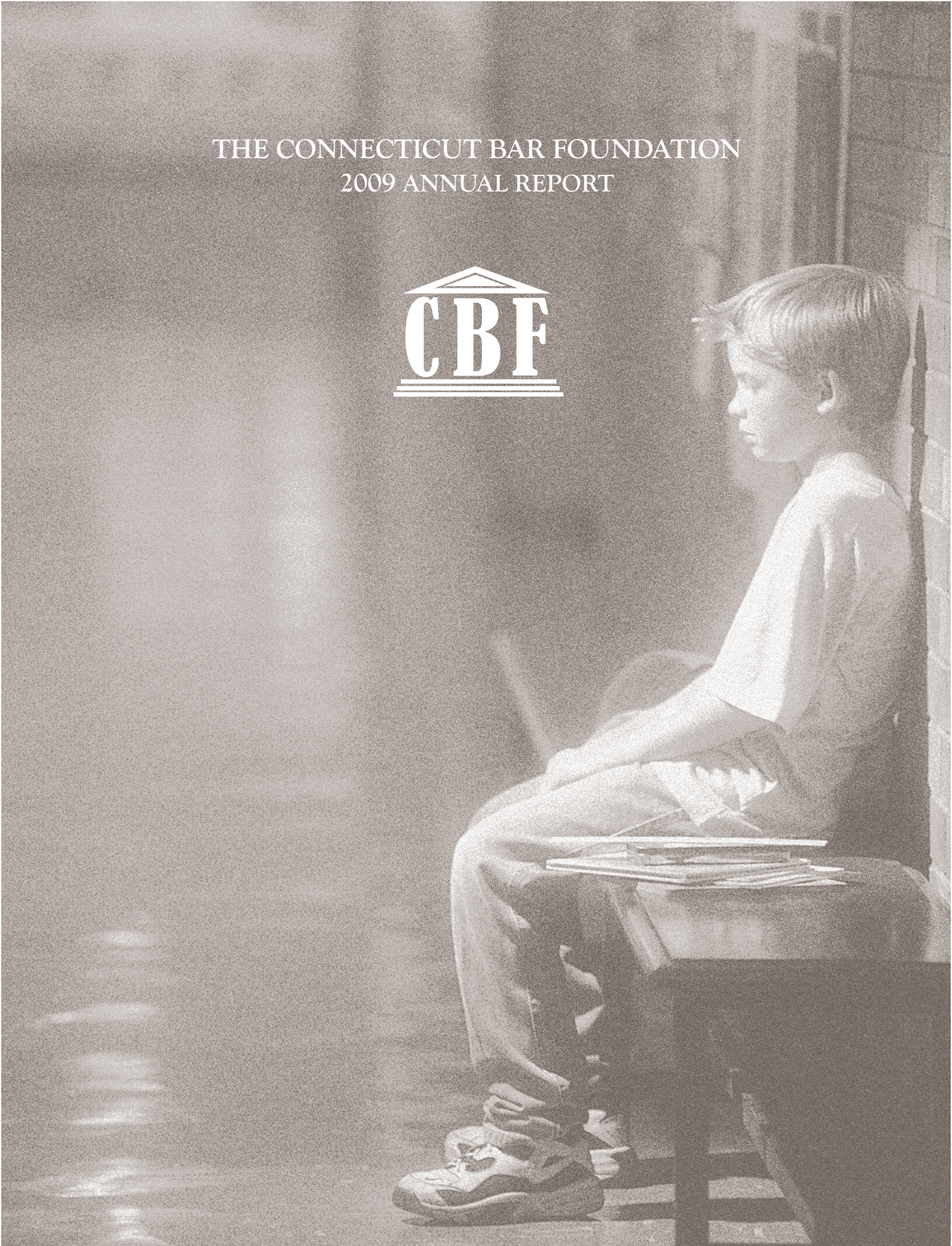
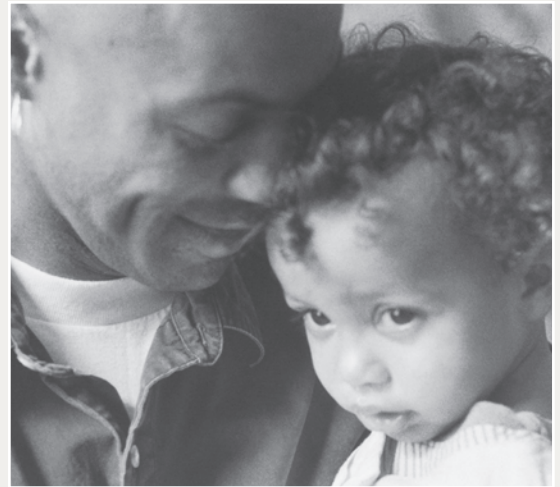


THE CONNECTICUT BAR FOUNDATION
2009 ANNUAL REPORT



“During 2009, the Connecticut Fair Housing Center continued to challenge the entrenched housing segregation so prevalent in Connecticut. The Center also provided legal assistance to homeowners in foreclosure by producing a guide for homeowners in foreclosure which has already gone into its second printing. Our staff, fully committed to the Center’s mission, continues their innovative and impressive work which is made possible in part by IOLTA, Judicial Branch Grants-in-Aid, and Court Fees Grants-in-Aid funding.”

Erin Kemple,
Executive Director
The Connecticut Fair
Housing Center, Inc.



Connecticut Fair Housing Center, Inc. (CFHC)

“Maria” was at risk of losing her apartment of 4½ years when she attempted to use a Section 8 voucher to pay her rent. When she received the voucher, she contacted her landlord about using it to pay her current rent. Although her landlord owned her apartment and managed numerous others, office staff claimed to be unfamiliar with Section 8. After weeks of failed attempts to resolve the matter with her landlord, Maria sought help from the CFHC. As a result of the Center’s intervention, not only was Maria able to keep her apartment, but her landlord was required to pay damages and attorney’s fees and undergo fair housing training.

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Bequest

The Connecticut Bar Foundation deeply appreciates the generous bequest from the estate of Catherine G. Roraback.

Grants 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 PAID
• AIDS Legal Network for Connecticut provides legal assistance to low-income people with HIV/AIDS.	\$ 53,573	\$ 3,279	\$ 14,595	\$ 71,447
• Center for Children's Advocacy provides legal advice to poor children statewide.	\$ 172,038	\$ 10,530	\$ 46,575	\$ 229,143
• Children's Law Center provides representation to poor children in Hartford, New Britain, and Windham Judicial Districts.	\$ 97,470	\$ 5,960	\$ 26,399	\$ 129,829
• Connecticut Fair Housing Center represents those who have been victims of housing discrimination.	\$ 101,694	\$ 6,209	\$ 27,687	\$ 135,590
• Connecticut Legal Rights Project represents low-income people in state psychiatric hospitals and after discharge.	\$ 348,678	\$ 21,361	\$ 94,651	\$ 464,690
• Connecticut Legal Services provides general legal assistance in all areas of the state except Hartford and New Haven counties.	\$ 3,919,536	\$ 240,029	\$ 1,063,271	\$ 5,222,836
• Greater Hartford Legal Aid provides general legal assistance in greater Hartford.	\$ 1,691,742	\$ 103,636	\$ 458,876	\$ 2,254,254
• Lawyers for Children America provides representation to poor children in Fairfield, Hartford, Middlesex, and New Haven Counties.	\$ 45,768	\$ 2,781	\$ 12,448	\$ 60,997
• New Haven Legal Assistance provides general legal assistance in New Haven County.	\$ 1,350,678	\$ 82,708	\$ 366,371	\$ 1,799,757
• Statewide Legal Services of Connecticut provides intake for low-income people and offers self help, brief service, and referrals to other legal services providers in the state.	\$ 130,002	\$ 20,267	\$ 35,414	\$ 185,683
• Technology Grant	\$ 64,108			\$ 64,108
LEGAL SERVICES TOTAL	\$ 7,975,287	\$ 496,760	\$ 2,146,287	\$ 10,618,334



“Rockville Bank has proudly supported the IOLTA program of the CBF at Leadership levels since its establishment and plans to continue at Leadership levels,” stated Rockville Bank President William J. McGurk.

“We recognize the need to fund legal aid for those in need, especially in this economic challenging time,” he added.

Technology Grant

The Connecticut Bar Foundation granted \$169,413 to the legal aid providers to plan and implement a website for Connecticut’s poorest residents and to upgrade the grantees’ hardware and software. The website will expand legal services for low-income residents by providing extensive, user-friendly information and documents in multiple languages. Links to other law related websites will be included.

Law School Scholarships

Quinnipiac University School of Law, the University of Connecticut School of Law, and Yale Law School each received \$20,000 from the Connecticut Bar Foundation’s IOLTA Law School Scholarship Program.

Bioethics and the Law Symposium

The *Bioethics and the Law Symposium. Legal and Ethical Issues at the End of Life: Confronting Incapacity and the Emerging Epidemic of Progressive and Chronic Dementias*, held October 2, 2009 at Quinnipiac University School of Law, was one of the Foundation's most successful symposia. Health professionals, ethicists, practicing lawyers, and legal experts discussed ethical and legal implications of end-of-life problems associated with progressive and chronic dementia. Subject areas for presentations and panel discussions included: assessing decision-making capacity at the very end-of-life; legal services; ethical guidelines and challenges; and dispute resolution, seeking solutions through mediation and other ADR methods. The speakers and panelists are writing articles for publication in the *Probate Law Journal*.



(l-r) Kate McEvoy, Susan Schmeiser, Suzanne Brown Walsh and Lea Nordlicht Shedd



Peter L. Costas



Hon. Barry R. Schaller

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Yale University
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Health Center
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Professor Bruce Jennings,
Director, Center for
Humans & Nature,
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for Molecular Medicine,
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of Medicine
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Stephen R. Latham
William Logue
Dean Jeremy R. Paul
Dean Brad Saxton
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Deborah J. Tedford
Suzanne Brown Walsh



Prof. Bruce Jennings and Prof. Ellen Waldman

James W. Cooper Fellows Activities

High School Essay Contest

The 2008-2009 state-wide high school essay contest topic was "Techno Trouble". Ninety Fellows served as judges. The winner received a \$3,000 savings bond and the two runners-up received \$1,500 savings bonds for educational use.



(l-r) William Logue, Hugh C. Macgill, Associate Justice Flemming L. Norcott, Associate Justice Peter T. Zarella, Emmett Gilles, Conard High School, Associate Justice Christine S. Vertefeuille, Kathleen Lynch, South Windsor High School, Brad Saxton, Mackenzie Schepman, Daniel Hand High School, Associate Justice C. Ian McLachlan, Andrea Barton Reeves

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 Peter Arakas
 Mark Carta
 Leo V. Diana
 Robert A. Harris
 William Logue
 Ann M. Siczewicz
 Jack G. Steigelfest
 Allan B. Taylor
 Martha S. Triplett

Oral History of Connecticut Women in the Legal Profession Project

Thirty-one women have been interviewed since the inception of the Oral History Project in 1999. Karyl Evans, a documentary filmmaker, is working with the Foundation to create short video clips to be streamed on the internet.

Committee Members

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

Mentoring Program

The Mentoring Program Subcommittee, the Connecticut Bar Association, and the New Haven County Bar Association developed a pilot mentoring program which pairs seasoned attorneys with new lawyers. Data will

be collected to assess the program, and a symposium will be planned. The Foundation is contributing \$5,000 for start up costs.

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

Truancy Intervention Project

The goal of the Truancy Intervention Project, a collaboration between the New Britain school system and volunteer attorneys,

is to keep middle school children in school. The project is funded primarily through a grant from the American Savings Bank Foundation with supplemental support from the Connecticut Bar Foundation, Connecticut Legal Services, and Children's Law Center. Between the Project's inception in 2007 and the close of 2009, fifty-two children were enrolled and fifty-six attorneys served as volunteers. Average monthly student absences decreased by 62%. Peter Arakas chairs the committee.



(l-r) Linda Greenhouse, Annual Reception speaker, with Rosemary E. Giuliano



(l-r) Norman K. Janes, recipient of the Legal Services Leadership Award, with Hugh C. Macgill at the Annual Reception



(l-r) Hon. Dawne Westbrook, Vanessa Roberts, Moy Ogilvie at the Annual Reception



(l-r) Christopher P. McCormack, Ralph J. Monaco, Francis J. Brady at the Annual Reception



(l-r) Hon. Leslie I. Olear, Hon. Antonio C. Robaina, Kathleen A. Dwyer at the Annual Reception

Financial Statements

CONNECTICUT BAR FOUNDATION, INC. Statement of Financial Position December 31, 2009

	2009
Assets	
Current assets:	
Cash and cash equivalents	\$ 890,577
Investments, at fair market value	5,634,516
IOLTA - receivables	357,951
Accounts receivable	54,126
Total current assets	<u>6,937,170</u>
Fixed assets:	
Leasehold improvements	2,680
Office furniture and equipment	95,417
Accumulated depreciation	<u>(90,629)</u>
Net fixed assets	<u>7,468</u>
Total assets	<u>\$ 6,944,638</u>
Liabilities and Net Assets	
Current liabilities:	
Accounts payable and accrued expenses	\$ 97,441
Total current liabilities	<u>97,441</u>
Net assets:	
Unrestricted	933,177
Temporarily restricted	<u>5,914,020</u>
Total net assets	<u>6,847,197</u>
Total liabilities and net assets	<u>\$ 6,944,638</u>

CONNECTICUT BAR FOUNDATION, INC. Statement of Activities and Changes in Net Assets For the year ended December 31, 2009

	2009
Changes in unrestricted net assets:	
Revenues and support:	
Net realized and unrealized gain (loss)	\$ 134,416
on investments	29,030
Dividends and interest	81,675
Fellows contributions	85,594
Contributions	7,070
Other income	<u>337,785</u>
Total revenues and support	<u>11,195,580</u>
Net assets released from program restrictions	<u>11,533,365</u>
Total revenues	<u>11,533,365</u>
Expenses:	
General and administrative	574,987
Grants and program	<u>10,737,897</u>
Total expenses	<u>11,312,884</u>
Changes in unrestricted net assets	<u>220,481</u>
Changes in temporarily restricted net assets:	
Revenues and support:	
IOLTA income	4,085,089
General Foundation - Speziale fund	5,511
Judicial Branch Grants-in-Aid	500,000
Court Fees Grants-in-Aid	2,208,365
Investment income:	
Dividends and interest	166,575
Net realized and unrealized gain (loss)	(71,064)
on investments	<u>(11,195,580)</u>
Net assets released from program restrictions	<u>(4,301,104)</u>
Changes in temporarily restricted net assets	<u>(4,301,104)</u>
Changes in net assets	<u>(4,080,623)</u>
Net assets, beginning of year	<u>10,927,820</u>
Net assets, end of year	<u>\$ 6,847,197</u>

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:

Annual Reception Sponsors

Event Sponsor

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- Connecticut Bar Association Elder Law Section
- Connecticut Bar Association Estates and Probate Section

Connecticut Bar Association
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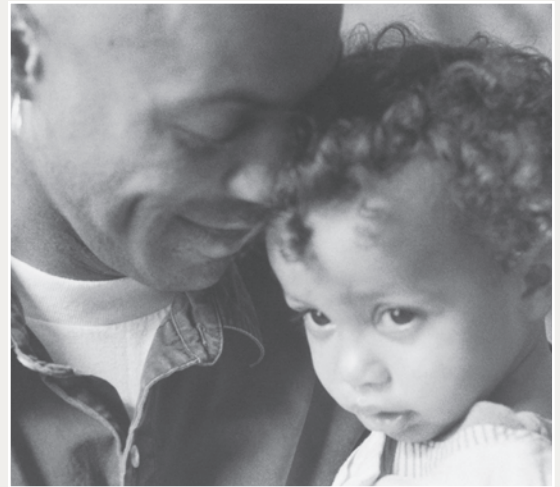
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Doreen Fundiller-Zweig and
Elliot C. Zweig, M.D.
in honor of Hon. A. Susan Peck

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Bequest

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Connecticut Bar Foundation Board of Directors



• **Seated (l-r)** Peter Arakas, Timothy S. Fisher, Hugh C. Macgill, Sandy Klebanoff, D. Larkin Chenault • **Back row (l-r)** Robert M. Langer, James T. Shearin, Christine O. Morgan, Ingrid L. Moll, Hon. Anthony V. DeMayo, Bruce R. Peabody, Quintin Johnstone, Brad Saxton, Frederic S. Ury, John R. Logan, Kate Stith, Ralph J. Monaco, Jeremy R. Paul, Hon. Raymond R. Norko, Amy Lin Meyerson, Joseph D. D'Alesio, Toni Smith-Rosario

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Report of President Hugh Macgill and Executive Director Sandy Klebanoff

IOLTA receipts hit an all time low in 2009, reduced to \$4,085,000 from \$20,764,522 in 2007, a reduction of 80.33%. This decrease, together with the loss of the \$1 million Judicial Branch Grants-in-Aid, caused the Foundation's Board of Directors to reduce IOLTA grants 50% and eliminate the state grant in the last two quarters. On the bright side, through the efforts of many friends and supporters of legal services for low income residents, the legislature and the governor helped meet this challenge by their approval of P.A. 09-152, which designates certain court fee increases for legal services. These funds provided \$2,208,365 in 2009 and are expected to generate over \$8 million in 2010.

As John G. Levi, Chairman of the LSC Board of Directors recently wrote, "In these challenging times, all of us in the legal profession must act so that justice is more than just an idea. Access to legal aid helps people maintain their livelihoods, helps victims of domestic

violence obtain protective orders, helps keep people in their homes and helps protect the elderly and others from being victimized."

Our thanks go to the hundreds of James W. Cooper Fellows who embody and support the Foundation's mission. The leadership, enthusiasm, and dedication of Peter Arakas, Dean Brad Saxton, and Bill Logue are an inspiration to all.

We thank Jim Bowers, Bev Hodgson, Norm Janes, Dean Harold Koh, John Motley, and Bill Narwold for their years of service on the board, and we look forward to working with new board members Livia Barndollar, Larkin Chenault, Amy Lin Meyerson, Ingrid Moll, Bruce Peabody, Dean Robert Post, and Tim Shearin. 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 legal services for low income people.

We survived this past year, with

the legal services agencies we support alive and vigorous (if a bit wounded), owing in significant part to the work of the Foundation's overextended and undercompensated professional staff. Their commitment and tireless labor, time and again, have kept the Foundation on track and effective.

Postscript from Hugh Macgill

Responsibility for giving away money, enviable to all appearances, becomes less enviable when the money dries up. The past two years has been a testing time. I leave the presidency grateful for the certainty that we passed that test, with a generous margin. "We?" All of us, the entire staff, lawyers, and legal services agencies whose vital role in the life of our state has ceased to be a secret, and the directors of the Foundation whose ability, commitment, and cohesion make the board a powerful force for social justice in Connecticut. I have had superb company these past two years and I will always be grateful for it.

The Connecticut Bar Foundation, 31 Pratt St., Hartford, CT 06103
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