Report of President Hugh Macgill and Executive Director Sandy Klebanoff

2008 was an exceptionally difficult year for the Foundation. IOLTA funds, which depend on a vigorous real estate market and robust interest rates, dropped from $20,764,522 to $8,254,577. So drastic a fall necessitated a 50% cut in 2009 grants to Connecticut's legal service providers. As a result, layoffs, furloughs, and salary and benefit cuts have significantly reduced the availability of legal services to our neediest residents. We thank the lawyers, staff, and board members of the legal services agencies whose work in these difficult times continues to provide much needed legal representation to low-income residents, to whose previous tribulations must now be added joblessness and homelessness.

Although we recognize the state's deepening fiscal crisis, it is clear that the future of legal services is grim without significant additional state funding. We hope the General Assembly will appropriate the yield from increases in several law-related fees to legal aid. With that help, it may be possible to maintain the structure and integrity of legal services programs in our state, if not to sustain their prior levels of service.

The Sixth Alternative Dispute Resolution Symposium, co-sponsored by Quinnipiac University School of Law and chaired by Harry Mazadoorian, brought together an outstanding group to discuss present issues affecting ADR, and the James W. Cooper Fellows continued their commitment to the Foundation's mission through increased financial support and involvement in Fellows' projects. The enthusiasm, hard work, and dedication of Peter Arakas and Bill Logue are an inspiration to all Fellows.

We thank David Bogan, Susan Bryson, Tim Hazen (former Secretary), Linda Kelly, Victor Muschell (former President), and Deborah Tedford for their years of service on the board and we look forward to working with new board members Gregory Davis, John Logan, Ralph Monaco, and Christine Owens Morgan. We also thank Chief Justice Rogers and the Judicial Branch and the leadership of the Connecticut Bar Association for their vital support of the Foundation and IOLTA.

Even with all that help and support, it remains the case again this year that any good the Foundation has accomplished would have been impossible without the tireless efforts and unwavering support of the Foundation's staff.
## Grants

### Interest on Lawyers’ Trust Accounts/Interest on Trust Accounts (IOLTA/IOTA) / Judicial Branch Grants-in-Aid (JBGIA)

<table>
<thead>
<tr>
<th>Legal Services Providers</th>
<th>IOLTA/IOTA</th>
<th>JBGIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIDS Legal Network for Connecticut</td>
<td>$132,359</td>
<td>$6,756</td>
</tr>
<tr>
<td>provides legal assistance to low-income people with HIV/AIDS.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Center for Children’s Advocacy</td>
<td>$480,390</td>
<td>$21,708</td>
</tr>
<tr>
<td>provides legal advice to poor children statewide.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Children’s Law Center</td>
<td>$230,963</td>
<td>$11,028</td>
</tr>
<tr>
<td>provides representation to poor children in Hartford, New Britain, and Windham Judicial Districts.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Connecticut Fair Housing Center</td>
<td>$300,000</td>
<td>$10,482</td>
</tr>
<tr>
<td>represents those who have been victims of housing discrimination.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Connecticut Legal Rights Project</td>
<td>$819,331</td>
<td>$38,598</td>
</tr>
<tr>
<td>represents low-income people in state psychiatric hospitals and after discharge.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Connecticut Legal Services</td>
<td>$9,684,549</td>
<td>$494,663</td>
</tr>
<tr>
<td>provides general legal assistance in all areas of the state except Hartford and New Haven counties.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Greater Hartford Legal Aid</td>
<td>$4,180,012</td>
<td>$213,552</td>
</tr>
<tr>
<td>provides general legal assistance in greater Hartford.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lawyers for Children America</td>
<td>$123,333</td>
<td>$6,010</td>
</tr>
<tr>
<td>provides representation to poor children in Fairfield, Hartford, Middlesex, and New Haven counties.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Haven Legal Assistance</td>
<td>$3,337,305</td>
<td>$170,435</td>
</tr>
<tr>
<td>provides general legal assistance in New Haven County.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statewide Legal Services of Connecticut</td>
<td>$650,000</td>
<td>$20,268</td>
</tr>
<tr>
<td>provides intake for low-income people: offers self-help, brief service and referrals to the other legal aid providers in the state.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology Consulting Grant</td>
<td>$40,000</td>
<td></td>
</tr>
</tbody>
</table>

**LEGAL SERVICES TOTAL**

$19,978,242 $993,500

### Law School Scholarship Program

- Quinnipiac University School of Law $60,000
- University of Connecticut School of Law $60,000
- Yale Law School $60,000

**SCHOLARSHIP TOTAL**

$180,000

**GRAND TOTAL 2008**

$20,158,242 $993,500

---

(l-r) William Narwold, former CBF President and recipient of the Legal Services Leadership Award, with Dean Jeremy Paul

(l-r) Sung-Ho Huang with New Haven Legal Assistance Director Patricia Kaplan
Center for Children’s Advocacy, Inc. (CCA)

“Melissa”, 14 years old, had been abused and neglected and was suffering from Post Traumatic Stress Disorder (PTSD) with a history of admissions to a children’s psychiatric hospital. She was in Department of Children and Families (DCF) care and her parents’ parental rights had been terminated. Her behaviors led to her placement in a juvenile detention center. While at the center, her emotional status deteriorated, and she tried to jump off a landing and made other attempts to injure herself. Detention staff placed her in isolation and on a special status where she was monitored by two staff members at all times. She was eventually taken to the local Emergency Room, where she was kept in a back room in shackles. After four days, she stabilized and was sent back to detention. DCF and the Court Support Services Division’s (CSSD) plan for Melissa was to keep her in detention for five weeks while she was on the waiting list for Riverview Children’s Hospital. The Juvenile Court Judge appointed CCA as Melissa’s Guardian-Ad-Litem, and CCA successfully moved the court to order DCF to place Melissa in an appropriate treatment setting within 24 hours. Melissa is currently at a residential center and is doing better.

After CCA brought this issue of detained children to a meeting with the DCF Commissioner and the CSSD, the two agencies agreed to create a protocol for the cases of detained children who are in psychiatric crisis. The agencies also agreed to speed up the placement process by sending out more than one referral at a time to prospective placements.

History of IOLTA Income and Grants
This is a time of significant challenge for the legal aid network. The weak economy that has caused the collapse of IOLTA revenues has also caused an increase in need, as more and more people are without work. Domestic violence, homelessness, and problems with education and medical care continue to devastate the lives of the poor, disabled and elderly. But our staff has been incredible – facing our challenges with passion and determination, and continuing to solve problems, one by one (and sometimes many by many) for very poor households in great need.”

Steven Eppler-Epstein, Executive Director
Connecticut Legal Services, Inc.
**James W. Cooper Fellows Activities**

**High School Essay Contest**
Sixty-nine Fellows served as judges for the 2007-2008 statewide high school essay contest. The topic was “Mary's Pot Luck – Students' First Amendment Rights.” The winner received a $3,000 savings bond and the two runners-up received $1,500 savings bonds for educational use.

**Committee Members**
Andrea Barton Reeves, Chair
Peter Arakas
Mark R. Carta
Leo Diana
Robert A. Harris
Ann M. Siczewicz
Jack G. Steigelfest
Allan B. Taylor
Martha S. Triplett
William Logue

**Truancy Intervention Project**
The Truancy Intervention Project, a collaboration between the New Britain School System and volunteer attorneys, focuses on keeping middle school children in school. Twenty-five volunteer attorneys attended training sessions, and currently, there are sixteen active cases. The project is funded primarily through a grant from the American Savings Bank Foundation which is supplemented by funding from the Connecticut Bar Foundation (administrative overhead), and support from Connecticut Legal Services (office space), Children's Law Center (administrative oversight), and the Connecticut Bar Association (marketing and graphic design). Peter Arakas chairs the committee.

**Oral History of Connecticut Women in the Legal Profession Project**
The Oral History of Connecticut Women in the Legal Profession Project is entering its tenth year. The committee is working with a documentary film maker to make the project's thirty-one interviews accessible to the public.

**Committee Members**
Hon. Anne C. Dranginis, Chair
Claudia A. Baio
Nicole Bernabo
Alice A. Bruno
Frances Z. Calafiore
Kathryn Calibey
Dina S. Fisher
Linda J. Kelly
Michele G. Kostin
Jill E. Martin
Catherine A. Mohan

**Mentoring Program**
The Mentoring Program Subcommittee is developing a pilot mentoring program for new lawyers. The pilot has been approved by the Connecticut Bar Association, and the subcommittee is seeking an organization to assist with the pilot program.

**Committee Members**
Louis R. Pepe, Chair
Patricia R. Kaplan
Howard Klebanoff
Hon. Antonio C. Robaina
Dean Brad Saxton

**Ann B. Mulcahy**
Dean Jeremy R. Paul
Hon. A. Susan Peck
Hon. Barbara M. Quinn
Ellen K. Rutt
Stacy Smith Walsh
Marjorie S. Wilder

**(l-r) Justice Barry R. Schaller, Connecticut Supreme Court; Chief Justice Chase T. Rogers, Connecticut Supreme Court; Justice Christine S. Vertefeuille, Connecticut Supreme Court; Statewide Winner Taylor Norton, West Haven High School; Runner-up Patrick Manning, East Lyme High School; Runner-up Hannah Boettcher, East Lyme High School at the award ceremony for the Essay Contest held at the Connecticut Supreme Court in June.**
The Fellows welcomed forty-eight new Fellows at the April 30, 2008 Annual Reception at the New Haven Lawn Club.

Sustaining Life Fellows
Peter Arakas
Livia D. Fitzpatrick Barns الدول
James D. Bartelsni
Timothy D. Bates
Christopher D. Bernard
Audrey B. Blondin
L. Stewart Bohan
James E. Bowers
Samuel W. Bowly
Francis J. Brady
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Herbert E. Carlson, Jr.
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* Kathryn Emmett
* Robert J. Engelmann
* Dale P. Faulkner
* Timothy S. Fisher
* Karl Frechmann
* Carlo A. Forzani
* William F. Gallagher
James O. Gaston
Shelley D. Geballe
Cynthia Goulier George
John J. Giles, Jr.
* Rosemary E. Giuliano
* David S. Golub
* James R. Greenfield
* Ira B. Gruberg
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* Beverly J. Hodgson
Jennifer D. Jackson
Hon. Alfred J. Jennings, Jr.
Quintin Johnstone
* Linda J. Kelly
* Hon. James G. Kenerick, Jr.
* Judith M. Keppelmann
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* Charles G. Kingsley
* Howard Klebanoff
Kimberly A. Knox
Dean Harold Hongiu Koh
Michele G. Kostin
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* Robert M. Langer
* Elizabeth B. Leete
* Alan E. Lieberman
Hugh C. Magill
Donat C. Marchand
Harry N. Mazadoorian
Bruce A. Morrison
Marsha C. Mott
Victor M. Muschell
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Hon. Raymond R. Norko
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* Hon. Joseph H. Pellegretino
Charles A. Pillsbury
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* Hon. Barry R. Schaller
Ted M. See
Frank J. Silvestri, Jr.
* Hon. Robert H. Smith, Jr.
* Richard K. Snyder
Kate Sthre
James J. Tancrredi
Emmett F. Teitel
Kevin F. Thelen
William H. Truchsl
Martha S. Triplett
Stanley A. Twardy, Jr.
Frederic S. Ury
Diane W. Whitney
* John C. Yavis, Jr.
* Jacob D. Zeldes
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* Hon. Jon M. Ander
David Albert
Hon. Joan K. Alexander
Lori B. Alexander
Robert W. Allen
Anne L. Abston
Henry B. Anderson
* J. Danford Anthony, Jr.
* Hon. Janet Bond Arterton
David P. Atkins
Hillsel J. Auerbach
Ian Ayres
Zoe B. Baker
* Frank L. Baker
Richard F. Banshur
Morris W. Banks
Robert C. Barman, Jr.
Elizabeth C. Barton
Aaron S. Bayer
Stuyvesant K. Beams
* Richard G. Bell
* Penny Belfammy
David L. Belt
* Richard A. Bieder
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* William T. Fitzmaurice
Evan D. Flaschen
Garrett S. Flynn
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* Hon. Frank J. Forgie
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Robert T. Gilluly
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Stephen R. Haddow
* Edward F. Hennessy
* Hon. John W. Hetherington
Marcus L. Hincks
* Jon T. Hinschhoff
* + Alexander J. Holland
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* William R. Murphy
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* Anthony J. Natale
* Charles M. Needle
* Alan Neigher
* Elliott J. Nerenberg
* Hon. Alan H. Nevias
* Leo Nevias
* Hon. Jon O. Newman
* Dean Nell Jessup Newton
* Stephen L. Nightingale
* Hon. Martin L. Nigro
* Hon. Flemming L. Norcott, Jr.
* Anthony Nuzzo, Jr.
* Hon. Dennis J. O'Brien
* Gary B. O'Connor
* Edward J. O'Mara, Jr.
* Paul W. Orth
* Hon. Richard N. Palmer
* Melissa J. Pappanotes
* John A. Parese
* Louis I. Parley
* Louis R. Pepper
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* Hon. John W. Pickard
* H. James Pickerdstein
* Hon. Patty Jenkins Pittman
* Humbert J. Polito, Jr.
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* Carl M. Porta, Sr.
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* Linda L. Randell
* Judith A. Rawell
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* Tracy L. Rich
* James K. Robertson, Jr.
* Hon. Justine C. Rakich-Kelly
* Charles W. Roraback
The Sixth John A. Speziale Alternative Dispute Resolution Symposium

“Where Have We Come? What Lies Ahead?”

Co-sponsored by Quinnipiac University School of Law

A group of national, regional, and statewide ADR experts examined critical ADR issues involving regulation, legislation, best practices, ethics, and areas of potential future growth. Breakout discussion topics included ethics, consumer matters, collaborative law, courts/personal injury, commercial, family, community, and education areas. The keynote speaker was Kenneth R. Feinberg of The Feinberg Group LLP, and the symposium was held in May at Quinnipiac University School of Law.

Participants

Dorothy Adams, Executive Director, Dispute Settlement Center
Kenneth L. Andrichik, Senior Vice President, FINRA Dispute Resolution
Arthur E. Balbirer, Arbitrator and Mediator
James D. Bartolini, RisCassi & Davis PC
F. Paul Bland, Staff Attorney, Public Justice
Jennifer Gerarda Brown, Professor, Quinnipiac University School of Law
Frances Z. Calafiore, Law Offices of Frances Z. Calafiore
Brenda Cavanaugh, Associate Director, Community Mediation Inc.
Sally Esposito, Consultant, Conn. State Education Resource Center
Kenneth R. Feinberg, The Feinberg Group LLP
Timothy S. Fisher, McCarter & English LLP
Hon. William I. Garfinkel, Magistrate, United States District Court
Joseph D. Garrison, Garrison Levin-Epstein Chimes & Richardson, P.C.
David Geronemus, JAMS
Deborah R. Hensler, Professor, Stanford Law School
Hon. Arthur A.iller, Judge, Judicial District Courthouse
Beverly J. Hodgson, Arbitrator and Mediator
Hon. Robert L. Holzberg, Judge, Superior Court
Howard Klebanoff, Klebanoff & Alfano PC
John Lande, Professor, University of Missouri-Columbia School of Law
Lela P. Love, Professor, Benjamin N. Cardozo School of Law
Duncan MacKay, Northeast Utilities Service Company
Harry N. Mazadoorian, Distinguished Senior Fellow, Center on Dispute Resolution, Quinnipiac University School of Law
Lawrence R. Mills, Mills Meyers Swardling PSC

Marsha B. Moses, Berchem Moses & Devlin PC
William H. Narwold, Motley Rice LLC
Jacqueline Nolan-Haley, Professor, Fordham University School of Law
Rita S. Pollak, Massachusetts Collaborative Law Council
Brad Saxton, Dean, Quinnipiac University School of Law
Barbara Stark, Law Offices of Barbara Stark

John A. Speziale Alternative Dispute Resolution Symposium Planning Committee

Harry N. Mazadoorian, Chair
Jennifer Gerarda Brown
Frances Z. Calafiore
Timothy S. Fisher
Joseph D. Garrison
Beverly J. Hodgson
Hon. Robert L. Holzberg
Dean Brad Saxton
James H. Stark
# Financial Statement

## CONNECTICUT BAR FOUNDATION, INC.

### Statement of Financial Position

**December 31, 2008**

<table>
<thead>
<tr>
<th>Assets</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current assets:</strong></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$ 5,435,939</td>
</tr>
<tr>
<td>Investments, at fair market value</td>
<td>5,289,944</td>
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<tr>
<td>IOLTA - receivables</td>
<td>375,716</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>6,350</td>
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<tr>
<td><strong>Total current assets</strong></td>
<td>11,107,949</td>
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<tr>
<td><strong>Fixed assets:</strong></td>
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<tr>
<td>Leasehold improvements</td>
<td>2,680</td>
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<tr>
<td>Office furniture and equipment</td>
<td>95,417</td>
</tr>
<tr>
<td><strong>Accumulated depreciation</strong></td>
<td>(86,590)</td>
</tr>
<tr>
<td><strong>Net fixed assets</strong></td>
<td>11,507</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td>$ 11,119,456</td>
</tr>
</tbody>
</table>

### Liabilities and Net Assets

| Current liabilities:                                                 |          |
| Accounts payable and accrued expenses                               | $ 191,636 |
| **Total current liabilities**                                       | 191,636  |

| Net assets:                                                          |          |
| Unrestricted                                                         | 712,696  |
| Temporarily restricted                                               | 10,215,124 |
| **Total net assets**                                                 | 10,927,820 |
| **Total liabilities and net assets**                                 | $ 11,119,456 |

Complete audited financial statements are available at the Connecticut Bar Foundation offices.

## Connecticut Bar Foundation Contributors

We wish to thank the supporters, including the James W. Cooper Fellows, whose generous contributions make the programs of the Foundation possible:

**Platinum**
- Koskoff, Koskoff & Bieder, P.C.
- McCarter & English LLP
- Stratton Faxon

**Silver**
- Bingham McCutchen LLP
- Murtha Cullina LLP
- Pepe & Hazard LLP
- RisCassi & Davis P.C.

**Bronze**
- Arnold Y. Kapiloff
- Valerie Maze Keeney
- Sandy F. Klebanoff
- Beth Z. and Martin B. Margulies
- Victor M. Muschell
- Pullman & Comley, LLC in honor of Marjorie S. Wilder
- Trachsel Family Foundation

**Annual Reception Sponsors**
- Bank of America
- Kronholm Commercial Insurance, Inc.

**Bequest**
- Estate of Catherine Roraback

**Foundation/Legal Services Supporters**
- Barbara D. Aaron and Jeffrey A. Nese
- Laura F. Baldini
- Joan D. and Robert C. Barnum, Jr.
- CATIC Foundation Inc.
- Ranjana and Surendra Kumar Chawla
- Doris M. and William R. Davis
- Ira B. Grudberg

**ADR Symposium Co-Sponsored by Quinnipiac University School of Law**

- Koskoff, Koskoff & Bieder, P.C.
- McCarter & English LLP
- Stratton Faxon

**Bequest**
- Estate of Catherine Roraback

**Foundation/Legal Services Supporters**
- Arnold Y. Kapiloff
- Valerie Maze Keeney
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- Trachsel Family Foundation