.**

**Engaged North Carolinians in the implementation of health reform.** We used intensive media outreach, opinion
Helped to create a new information source for consumers. Federal health-care reform calls on each state to create call centers where consumers can get questions answered. We supported the NC Department of Insurance’s application to host the program, now called SmartNC, and we serve on its community advisory board to make sure the program is meeting the needs of individuals and families. In the coming year, we will work to secure a sustained funding source for SmartNC.

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Fighting the health industry’s efforts to dominate the implementation of health-care reform. One key feature of reform is the establishment of a health benefits exchange in each state. The health benefits exchange is a new marketplace through which many state residents will purchase insurance coverage, compare health plans, seek counseling about insurance options, and enroll in Medicaid. The exchange will also provide additional oversight of the health insurance industry. The way North Carolina structures its exchange will be critical for the success of reform in this state and for making the health insurance system fair and accountable. But during the legislative session, lobbyists for the health-care industry pushed legislation to create an exchange that would be controlled by insurers without adequate input from consumers. We led the fight to defeat this exchange bill. We created one of the largest health advocacy coalitions ever assembled in the state, called Citizens for Responsible Health Care, which maintained a critical media presence, generated thousands of calls and emails to legislators, packed legislative committee hearings, and drove news coverage during the battle over the industry-sponsored bill. With our coalition allies, we convinced the state Senate not to hear the legislation. However, the bill is still eligible to move in 2012, and we are ready to ensure that any exchange legislation helps the everyday people who have struggled for decades against a health care system that favors industry and leaves consumers broke and broken.

Empowering caregivers and elderly North Carolinians to fight for better health care. Even though the passage of health-care reform was critical, it was only the first step in building a better health-care system—there is little benefit to having health insurance if the health care system is not delivering quality care that puts the needs of the patient first. In 2011, we partnered with Community Catalyst and AARP North Carolina to expand a new initiative called the Campaign for Better Care. Through this effort, we organized community events in Greenville, Pittsboro, Rocky Mount, and Wilmington and made presentations to some 400 people on health care, public services, and health-consumer rights. Some of the event attendees were so inspired that they joined AARP on a bus trip to Washington, DC to talk to members of Congress about the importance of a well-functioning health-care system. During the coming year, we will continue our community engagement efforts in order to empower health-care consumers to advocate for their own rights and for public policies that increase accessibility to quality care.

Protecting and expanding funding for public health programs. State legislators made significant cuts to Medicaid this year and...
claimed they would make up the money with the savings from expanding the state’s managed care program – even though countless government and nonprofit officials told them it would not work. It did not work, and now the battle will intensify to ensure that the thousands of North Carolina families who rely on Medicaid and NC Health Choice, the state’s insurance program for children from low-income families, are not left without much-needed health coverage and assistive services.

Setting the record straight on health-care reform. Reform opponents have run a sustained campaign of misinformation. We, along with local and national partners, held educational forums and conducted media outreach in order to get the truth out about the benefits of health-care reform. We posted videos online to highlight individuals’ stories of the benefits of reform and to hold politicians accountable when they misrepresented it. We have established ourselves with the media as an expert source to counter the false claims that are sure to come next year.

Improving the communications efforts of other health organizations around the country. This year we established ourselves as a national leader in the use of video to show the impact of health policy and budget decisions on the lives of low- and moderate-income North Carolinians. After gaining broad experience in the use of video, we wrote and published a handbook for state-based advocates on selecting video equipment, finding stories, and posting videos online. We made a presentation on the handbook at a national meeting of health advocates in Philadelphia, and we traveled to Virginia and South Carolina to help partner organizations in those states use video effectively. We already have plans to do more trainings in 2012 in Mississippi, Texas and other states.
The Budget & Tax Center conducts non-partisan analysis of state budget and tax policy and monitors economic conditions in the state. Our timely and accessible research seeks to contribute effectively to policy discussions and public debate and to build a broader understanding of the role of policy in supporting economic opportunity for all.

- Educate state policymakers and the general public about how state and federal policies affect the ability of low-income and disadvantaged communities to achieve economic security.
- Analyze state investments in public structures, programs and services to determine if they are adequate to promote economic opportunity in North Carolina’s disadvantaged communities.
- Publish detailed analyses of state budget and policy proposals and, when necessary, promote alternatives that can improve the economic security of low-income North Carolinians.
- Ensure the state and federal tax systems are fair in what they require low-income families to pay, are stable despite economic cycles, and raise enough revenue to adequately fund vital public structures.

Our successes

Protected an important tax credit for North Carolina’s working families. We led the 2007 effort to create a state Earned Income Tax Credit, which benefits more than 800,000 working families in North Carolina. This year, we played a central role in stopping a legislative attack that would have dramatically cut back the EITC and taken money out of the pockets of about 428,000 families. We re-engaged our previous EITC partners, developed a “Save EITC” website, and led a postcard campaign that collected more than 400 stories from families receiving the EITC and their neighbors. We published analysis of the EITC’s benefits to the state’s economy and to recipients and testified before legislators. Thanks in large part to our work, the attack on the EITC failed.

Influenced the public debate about the state budget. Our research and communications efforts bolstered public support for taking a balanced approach to the state’s budget shortfall. We worked with our partners in Together NC – a coalition of more than 130 organizations – to craft and promote messages that emphasized the importance of public investments and the economic damage that severe budget cuts would cause. The public embraced our viewpoint, and polling showed that only 23 percent of North Carolinians agreed with the choices made in the final budget. Moreover, prominent state policymakers—including the governor and the House and Senate minority leaders—adopted our messaging.
Held state legislative leaders responsible for the economic damage the budget they crafted will cause. Legislative leaders repeatedly tried to deny that their budget cuts would damage the people and economy of North Carolina. But we produced the data to expose how those cuts would undermine education, workforce development, infrastructure, and perhaps most importantly North Carolina’s already-struggling job market. The resulting public outrage forced legislators to back off from some of the proposed cuts. The final budget was damaging nonetheless, and we made sure the people of North Carolina knew it by publishing and heavily promoting a report that showed the budget would kill some 30,000 jobs in the public and private sectors.

- Improved access to post-secondary education. Our research on workforce development and engagement with the community college system helped to shape plans to reform developmental education in the state. A new pilot project we helped design will provide educational support to adult workers who are not prepared for the demands of community college. Through reports, blog posts and factsheets, we convinced lawmakers to restore some cuts to need-based financial aid for community college students. We also provided advocacy and research support for the governor’s veto of a bill that would have allowed community college campuses to opt out of the federal student loan program.

- Defeated an effort to severely damage North Carolina’s revenue system. The misleadingly named Taxpayer Bill of Rights (TABOR) came before the North Carolina legislature this year and threatened to dramatically undermine the state’s ability to fund its schools, universities, infrastructure and a wide range of human services. We produced a report that demonstrated the impact of the TABOR proposal, organized local community leaders and business leaders in opposition to TABOR, created a webinar and distributed information to partners and allies. We also held meetings with key Council of State members and their staff, legislators, and non-traditional allies and testified against TABOR in a House committee hearing. In the end, the TABOR bill did not make it out of that committee.

(continued on next page)
Making the state revenue system fairer, more stable and more adequate. We released a major report on revenue modernization detailing a plan to fix the state’s outdated, inadequate and unfair revenue system that would also help to close the budget shortfall. We made presentations to partners and community groups on the revenue alternatives in our plan and widely disseminated the report to advocates, local Chambers of Commerce and local leaders.

Fighting for increased public support and more quality jobs for North Carolina’s working families. We published research on effective public options for job creation, and we worked to ensure full implementation of the governor’s Job Boost program. We released an updated version of one of our signature publications, the Living Income Standard, a market-based measure of what it takes for a family to make ends meet in each of the state’s 100 counties. The report also outlined the difficulties created by the prevalence of low-wage jobs in North Carolina and how the state can better support its working families. In addition, we produced the first of what will be an annual publication looking at a variety of challenges facing working families, including caregiving responsibilities, long-term unemployment, and the lack of jobs that pay family-supporting wages.

Educating community leaders and activists about the state budget and its impact on North Carolina’s people and institutions. In addition to publishing nearly 50 reports and briefs, we gave more than 25 presentations to community groups on the state budget, taxes, and funding for vital public institutions and services. We conducted teach-ins and provided state-level data on income inequality for the Occupy movements in Raleigh and Durham and on college campuses. In addition, we have developed innovative ways to inform and engage the public on state budget and tax issues, including several series of infographics that we released and promoted online. One series put budget cuts proposed in the state House budget next to reasonable revenue options in order to illustrate that the cuts could be avoided. Other series tracked economic data on North Carolina’s working families and documented the effect of severe budget cuts on the state’s public structures and communities.

Providing vital technical support to large progressive coalitions in North Carolina. With the Covenant with North Carolina’s Children, we lead Together NC, a coalition of more than 130 member organizations dedicated to protecting public structures and services for the state’s most vulnerable people. We provided timely analysis on budget and tax proposals to Together NC members and developed factsheets and analysis for the coalition’s news events and rallies. In addition, the Justice Center provided considerable communications and design support for Together NC’s media outreach.

Ensuring that corporations in...
North Carolina pay their fair share in state taxes. We continue our work organizing partners and the public against efforts to allow corporations to evade their responsibility to help fund state investments and services. In early 2011, the governor proposed a reduction to the corporate tax rate, and both houses of the legislature proposed to lower it even more. We analyzed the impact of these proposals on the state budget and engaged in extensive media outreach on the issue. Polling showed that our message was having an impact as public support for the corporate tax cut slipped. So, the legislature abandoned the rate cut and instead passed a rule change that severely limited the Department of Revenue’s ability to go after corporate tax dodgers. The rule change is set to be studied in 2012, and we will be ready to provide data and engage our partners on this important issue of fairness and revenue adequacy.

The Budget and Tax Center puts out dozens of briefs, fact sheets and reports on a wide range of issues that affect access to economic security in North Carolina.

In 2011, these publications included our Living Income Standard report, which is used by agencies and organizations throughout North Carolina to understand and assess the needs of working families. We also published a major report explaining how North Carolina can modernize its revenue system to make it fairer, more adequate and more stable.

Other topics about which we published research include the following:

- Poverty and food insecurity in North Carolina
- The state budget shortfall – both its causes and progressive solutions
- Federal fiscal policy
- Corporate taxes
- Tax credits for working families
- Long-term unemployment
- Unemployment benefits and the challenges of the unemployment insurance trust fund
- Public investments as a job creation strategy
- The state rainy day fund
- Teacher cuts in public schools
- Developmental education and financial aid in community colleges
- The importance of post-secondary credentials
NC Policy Watch is the state’s most prolific and respected voice for progressive policy change and an invaluable free media outlet for progressive nonprofits.

Our goal is to inform the public policy debate in order to bring about social, political and economic justice in North Carolina.

To achieve this goal, we generate a large and steady flow of timely, accurate and hard-hitting commentaries, analyses and investigative reports that inform elected officials, advocates, the news media and the public at-large. We also serve as a free media outlet for the Justice Center, its projects and the state’s progressive nonprofit advocacy community.

We distribute original content to North Carolina newspapers every weekday, and our columns appear on the opinion pages throughout the state regularly.

We work to increase the visibility of the Justice Center and other partner organizations. Every Monday morning, we publish The Week Ahead, which provides reporters throughout North Carolina with story ideas and contacts from progressive nonprofits. We also distribute Progressive Voices, a free weekly product that provides newspapers with opinion pieces written by staff of Policy Watch, the Justice Center, and numerous allied organizations.

Thousands of people visit the Policy Watch website each week, and thousands more receive our commentary, news reports and analyses via email every day. The NC Policy Watch blog, The Progressive Pulse, is one of North Carolina’s most active and important public policy websites.

Our newest special feature, Policy Watch Investigates, has quickly become an important source of high-quality, independent reporting. Since its unveiling in late 2010, the Investigates feature has spurred a federal investigation of a state lawmaker, exposed rampant problems in the state lottery, and helped spur a firestorm of public and media attention over a legislative effort to hold up state unemployment benefits as part

RIGHT: Scenes from a Crucial Conversations luncheon featuring University of North Carolina President Tom Ross
of state budget negotiations.

We speak frequently at forums and events throughout the state and regularly provide insights and expert analysis for various media outlets. NC Policy Watch Director Chris Fitzsimon is the host of the weekly syndicated radio show *News and Views*, which airs on several stations around the state. He is also a regular panelist on *NC SPIN*, a weekly television talk show about state government and politics, and his daily one-minute radio commentaries are featured every evening on WRLA-FM.

Our Crucial Conversations luncheon series brings prominent state and national leaders together with the community to talk about issues facing the state — from charter schools to same-sex marriage to care for those with mental illness. Many of the luncheons also feature the latest results from the regular Carolina Issues Polls, a feature that Policy Watch staff members developed with the nationally acclaimed polling firm Public Policy Polling. These polls test voter attitudes on an array of timely issues related to the Justice Center’s policy agenda.

In 2011, we held luncheons and other events in numerous North Carolina cities, including Charlotte, Asheville, Fayetteville and Boone.
ABOVE: Chris Fitzsimon at a Progressive Advocates lunch
RIGHT: Rob Schofield emcees the Crucial Conversations event on fracking
BELOW: Melissa Harris-Perry interviews Chris Fitzsimon on MSNBC’s Rachel Maddow Show.
BELOW, RIGHT: Sarah Ovaska speaking at a Crucial Conversations event

POLICY WATCH team, left to right: Ricky Leung, Sarah Ovaska, Clayton Henkel, Rob Schofield, and Project Director Chris Fitzsimon
The Justice Center Communications team expanded its reach considerably in 2011. For the third straight year, our media coverage reached a record high. Staff appeared in North Carolina newspapers, on television and on radio more than 1,700 times last year, an average of about 4.5 times per day. More than 300 different media outlets – including national and international publications – have covered the Justice Center. We also maintain dozens of Twitter accounts and multiple Facebook pages with more than 10,000 total followers.

This year, the Justice Center integrated communications work with advocacy more than ever before. We generated approximately 1.7 million messages to lawmakers, media, and allies using our online messaging system during 2011. Our coalition communications work also expanded considerably, as we provided communications support to more than two dozen allied organizations around the state.
MEDIA HITS IN 2011

COMMUNICATIONS team, left to right: Julia Hawes, Phyllis Nunn, Russell Baggett, Diane Morris, and Project Director Jeff Shaw
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The Justice Center wants to express its deep gratitude to those who have provided financial support for our work, especially during the economic turbulence of recent years.

We greatly appreciate the generous and diverse support we receive from state and national foundations and donors. Many of the philanthropic organizations and individuals listed here have been supporting the Justice Center’s work for more than a decade. Without these strong partners none of the progress we have made would have been possible.

This financial support has allowed us to increase our capacity, deepen our expertise, and extend our outreach throughout the state. Sustained funding has enabled us to strengthen and amplify our voice as advocates for poor and working families and individuals in North Carolina.

However, the economic downturn has impacted not only the people we serve but also the funding for our work. In the year ahead we must secure additional support from individuals throughout the state. Securing donations from new donors and greater commitments from our long-term supporters will be essential to our effort to build a strong and progressive North Carolina where prosperity is broadly shared and all of the state’s people have the opportunity to build healthy, productive and fulfilling lives.

If you want to be a partner with us in the work that we do, please go to www.ncjustice.org and make a gift or become a sustaining supporter of our work.

2011 EXPENDITURES
$4,556,121

2011 REVENUE BY TYPE

- State Foundations
- National Foundations
- Other
- Individual Donors

CORE STAFF

The accomplishments of the Justice Center’s advocates and specialists would not be possible without the support and dedication of the Justice Center’s core staff. Their leadership and hard work ensure that the organization remains fiscally strong.

CORE team, left to right: Mary Coleman, Chief Financial Officer; Melissa Clement, Administrative Assistant (front); Elise Elliott, Assistant Finance Director (back); Carlene McNulty, Director of Litigation; Melinda Lawrence, Executive Director; Bill Rowe, General Counsel & Director of Advocacy; Lucy Martinez, Director of Operations & Human Resources; Jan Nichols, Chief Technology Officer; (not pictured) Bill Wilson, Deputy Director
The Thirteenth Annual
DEFENDERS OF JUSTICE AWARDS  May 19, 2011

2011 Award Recipients

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