



## Looking Ahead: James W. Cooper Fellows Programs

The Tenth John A. Speziale Alternative Dispute Symposium has been scheduled for Friday, March 17, 2017 at the Quinnipiac University School of Law. The symposium planning committee continues to meet to refine the panel topics and identify and choose speakers who will address various issues related to environmental and land use dispute resolution. Additional details about this full-day event will be forthcoming soon.

James I. Glasser of Wiggin and Dana LLP is chair of the third Judge Mark R. Kravitz Symposium and would welcome participation on the symposium's planning committee. If you're interested in helping or want additional information, please contact Don Philips at [don@cbf-1.org](mailto:don@cbf-1.org) or 860-722-2494.

The History of Women in the Legal Profession project is planning to complete 25 video interviews by the end of this year. Arrangements to update and complete the judges portraits project are also underway. The project is co-chaired by Ann Rubin of Carmody, Torrance, Sandak, Hennessy and Judge Susan Peck. To find out how you can get involved, please contact Liz Drummond at [liz@cbf-1.org](mailto:liz@cbf-1.org) or 860-722-2494.

There are many other Fellows programs and projects that are on-going or being planned. A memo from Fellows Chair Bill Logue and Fellows Education and Program Committee Chair Dwight Merriam will be emailed in early September explaining the variety of ways Fellows may get involved. From planning or attending a symposium to hosting a Roundtable, participating as a judge in the for the high school essay contest to volunteering for the Truancy Intervention Project, opportunities abound to engage in activities that promote a better understanding of the legal profession and the judicial system among the citizens of Connecticut.

## Fellows Nominations

Early in September, The CBF Fellows Nominating Committee will be contacting every Fellow for recommendations for the Fellows Class of 2017.

Based on input from Fellows, the Nominating Committee shall recommend new Fellows for consideration and election by the Board of Directors in November. Judges and attorneys who fulfill the requirements of (1) demonstrated legal ability, (2) devotion to the welfare of the community, state and nation, and (3) advancement of the legal profession, including professional and community activities, legal teaching experience, publications, professional recognition or memberships, are eligible for nomination.

If you have any questions or would like information on the activities of the Fellows, please contact Don Philips, CBF Executive Director, at 860-722-2494 or at [ctbf@cbf-1.org](mailto:ctbf@cbf-1.org).

## Foundation Briefs

### Bank of America Settlement — Surplus Distribution

In July 2016, the Connecticut Bar Foundation received \$2,866,199, representing its share of the Bank of America Settlement Surplus Distribution. According to the terms and conditions for acceptance, the distribution must be used solely for the purpose of providing funds to legal aid organizations in the state of Connecticut for foreclosure prevention legal assistance and community redevelopment assistance. The CBF is developing a strategy for distribution and plans to issue requests for proposals or grant applications in early 2017.

### Fellows Feedback

On April 18, 2016, Quinnipiac University School of Law hosted the Fellows Roundtable "The Happy Lawyer: A Myth or a Real Possibility?" CBF Fellow Professor Carolyn Kaas and Quinnipiac Law students presented the findings and conclusions from the book "The Happy Lawyer: Making a Good Life in the Law" by Nancy Levit and Douglas Linder. A lively debate among Fellows and students followed.

After the roundtable, CBF Fellow Kerry R. Callahan of Updike Kelly & Spellacy, P.C. said "The Happy Lawyer' presentation and discussion revealed that balance is achievable and that civility and collegiality among lawyers, although not always apparent, is still very much alive."

## CBF Grantmaking and Grant Administration

In a two-part series on how the CBF makes and administers grants, the first article published in the Spring 2016 CBF Newsletter focused on the practices and procedures the CBF employs to make grant decisions. This second installment examines how the CBF administers its grants.

There are 63 eligible financial institutions (banks and credit unions) that offer Interest on Lawyers' Trust Accounts (IOLTA) for Connecticut attorneys. The interest earned on the IOLTA accounts at these institutions is remitted to the CBF each month. In addition, the Judicial Branch makes monthly distributions to the CBF from court fee revenues collected to fund the Court Fee Grants-in-Aid (CFGIA) program. Payments from the Judicial Branch Grants-in-Aid (JBGIA) program are submitted to the CBF on a quarterly basis. Based upon the grant allocations recommended by the CBF Grantmaking Committee and approved by the CBF Board of Directors, monthly disbursements for IOLTA and CFGIA grants and quarterly distributions for JBGIA grants are sent to grantees.

The CBF tracks IOLTA and court fee revenues closely and also monitors average balances of IOLTA accounts. Quarterly revenue reports showing IOLTA and court fee revenues are produced and distributed to the CBF Executive Committee and the grantees. Because grants are made based upon projected revenues from these sources, it is important to monitor whether actual revenues received are meeting projections. If IOLTA revenue fails to meet projected amounts, the CBF historically has used its reserves to make up the difference. If court fee revenue lags behind projections, the grants to legal service providers are proportionately reduced.

Pursuant to statutory and other authority given to the CBF and as the organization designated by the Judicial Branch to administer the IOLTA, CFGIA and JBGIA programs, the CBF provides comprehensive annual reports to the Judicial Branch for the grants it makes and administers. These reports include numerous historical data and graphs as well as applications and budget to actual reports from each grantee. They are made available to every state court judge and are presented to the Judicial Branch Executive Committee of the Superior Court.

The CBF takes very seriously its grantmaking and administrative roles. As the custodian of public funds, it has a duty to assure that every dollar it distributes is used in accordance with the requirements set forth by the laws of the State of Connecticut. The CBF has accomplished these roles effectively and efficiently, **granting over 97 percent** of all revenues received from IOLTA, CFGIA and JBGIA from 1989 through 2015. The CBF expresses its gratitude to the three branches of state government, its volunteer leaders and donors, the CBF Leadership banks and other eligible financial institutions, and its grantees for their contributions toward making justice accessible for every Connecticut resident.

### James W. Cooper Fellows Sixteenth Annual Quintin Johnstone Statewide High School Essay Contest Winners



From L – R: Stephanie M. Walsh, Runner-Up; Kyle M. Adams, Statewide Winner; and Michaela D. Cohen, Runner-Up.

## Leadership Banks

We extend thanks to our Leadership Banks that pay the highest rate on IOLTA and IOTA balances and generously waive service fees. Please consider using a Leadership Bank for your IOLTA accounts!

**Bank of New York Mellon**

**Start Community Bank**

**Sterling Bank**

**Thomaston Savings Bank**

**Torrington Savings Bank**

**Washington Trust Company**

**Westfield Bank**

## Update on “Civil Gideon” Task Force

The Task Force to Improve Access to Legal Counsel in Civil Matters met on August 25, 2016 and organized four separate working groups comprising Task Force members and volunteer law students to begin collecting and analyzing data that will assist it in making its report and recommendations to the Judiciary Committee by December 15, 2016.

Task Force Co-chairs William H. Clendenen, Jr. and Dean Timothy Fisher appointed members to one of four working groups that will propose topics, develop materials and submit reports to the full Task Force. The areas of research and review are 1) goals and principles; 2) dismantling barriers; 3) demand and supply; and 4) a survey of programs in Connecticut and other states. The working groups are chaired respectively by Jennifer Brown, Dean, Quinnipiac University School of Law; Michael J. Wishnie, Deputy Dean for Experiential Education, Yale Law School; Hon. Gerald J. Fox, III, Probate Judge; and James T. “Tim” Shearin, CBF President.

During the August 25th meeting, members of the Task Force discussed the parameters for each working group, the possibility of holding one or more public hearings, and issues and suggestions concerning its charge as set forth in Special Act 16-19.

The Task Force is next scheduled to meet on September 30, 2016.

Additional information about the Task Force is available on the General Assembly website at [https://www.cga.ct.gov/jud/taskforce.asp?TF=20160729\\_Task%20Force%20to%20Improve%20Access%20to%20Legal%20Counsel%20in%20Civil%20Matters](https://www.cga.ct.gov/jud/taskforce.asp?TF=20160729_Task%20Force%20to%20Improve%20Access%20to%20Legal%20Counsel%20in%20Civil%20Matters).

Please feel free to contact Don Philips at the CBF if you have any questions.

### Task Force Members

**Chairperson William H. Clendenen, Jr. #**

**Chairperson Timothy Fisher #**

Judge Michael A. Albis

Brian Austin, Jr.

Catherine Bailey

**Jamey Bell**

**Dean Jennifer Brown +**

Sen. Eric Coleman

**Kathleen M. Flaherty**

Judge Gerald Fox, III

Jason Fragoso

**Monte Frank**

Daniel S. Jo

Sen. John Kissel

Walter A. Menjivar

**Judge Ingrid L. Moll #**

**Susan Garcia Nofi**

**Edward V. O’Hanlan +**

**Robert C. Hinton \***

Rep. Rosa Rebimbas

Anthony Shannon

**James T. “Tim” Shearin #**

Judge Elliot N. Solomon

**Chief Public Defender Susan O. Storey \***

**Cecil Thomas**

Alvin Wilson

**Deputy Dean Michael J. Wishnie**

**Deborah R. Witkin \***

Judge Glenn A. Woods

**Perry Zinn Rowthorn**

**CBF Fellows listed in bold. Symbols following names denote additional Fellows status.**

# Catherine Roraback Circle Fellow

+ Sustaining Life Fellow

\* Life Fellow