



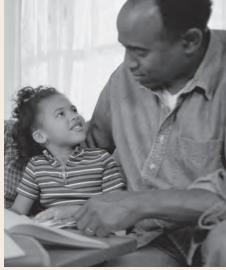
The Connecticut Bar Foundation Annual Report

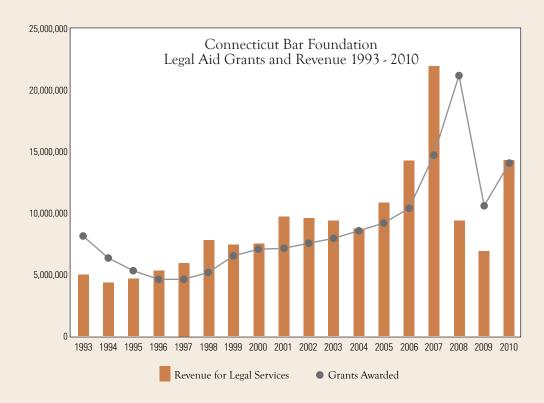
2010

AIDS Legal Network for Connecticut (ALN)/ Greater Hartford Legal Aid, Inc., (GHLA)

Ms. C is a young mother with AIDS. In order to qualify for cash assistance for her family, she had to be employed. All her attempts to work resulted in termination because her illness and medications interfered with the quality of her work. GHLA persuaded the state to exempt her from the work requirement. GHLA also won Ms. C's appeal for disability benefits thereby further increasing her income.







IOLTA LEADERSHIP BANKS

(as of June 2011)

During this time of historically low interest rates, these banks have volunteered to pay a net yield that is higher than the yield they are required to pay on IOLTA. The Connecticut Bar Foundation was proud to honor the Platinum and Leadership Banks for helping to provide legal services for low-income households in crisis throughout Connecticut at the Foundation's Annual Reception.

Platinum Leadership Bank

Rockville Bank

Leadership Banks

- The Connecticut Bank and Trust Company
- First Niagara Bank, N.A.
- Hudson Valley Bank, N.A.
- Salisbury Bank & Trust Company
- Savings Bank of Danbury
- Sovereign Bank New England
- TD Bank, N.A.
- Thomaston Savings Bank
- Torrington Savings Bank
- Union Savings Bank
- Washington Trust Company
- Webster Bank, N.A.

We urge you to choose a Platinum or Leadership Bank to improve access to justice in Connecticut.

<u>Grants</u> Interest on Lawyers' Trust Accounts/Interest on Trust Accounts (IOLTA/IOTA) Judicial Branch Grants-in-Aid (JBGIA), Court Fees Grants-in-Aid (CFGIA)

Legal Services Providers	IOLTA/IOTA	JBGIA	CFGIA	GRANTS
AIDS Legal Network for Connecticut provides legal assistance to low-income people with HIV/AIDS.	\$ 27,200	\$ 8,444	\$ 59,289	PAID \$ 94,933
Center for Children's Advocacy provides legal advice to poor children statewide.	\$ 86,800	\$ 26,946	\$ 189,203	\$ 302,949
Children's Law Center provides representation to poor children in Hartford, New Britain, and Windham Judicial Districts.	\$ 49,200	\$ 15,274	\$ 107,244	\$ 171,718
Connecticut Fair Housing Center represents those who have been victims of housing discrimination.	\$ 51,600	\$ 16,018	\$ 112,475	\$ 180,093
Connecticut Legal Rights Project represents low-income people in state psychiatric hospitals and after discharge.	\$ 176,400	\$ 54,761	\$ 384,509	\$ 615,670
Connecticut Legal Services provides general legal assistance in all areas of the state except Hartford and New Haven counties.	\$ 1,981,600	\$ 615,164	\$4,319,399	\$ 6,916,163
Greater Hartford Legal Aid provides general legal assistance in greater Hartford.	\$ 855,200	\$ 265,487	\$1,864,126	\$ 2,984,813
Lawyers for Children America provides representation to poor children in Fairfield, Hartford, Middlesex, and New Haven Counties.	\$ 23,200	\$ 7,201	\$ 50,569	\$ 80,970
New Haven Legal Assistance provides general legal assistance in New Haven County.	\$ 682,800	\$ 211,967	\$1,488,336	\$ 2,383,103
Statewide Legal Services of Connecticut provides intake for low-income people and offers self help, brief service, and referrals to the other legal services in the state.	\$ 66,000	\$ 20,488	\$ 143,864	\$ 230,352
Technology Grant LEGAL SERVICES TOTAL	<u>\$ 102,190</u> \$ 4,102,190	\$1,241,750	\$8,719,014	<u>\$ 102,190</u> \$14,062,954

Technology Grant

The Connecticut Network for Legal Aid, a group of IOLTA grantees, developed www.ctlawhelp.org. This web site, funded by the Connecticut Bar Foun-



"We are very grateful for the IOLTA Scholarships. Over the years, they have allowed us to make need-based grants to deserving Connecticut residents, helping them manage the financial challenges involved in completing a legal education. The IOLTA Scholarship Program

has helped us meet our continuing goal of educating and graduating students who will become leaders within the Connecticut and regional legal communities."

Dean Brad Saxton *Quinnipiac University School of Law* dation and the Legal Services Corporation, seeks to further the goal of equal access to justice by providing information and self-help materials on a variety of legal issues.

Law School Scholarships

Quinnipiac University School of Law, the University of Connecticut School of Law, and Yale Law School each received \$10,000 from the Connecticut Bar Foundation's IOLTA Law School Scholarship Program.

Cy Pres Acknowledgement

The Foundation gratefully acknowledges a \$23,889.18 cy pres distribution from the class action settlement of In re UCAR International Inc., Securities Litigation, Case No. 3:98-CV-0600-JBA (D. Conn.). The Foundation extends its special thanks to United States District Judge Janet Bond Arterton, who approved the cy pres award.

James W. Cooper Fellows Activities

Law and Technology Symposium

The Law and Technology Symposium, Flash Forward or Lost: How Technology is Changing the Practice of Law, and What's Next, was held at the University of Connecticut School of Law on April 9, 2010. Practicing lawyers, bloggers, and legal technology and social media experts discussed how technology is changing the practice of law. Subject areas included the restructuring of attorney/client relationships based on technology, a generational approach to technology use, the impact of social media and social networking on the practice of law, and ethical considerations in the use of technology. The symposium was webcast simultaneously.





Jeremy Paul, Dean, University of Connecticut School of Law, at the Law and Technology Symposium

l-r) Robert Ambrogi, Daniel Schwartz, Wesley Horton at the Law and Technology Symposium



Mark Dubois, Chief Disciplinary Counsel, at the Law and Technology Symposium

Participants

Robert J. Ambrogi, Law Office of Robert J. Ambrogi David Atkins, Pullman & Comley LLC N. Kane Bennett. Raymond & Bennett LLC Tory Woodin Chavey, Jackson Lewis, LLP Joseph D. D'Alesio, Connecticut Judicial Branch Sharon Wicks Dornfeld, Attorney and Counselor at Law Mark A. Dubois, Connecticut Chief

Disciplinary Counsel Timothy S. Fisher, President, Connecticut Bar Foundation; McCarter & English LLP Wesley W. Horton, Horton, Shields & Knox, PC Julie Jones, Associate Director for Library Services, Adjunct Professor of Law, University of Connecticut School of Law Patricia R. Kaplan, Executive Director, New Haven Legal Assistance

Ross L. Kodner. President & Founder, MicroLaw Susan Cartier Liebel, Founder. Solo Practice University Rvan McKeen, Leone, Throwe, Teller & Nagle; Publisher of A Connecticut Law Blog Jane Moriarty, Professor, Akron Law School Kevin O'Keefe. CEO & Publisher, LexBlog Jeremy R. Paul, Dean, University of Connecticut School of Law Louis R. Pepe, Pepe & Hazard LLP Brent Robertson. President & Chief Creative Officer, Fathom Brad Saxton, Dean, Quinnipiac University School of Law Daniel A. Schwartz, Pullman & Comley LLC; Publisher of Connecticut **Employment Law Blog**

Committee Members

Daniel A. Schwartz, Chair Ann Crawford Mark A. Dubois Ross H. Garber Julie Jones Carolyn W. Kaas Darcy Kirk Dwight H. Merriam Dean Jeremy R. Paul Dean Brad Saxton

Oral History of Connecticut Women in the Legal Profession Project

Thirty-two women have been interviewed since the inception of the Oral History Project in 1999. Karyl Evans, a documentary filmmaker, has created 8 short video clips to be streamed on the internet.

Truancy Intervention Project

The goal of the Truancy Intervention Project is to keep middle schoolaged children in school through the intervention of attorney volunteers who serve as advocates and role models for the children. The Project is funded primarily through grants from the American Savings Foundation and Newman's Own Foundation with supplemental support from the Connecticut Bar Foundation and the New Haven County Bar Foundation. Additional support for the Project has been provided by Connecticut Legal Services, New Haven Legal Assistance, The Children's Law Center, and the Connecticut Bar Association. Between the Project's inception in 2006 and the close of 2010. sixty-three children were enrolled and thirty-nine attorneys served as volunteers. Average monthly student absences decreased by 65%. The Project is currently operating in the New Haven and New Britain school systems.

Committee Members

Livia D. Barndollar, Chair Peter Arakas Steven Eppler-Epstein Howard Klebanoff

Mentoring Program

The New Haven County Bar Association Mentoring Committee paired twentyone seasoned attorneys with twenty-one new lawyers for a one year program. The new admittees were mentored and counseled on the many issues and challenges confronting lawyers during their first year in the profession.

James W. Cooper Fellows Activities (continued)

Committee Members

Louis R. Pepe, Chair Patricia R. Kaplan Howard Klebanoff William H. Prout, Jr. Hon. Antonio C. Robaina Stephen E. Ronai Dean Brad Saxton

Fellows Education and Program

Committee Members

William Logue, Chair Peter Arakas Vanessa Roberts Avery Livia D. Barndollar James D. Bartolini Peter L. Costas Hon. Juliett L. Crawford Joseph D. D'Alesio Steven D. Ecker Steven Eppler-Epstein John R. Flores

Rosemary E. Giuliano Robert W. Gordon Charles B. Higgins Robert C. Hinton Sung-Ho Hwang Norman K. Janes Quintin Johnstone Carolyn W. Kaas Scott M. Karsten Howard Klebanoff Robert M. Langer Dwight H. Merriam Christine O. Morgan Dean Jeremy R. Paul Louis R. Pepe Hon. Antonio C. Robaina Stephen E. Ronai Debra C. Ruel Dean Brad Saxton Hon. Jonathan E. Silbert Toni Smith-Rosario Marilyn Toland Frederic S. Ury Michael S. Wilder

Alternative Dispute Resolution Symposium

The John A. Speziale Symposium, Achieving the Goals of Criminal Justice: A Role for Mediation? was held at Quinnipiac University School of Law on October 15, 2010. Presentation areas included the use of mediation services in adult criminal courts, juvenile courts, schools and communities; restorative justice programs in Connecticut and Maryland; and the use of mediation to address prisoner re-entry issues. The symposium drew attendees from a variety of fields ranging from judges, prosecutors and public defenders, to prisoners rights representatives, probation and parole staff.

Participants

Dorothy Adams, Executive Director, Dispute Settlement Center Deborah D. Barrows, Senior Court Liaison/Case Manager, Hartford Area Mediation Program Maura Brennan. Juvenile Probation Supervisor, Superior Court for Juvenile Matters, Bridgeport Jennifer G. Brown, Professor, Quinnipiac University School of Law Joe Brummer, Associate Executive Director, Community Mediation, Inc.

Trent Butler. Intervention Prevention Specialist William H. Carbone, Executive Director, Court Support Services Division, Judicial Branch Brenda Cavanaugh, Executive Director, Community Mediation, Inc. Lorig Charkoudian, Executive Director, Community Mediation Maryland Linda J. Cimino, Director, Connecticut Office of Victim Services Mark V. Collins, Assistant Coordinator, New York State Unified Court System

Carol Dreznick, Juvenile Prosecutor, Superior Court for Juvenile Matters, Stamford Sharon M. Elias, Supervisory Assistant Public Defender, Superior Court for Juvenile Matters, Waterbury Timothy S. Fisher, President, Connecticut Bar Foundation; McCarter & English LLP Dudley Flake, Court Coordinator, Community Mediation, Inc. Shawn M. Flower, Principal Researcher, Choice Research Associates Janine P. Geske, Professor, Former Wisconsin Supreme Court Justice; Distinguished Professor of Law, Marquette University School of Law Marilou T. Giovannucci, Manager, Court Service Officer Programs, Superior Court Operations Division, Judicial Branch Carolyn W. Kaas, Associate Professor of Law, Quinnipiac University School of Law A. Stephen Lanza, Executive Director, Family **Re-Entry** Sherman Cassidy Malone, Director of Case Management and Clinical Services. New Haven Family Alliance Lisa A. McKenna, Director of Court Mediation Services, Dispute Settlement Center Dennis McLaughlin, Associate Dean of Students, Trumbull High School Linda Meyer, Professor, Quinnipiac University School of Law Donna Decker Morris, Associate Professor, Director of the Legal Studies Program, University of New Haven Elizabeth Murphy, Mediator, Youth & Schools Coordinator, Dispute Settlement Center Charles A. Pillsbury, Executive Director, Mediators Beyond Borders

Kendy Rossi,

Program Manager,

Hartford Area Mediation Program Brad Saxton, Dean, Quinnipiac University School of Law Hon. Jorge A. Simon, Judge, Superior Court for Juvenile Matters, Rockville Mark R. Soboslai, Law Offices of Mark R. Soboslai David J. Strollo, Supervisory Assistant State's Attorney, Judicial District of New Haven

ADR Symposium Planning Committee

Charles A. Pillsbury, Co-Chair Mark R. Soboslai, Co-Chair Dorothy Adams Jennifer G. Brown Karen Donnelly Timothy S. Fisher Carolyn W. Kaas Hon. Raymond R. Norko Darren Pruslow James H. Stark David J. Strollo



Hon. Janine Geske, keynote speaker



Hon. Jorge Simon with Deborah Barrows



Jennifer Brown with Charles Pillsbury

Financial Statements

CONNECTICUT BAR FOUNDATION, INC. Statement of Financial Position December 31, 2010

December 31, 2010		_
Assets	2010	C
Current assets Cash and cash equivalents Investments IOLTA receivables Pledges receivable, net Accounts receivable, net	\$ 1,813,968 4,644,115 383,262 57,700 14,995	
Total current assets	6,914,040	
Property and Equipment, net	4,135	Ex
Other assets Pledges receivable, net, less currrent portion	149,151	
Total assets	<u>\$ 7,067,326</u>	UU
Liabilities and Net Assets		C
Current liabilities Accounts payable and accrued expenses	\$ 56,931	
Net assets Unrestricted Temporarily restricted	1,089,544 5,920,851	
Total net assets	7,010,395	
Total liabilities and net assets	\$ 7,067,326	Te Ad Te
		Te

CONNECTICUT BAR FOUNDATION, INC. Statement of Activities and Changes in Net Assets For the year ended December 31, 2010

Changes in Unrestricted Net Assets	2010
Revenue and Support Contributions	\$ 124,324
Realized and unrealized gain	90.202
on investments, net Interest and dividends	80,302 32,011
Other income	10,570
Total revenue and support	247,207
Net assets released from restrictions	14,692,934
Total revenue	14,940,141
Expenses	
General and administrative	597,474
Grants and programs	14,186,300
Total expenses	14,783,774
Change in unrestricted net assets	156,367
Unrestricted Net Assets, beginning of year Unrestricted Net Assets, end of year	<u>933,177</u> \$ 1,089,544
Changes in Temporarily Restricted Net Assets Revenue and Support	• • • • • • • • • •
Court Fees Grants-in-Aid	\$ 8,974,945
IOLTA income Judicial Branch Grants-in-Aid	3,915,802 1,250,000
Interest and dividends	277,102
Pledged contributions, Fellows program	85,982
General Foundation - Speziale fund	4,120
Realized and unrealized gain on investments,	net <u>3,39</u>
Total revenue and support	14,511,346
Net assets released from restrictions	(14,692,934) $(181,588)$
Change in temporarily restricted net assets Temporarily Restricted Net Assets, beginning of	
Adjustment to record unconditional promise to	
Temporarily Restricted Net Assets, beginning of	
year, as adjusted	6,102,439
	\$ 5,920,851
Temporarily Restricted Net Assets, end of year	+ - ;; = -; ;

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

Connecticut Bar Foundation Contributors Ar

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

Alternative Dispute Resolution Symposium

Event Sponsor

 Koskoff Koskoff & Bieder, PC

Co-Sponsors

- Day Pitney LLP
- McCarter & English, LLP
 McElroy Deutsch Mulvaney
- & Carpenter, LLP
- Silver Golub & Teitell, LLP

Law & Technology Symposium

Event Sponsors

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 & Video LLC
- Connecticut Law Tribune
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Annual Reception

Event Sponsor Webster Bank

Sponsors

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In-Kind Contributions

Connecticut Bar Association Quinnipiac University School of Law University of Connecticut School of Law

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Memorial Contributions

Hon. Stuart Bear – In memory of Gladys and Philip Bear Sylvia Heiman – In memory of Judge Maxwell Heiman John A. and Marcia J. Speziale In memory of Judge and Mrs. John A. Speziale John A. and Marcia J. Speziale In memory of Mr. and Mrs. Robert Ross

Fellows Activities - Essay Contest



Front row (l-r) Runner-up Hannah Rosner, Hopkins School, Connecticut Supreme Court Senior Associate Justice Christine S. Vertefeuille, Statewide Winner Emily Grier, Newtown High School, Runner-up Kingston Pung, Hopkins School **Back row (l-r)** Timothy S. Fisher, Andrea Barton Reeves, Brad Saxton, William Logue

High School Essay Contest

The 2009-2010 statewide high school essay contest topic, "The Trouble with Texting," dealt with the issue of "sexting" by high school students. The contest generated participation by forty-six schools. Over ninety Fellows judged the sixty-eight entries. 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 Daniel P. Brown, Jr. Leo V. Diana Robert A. Harris Bill Logue Dean Brad Saxton Ann M. Siczewicz Jack G. Steigelfest Allan B. Taylor

Children's Law Center of Connecticut, Inc. (CLC)

When Justin, Josh, and Julian first came to the attention of CLC, their parents were in the midst of a difficult divorce, and the welfare of the boys was in danger, including claims of abuse. DCF became involved as the parents divorced. The case was reopened several times, and a CLC attorney advocated for the boys. All 3 boys are now thriving and appear to have healthy relationships with each other and their father.



Fellows Activities - Annual Reception



(l-r) Alice Bruno, Amy Meyerson, Matthew Gordon, Ralph Monaco, Sung-Ho Hwang, Kathryn Calibey



(l-r) Timothy Fisher with Hon. Guido Calabresi



Steven Eppler-Epstein, recipient of the Legal Services Leadership Award



(l-r) William Logue with Harry Mazadoorian, recipient of the Distinguished Service Award



(l-r) Hon. Alexandra DiPentima, Joseph D'Alesio, Hon. Chase Rogers



(l-r) Erika Tindill with Joanne Lewis

Connecticut Bar Foundation Board of Directors

Officers

Timothy S. Fisher, President Peter Arakas, Vice President William H. Trachsel, Treasurer D. Larkin Chenault, Secretary

Board of Directors

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Front row (l-r) Hugh C. Macgill, Sandy Klebanoff, Timothy S. Fisher, Peter Arakas, D. Larkin Chenault **Back row (l-r)** Robert C. Post, Brad Saxton, Livia D. Barndollar, James Sicilian, Frederic S. Ury, Bruce R. Peabody, Amy Lin Meyerson, Christine O. Morgan, Don H. Liu, Ingrid L. Moll, Ralph J. Monaco, James T. Shearin, Joseph D. D'Alesio

Louis R. Pepe Ted M. See (through 2/10) James T. Shearin James Sicilian (as of 2/10) Toni Smith-Rosario Kate Stith Frederic S. Ury

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Report of President Timothy S. Fisher and Executive Director Sandy Klebanoff

We are pleased to present the 2010 Annual Report of the Connecticut Bar Foundation. It was a year of great challenges, but also one of great achievements, in which we expanded our programs and built bases for future strength, all while enduring great pressures on our principal funding streams.

We saw historic lows hit our traditional mainstay of legal service funding, Interest on Lawyers' Trust Accounts (IOLTA), which dipped below \$4 million just a few years after we had revenues over \$20 million. The reduction was offset in part through over \$8 million from Court Fees Grants-in-Aid (CFGIA), and \$1.5 million from Judicial Branch Grants-in-Aid (JBGIA). The net result was that our legal services grantees struggled to adjust to the lower grant levels of recent years, reducing expenditures by staff attrition, unpaid staff days, and other sacrifices. The terrible irony is that these legal aid organizations have been forced to reduce services just as poor peoples' need for services has increased due to the economic downturn.

At the same time that we have been grappling with reduced IOLTA funds, we have been laying the foundation for a stronger revenue stream, through such sources as Interest on Trust Accounts paid from non-lawyers' accounts. We have also worked with our grantees on new service delivery paradigms such as the Legal Aid Network's website, www.ctlawhelp.org.

Meanwhile, we are building stronger relations with Connecticut's network of legal service providers and other stakeholders, including the Connecticut Bar Association, bankers, and the state's Judicial, Executive and Legislative Branches. These efforts helped further our mission directly, while widening outreach and our future ability to build coalitions to achieve our goal of more meaningful access to justice for all the people of Connecticut.

Our thanks go to the 787 James W. Cooper Fellows who embody and support the Foundation's mission, and especially to the 31 members of the Fellows and Education Program Committee (FEPC). The leadership, enthusiasm, and dedication of Fellows Chair Dean Brad Saxton, and FEPC Chair Bill Logue are an inspiration to all.

The number of people who volunteered their time on Foundation activities was at an all-time high. Over 180 individuals, including our Board of Directors, participated in our programs, and over 100 Fellows spent many hours developing and implementing six outstanding programs. Special thanks go to Peter Arakas, Livia Barndollar, Andrea Barton Reeves, Hon. Anne Dranginis, Lou Pepe, Charlie Pillsbury, and Dan Schwartz for serving as chairs of these activities, and to the numerous participants who made these programs so successful. And, we thank the University of Connecticut School of Law and the Quinnipiac University School of Law for hosting our programs.

We express our gratitude to all Board members for their continuing enthusiasm and dedication. We thank Rosemary Giuliano, Pat McCoy, and Ted See for their service on the Board, and we look forward to working with new Board members Andrea Barton Reeves, Don Liu, and Jim Sicilian. We also thank Chief Justice Chase Rogers and the Judicial Branch and the leadership of the Connecticut Bar Association for their vital support of the Foundation and legal services for low income people. And finally, we convey our sincere appreciation to the outstanding Foundation staff for their tireless efforts, valuable contributions, and dedication during this period of increased activity.

The Connecticut Bar Foundation, 31 Pratt St., Hartford, CT 06103 860-722-2494 • Fax 860-722-2497 • Email ctbf@cbf-1.org • www.cbf.ctbar.org