

2024

Annual Report



About Us

The mission of the Colorado Bar Foundation (the Foundation) is to support justice through legal services and law-related education throughout Colorado. The Foundation is a 509(a)(3) Type 1 grant making and supporting organization to the Colorado Bar Association (CBA); the responsibilities of the Foundation are as defined in IRS Publication 557. All services and programs applying for grants from the Foundation are subject to the same application, review process and standards.

The annual contributions, donations, and estate gifts left to the Foundation are skillfully shepherded by the board to provide:

- Assistance with the provision or improved delivery of legal services by supporting the representation of
 individuals in court proceedings, furnishing advice to pro se litigants, and disseminating general information about various legal matters (including, but not limited to, domestic relation proceedings, probate and trust administration, estate planning, immigration, evictions, and bankruptcy)
- Promotion of law-related education to the public by supporting organizations that provide information and education about our American legal/justice system to community organizations and to school children of all ages
- Improvement of the administration of justice by supporting our courts and judicial officers, delivering
 accessible information about the Colorado court system, providing child-care for litigants and jurors,
 and assisting law enforcement and the judiciary in performing their functions

Foundation Management

Due to a cost-sharing agreement with the CBA, the Foundation is blessed to have a dedicated half-time manager, Elizabeth Akalin. Elizabeth has managed the Foundation for the past eight years, but her position was expanded in 2023 to allow her to focus solely on the Foundation, and to manage the expansion of development efforts, special events, and the bolstered grants portfolio. The Foundation is grateful for the support from the CBA that has enabled us to scale up operations to better support our community.

Letter from the Chairperson

It is my honor to serve again this year as the Chairperson of the Colorado Bar Foundation, the charitable arm of the Colorado Bar Association. This past year, the Foundation provided a record amount of funding to legal projects throughout the state. We are deeply grateful to all who make the work of the Foundation possible, particularly to our donors and supporters for their dedication and generosity. We would also like to extend a special note of appreciation to Ben Aisenberg for his legacy gift, which stands as a testament to his enduring support and belief in the Foundation's mission. Ben's generosity will have a lasting impact, ensuring that we can continue our vital work for years to come. Thank you once again to all our supporters and volunteers for your shared vision, trust, and partnership throughout 2024. We look forward to continuing our support of high-quality legal programs in 2025. Regards,

Connie Talmage

Chairperson of the Board of Trustees

Thank you for attending our 2nd annual Cajun Feast & Fundraiser



We were proud to host you for the annual Bar Fellows Dinner and CBA Awards Celebration



Board of Trustees

Connie Talmage, *Chairperson* Leia G. Ursery, *Vice Chairperson*

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Hon. Frances R. Johnson

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Jackie Booker Jennie Wray John M. Lebsack Joseph G. Hodges Jr.

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Hon. William G. Meyer

Bar Fellows Committee

As President of the Bar Fellows Committee, I want to extend my heartfelt gratitude to our Bar Fellows for your continued generosity and support of the Colorado Bar Foundation. Your commitment fuels our mission and helps us make a meaningful impact within our community. This year, we celebrated two hallmark events together. In June, we gathered for the annual Cajun Feast, complete with fresh boiled crawfish that I had the pleasure of preparing personally. In October, we hosted the Annual Bar Fellows Dinner and CBA Awards Celebration, where we honored David Stark, the 2024 Award of Merit recipient, and Sonia Russo, the 2024 Gary McPherson Outstanding Young Lawyer of the Year. These moments exemplify the camaraderie and dedication that define our Bar Fellows community. Thank you for making these events, and our shared mission, possible.

Regards, Keith Lapuyade Bar Fellows President of the Colorado Bar Foundation

Committee Members

Keith Lapuyade, Committee Chairperson and Bar Fellows President Andy Toft

Claire Hunter Connie Talmage Hon. Frances Johnson Gary Blum

Jennie Wray Loren Brown

Sarah Steinbeck Adelson

Scott Eldredge

Communications Committee

This year, the Communications Committee focused on developing our engagement with and expanding our outreach efforts to young lawyers across Colorado. By fostering this vital connection, we aim to inspire the next generation of legal professionals to become active participants in our mission. Additionally, we have enhanced the Foundation's social media presence by allowing all our grantees to share their missions and to highlight their community impact in our Foundation Friday posts. We remain committed to bringing quality communications to our community and spreading the word about the Foundation's positive influence. Your continued support enables us to highlight our collective efforts and amplify the message of justice and service throughout Colorado.

Regards, Leia Ursery Vice Chairperson of the Board of Trustees

Committee Members

Leia Ursery, Committee Chairperson and Vice Chairperson of the Board of Trustees Connie Talmage Craig Nuss Jennie Wray Loren Brown Rob Zentner Ted Tow

Finance Committee

On behalf of the Finance Committee, I am pleased to share that this year has been a pivotal one for the Colorado Bar Foundation. The Foundation continued to increase its endowment, and the Finance Committee exercised oversight in order to ensure that the Foundation stays well positioned for future growth and expansion of its charitable giving. We engaged national accounting firm Plante Moran to conduct a thorough review of our financial policies and procedures. Thanks to their expert guidance, we have proactively tightened and enhanced our cash handling, internal control protocols, and other accounting practices. These updates are designed to safeguard the Foundation's assets and bolster donor confidence, ensuring that we maintain the highest standards of financial stewardship. I am also delighted to highlight that the Foundation's invested assets reached an impressive milestone of \$10 million in the third quarter of the 2024 calendar year. This achievement reflects our collective commitment to sound financial management and the generous support of the Foundation's Fellows. Your trust enables us to continue the Foundation's important mission with confidence.

Regards,
C. Adam Foster
Treasurer of the Board of Trustees

Committee Members

Adam Foster, *Committee Chairperson and Treasurer*Charles Spence
Donald Alperstein
Jackie Booker

John Lebsack Marcy Glenn Joseph Hodges William Meyer

Governing Documents Revision Ad Hoc Committee

This year, the Board of Trustees undertook an important initiative to modernize the Colorado Bar Foundation's foundational documents. We revised our Articles of Incorporation and our Bylaws, as well as the governing Memorandum of Understanding with the Colorado Bar Association to better align our governance practices with contemporary standards and best practices. These updates ensure that the Foundation remains proactive in its adherence to IRS regulations governing 501(c)(3) nonprofit organizations and reinforces our commitment to operating with transparency and excellence. The revisions were accomplished with the invaluable guidance of Peter Schwartz, Samuel Goold, and Evan Williams of Davis Graham & Stubbs. We are extremely grateful to Davis Graham & Stubbs for their professional counsel and support and to the CBA for their continued partnership.

Regards,
Hon. Ted Tow III

Trustee of the Colorado Bar Foundation

Committee Members

Ted Tow, *Committee Chairperson*Adam Foster

Connie Talmage Joseph Hodges

Financial Information

The Colorado Bar Foundation receives funding from the following sources:

- Interest income earned from our endowment, valued at \$10,084,724.01 as of September 30, 2024.
- Donations made via the Bar Fellows program, which consists of individuals who have made a 10-year pledge, emeritus fellows who continue giving annually after completing their pledge, and <u>Aisenberg</u>
 <u>Society</u> and Aisenberg Pledge Program members.
- One-time donations from individuals and corporations.

2024 Grant Funding

Thanks to the generous Aisenberg estate gift received in 2022 and the continued support from our loyal donors, our grant funding continues to grow and, in 2024, we were able to notably increase total funds awarded and average grant size. We are thrilled to continue providing meaningful support to critical legal support nonprofits. In 2024 the trustees reviewed 95 grant applications and awarded the following:

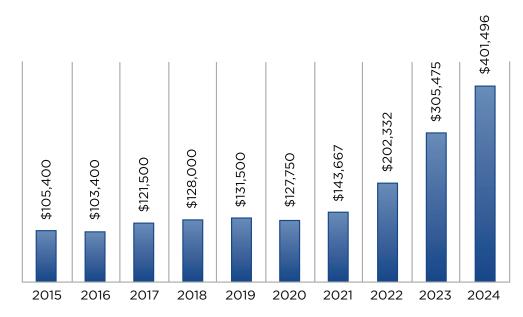
■ Total funds awarded: \$401,496

Average grant size: \$5,576

■ Total number of grants awarded: 72

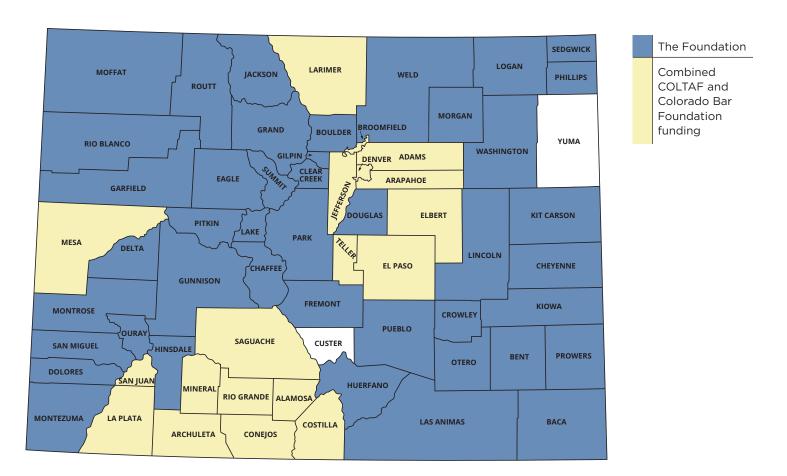
Percent of submitted applications that were awarded a grant: 76%

Grant Funding by Year



Geographic Impact

The Foundation strives to fund as many counties across the state as possible. Our grantees serve the following counties across Colorado:



In addition, the Colorado Bar Foundation funded 26 organizations that serve the entire state.

COLTAF Block Grant Program

<u>The Colorado Lawyer Trust Account Foundation (COLTAF)</u> program supports pro bono legal services by funding local legal aid and similar organizations that provide civil representation to economically disadvantaged residents across the state. It is funded by the interest earned on trust accounts held for Colorado attorneys.

Each year, the Colorado Bar Foundation provides funding to the COLTAF Pro Bono Grants program. This funding is used to bolster the amount of available grants made to bar-sponsored pro bono organizations and goes directly to the selected grantees. With this community partnership, grantees receive funding benefits from both the Colorado Bar Foundation and COLTAF while only needing to complete a single application.

In 2024, the Colorado Bar Foundation awarded COLTAF a block grant of \$40,000. This collaborative funding supported the following bar-sponsored pro bono organizations:

- Larimer County Bar Association
- The Justice Center
- Metro Volunteer Lawyers
- Pro Bono Project of Mesa County
- San Luis Valley Bar Association Pro Bono Project
- Volunteer Attorney Program

Colorado Bar Foundation 2024 Grantees

A Kid's Place DBA LifeStories Child & Family Advocacy: \$3,000

Provides advocacy and support for abused and neglected children by advancing coordinated investigations, prosecution and victim services.

A Woman's Place, Inc.: \$6,000

Shelters and empowers survivors of domestic violence to become safe, secure and self-reliant, and mobilizes our community through education and collaboration to prevent domestic violence.

Advocates for Victims of Assault, Inc.: \$4,000

Provides short term resources which enhances the safety and justice for survivors of domestic violence, sexual assault, and related traumas while promoting peace in our community through effective education and supportive programming.

Advocates of Lake County, Inc.: \$6,696

Provides trauma-informed services and promotes a community where individuals experiencing violence or housing insecurity may achieve personal autonomy.

The Alliance: \$3,000

Empowers individuals beyond domestic and sexual violence through services, education, and social change.

Alianza NORCO: \$3,000

Strengthens and empowers our immigrant community and their families through key services, civic education, leadership development and community organization.

The Arc of Southwest Colorado: \$3,800

Empowers individuals with intellectual and developmental disabilities and their families.

Aurora Arapahoe Battered Women's Shelter, DBA Gateway Domestic Violence Services: \$3,250

Prevents and eliminates intimate partner violence through counseling, residential services, court advocacy and empowering people for social change.

Better Tomorrow — Advocates of Routt County: \$2,000

Supports and empowers all people impacted by sexual violence and abusive relationships while disrupting all systems that tolerate and perpetuate such violence.

Better Tomorrow — Brighter World Child Advocacy Center: \$6,000

Elevates voices, facilitates safety, seeks justice, and promotes healing for children, teens, and other at-risk individuals who have been abused or neglected.

Blue Sky Bridge: \$3,000

Creates a lasting, positive change in the lives of children affected by abuse in Boulder County and beyond.

Bridge to Justice: \$5,000

Bridges the gap between legal needs and legal access with affordable, high quality legal services.

Bright Future Foundation for Eagle County: \$7,500

Makes Futures Bright for survivors and families affected by domestic violence, sexual assault, stalking, and human trafficking.

CASA of Adams & Broomfield Counties: \$3,000

Provides volunteer advocacy and support for at-risk children and youth, empowering families to thrive.

Casa Of Jefferson And Gilpin Counties: \$3,000

Provides trained volunteers to advocate in court on behalf of abused and neglected children.

CASA of Larimer County: \$3,000

Advocates for safe, nurturing, and permanent connections to family and community so children who have experienced abuse and neglect can thrive.

CASA of Mesa County: \$3,000

Provides a voice in court for victims of child abuse and neglect.

CASA of the Ninth: \$4,000

Provides well-trained, court-appointed volunteer advocates to abused and neglected children in Colorado's 9th Judicial District, and supports a safe, permanent, nurturing home for every child served.

CASA Of The Pikes Peak Region, Inc.: \$3,000

Provides a volunteer's voice in court for children who are victims of abuse, neglect or domestic conflict and promotes community awareness of these issues to ensure safe and permanent homes.

Catholic Charities Denver: \$3,000

Extends the healing ministry of Jesus Christ to the poor and those in need regardless of their background, race, ethnicity, religion, or life choices.

Catholic Charities of Central Colorado: \$3,000

Affirms the value and dignity of each human life, builds solidarity within the community, and advocates justice for the poor and vulnerable.

Child Advocates — Denver CASA: \$3,000

Advocates for the best interests of children who have experienced abuse or neglect by training diverse volunteers who create opportunities for children, youth, and families to thrive.

Colorado Access to Justice Commission: \$36,000

Expands access, quality, and fairness in the justice system for all Coloradans.

Colorado Bar Association — Pro Bono Programs: \$5,500

Provides access to justice by providing direct legal services to those in need across the State.

Colorado Bar Association — Colorado Diverse Attorney Community Circle: \$5,000

Seeks to build a community for diverse Colorado attorneys within the CBA and in the greater Colorado legal community while also giving them the tools to bring EDI training back to their employers.

Colorado Bar Association — High School Mock Trial: \$10,000

Builds the pipeline by teaching hundreds of high school students across the state about the judicial system while expanding their speaking, writing, reading, and analytical skills.

Colorado Business Committee for the Arts: \$4,500

Advances Colorado's creative economy by connecting business and the arts.

Colorado CASA: \$5,000

Strengthens local CASA programs and advocate for children in the child welfare system.

Colorado Center for Civic Learning and Engagement: \$5,000

Promote civic education programs in Colorado schools by providing professional development workshops for teachers, materials for classrooms, and civic events for students.

Colorado Children's Alliance: \$5,500

Through training, technical assistance, collaboration, and strategic partnerships, we strengthen our statewide efforts to fight all forms of child abuse.

Colorado Immigrant Justice Fund: \$3,000

Provides legal education and resources for immigrants who are seeking refuge and asylum or in a removal process with a focus on underserved areas.

Colorado Immigrant Rights Coalition: \$3,000

Builds community power through organizing and leadership development within immigrant communities, winning fair and humane public policies, providing legal services and educational workshops, and implementing nonpartisan civic engagement programs.

Colorado Lawyers Committee: \$5,000

Provides legal assistance and increase opportunities for children, the poor and other disadvantaged communities through advocacy, negotiation and litigation.

Colorado Lawyer Trust Account Foundation: \$40,000

Administers Colorado's Interest on Lawyers' Trust Accounts program to assist in providing legal services to the disadvantaged; to improve the delivery of legal services; to promote knowledge and awareness of the law in the community; and to improve the administration of justice.

Colorado Poverty Law Project: \$6,000

Prevents homelessness through legal representation, education, and advocacy.

Community College of Denver: \$5,000

Transforms lives and the Denver community by supporting the students of the Community College of Denver through scholarships, programs and facilities.

Compañeros: Four Corners Immigrant Resource Center: \$5,500

Empowers immigrants and their families through resource navigation, education and community engagement to achieve the vision of a diverse, empowered and liberated community of immigrants thriving in Southwest Colorado.

The Conflict Center: \$2,000

Equips people with practical skills to navigate, transform, and embrace everyday conflict.

Court Care for the Pikes Peak Region: \$6,000

Provides quality childcare in a safe, family friendly environment for the children of individuals who have court-related business.

Crossroads Safehouse: \$7,500

Shelters, supports, advocates for, and empowers all people so we can live free of domestic violence and interpersonal abuse.

Denver Asset Building Coalition: \$3,000

Provide free tax preparation, financial education, and other asset-building services in the Denver metro area to help low-income and underserved people become economically self-sufficient.

ECDC African Community Center: \$3,000

Helps immigrants and refugees rebuild safe, sustainable live in Denver.

Educating Children of Color: \$4,000

Dismantles the cradle-to-prison pipeline for children of color and children living in poverty through education.

Family Resource Center: \$6,000

Encourages the development of healthy children and strong family units by providing support systems, education, and referral services in rural northeastern Colorado.

Family Tree, Inc.: \$6,500

Partners with all people to prevent and overcome the interconnected issues of child abuse, domestic violence and homelessness to promote safety, healing, and stability across generations.

Florence Crittenton Services: \$3,000

Educates, prepares, and empowers teen mothers and their children.

Forge Evolution: \$7,500

Empowers youth and fosters resilient communities by inspiring accountability, empathy, and personal growth.

Foster Source: \$5,000

Provides relevant training, resources and support to foster and kinship parents from a trauma-informed approach, giving them the skills and confidence to spark healing in vulnerable children.

Hispanic Affairs Project: \$3,000

Promotes the integration of immigrants in Western Colorado through leadership development, advocacy, and providing essential services.

Hope House Colorado: \$3,000

Empowers parenting teenage moms to strive for personal and economic self-sufficiency and to understand their significance in God's sight, resulting in a healthy future for them and for their children.

Immigrant Legal Center of Boulder County: \$5,250

Provides affordable, reliable legal services for the immigrant community and to provide legal education regarding U.S. law, the U.S. immigration systems and immigrant rights.

Integrated Community: \$5,000

Assists and supports immigrants as they integrate, contribute, and maintain their independence in our northwestern Colorado community.

International Rescue Committee: \$5,000

The mission of the International Rescue Committee (IRC) is to help people whose lives and livelihoods have been shattered by conflict and disaster, including the climate crisis, to survive, recover, and gain control over their future.

Justice and Mercy Legal Aid Center: \$5,000

Seeks justice for those struggling with poverty and oppression in a way that affirms the client's dignity and strengthens their capacity to positively direct their own lives.

Korey Wise Innocence Project: \$6,000

Works with community volunteers, law students, multidisciplinary faculty, and volunteer attorneys to exonerate those persons wrongfully convicted in Colorado. We facilitate policy reform and promote discussion regarding contributing factors to wrongful convictions.

Laboratory to Combat Human Trafficking: \$3,000

Informs social change that eliminates human exploitation.

Mental Health Colorado: \$3,000

Create healthier minds across the lifespan for all Coloradans.

National Association of Counsel for Children: \$4.000

Advances children's and parents' rights by supporting a diverse, inclusive community of child welfare lawyers to provide zealous legal representation and by advocating for equitable, anti-racist solutions co-designed by people with lived experience.

Northwest Rocky Mountain CASA: \$5,000

Inspires, empowers, and educates the community and volunteers to advocate for the best interests of the child.

Project Safeguard: \$6,000

Empowers and partners with people who have experienced gender-based violence, helping them navigate a course of survivor-driven justice through expert, trauma informed legal advocacy and representation.

Rise Above Violence: \$5,000

Promotes the belief that all people have the right to live free from violence by providing support and advocacy services for victims and education for youth and our community.

Rocky Mountain Immigrant Advocacy Network: \$9,000

Serves low-income adults and children in immigration proceedings.

Rocky Mountain Veterans Advocacy: \$8,000

Provides legal advocacy and increasing access to legal services for veterans across the Rocky Mountain region by providing pro-bono or low-bono representation for discharge upgrades, VA benefits appeals, family law, and estate planning.

Rocky Mountain Victim Law Center: \$5,000

Elevates victims' voices, champions their rights, and transforms the systems impacting them.

Safe Passage: \$7,500

Gives abused children a voice and enables the healing process by acting as the single source of contact for medical, investigative, and legal services.

Safe Shelter of St. Vrain Valley: \$5,000

Provides safety, support, and resources to individuals affected by domestic violence, abuse in later life, and human trafficking.

Safehouse Progressive Alliance for Nonviolence: \$4,000

Ends violence against adults, youth, and children through support, advocacy, education, and community organizing.

Tri-County Health Network: \$7,000

Collaborates with our communities to improve health for all.

University of Denver: \$5,000

Promotes learning by engaging with students in advancing scholarly inquiry, cultivating critical and creative thought, and generating knowledge.

Voices for Children, CASA of Boulder County: \$3,000

Builds a healthier community by delivering services, support, and advocacy to children who have experienced trauma.

Women's Resource Center: \$5,000

The Women's Resource Center advocates for the personal empowerment and economic self-sufficiency of women and girls in La Plata County.

YouthZone: \$3,000

Provides comprehensive assessment and advocacy to inspire healthy relationships between youth, families, and communities.

Colorado Bar Foundation Balance Sheet

for Fiscal Year Ending June 30, 2024

	CURRENT FY	PREVIOUS FY
Assets		
CBF Checking US Bank	\$42,839	\$30,309
Fund Account	\$8,409,733	\$8,443,332
Fund Market Adjustment	\$1,485,551	\$566,588
Paintings	\$52,377	\$47,300
CV Accounts Receivable	\$2,585	\$510
Prepaid Expenses	\$1,277	\$0
Total Assets	\$9,994,362	\$9,088,039
Liabilities		
Owed to CBA for CBF Expenses	\$7,008	\$20,141
Accrued Paryoll	\$412	\$392
Deferred Income	\$11,900	\$0
Total Liabilities	\$19,320	\$20,533
Equity		
Unappropriated Surplus	\$9,071,305	\$8,176,038
YTD Revenue over Expenses	\$(8,579)	\$145,670
Unrealized Gain/Loss	\$912,316	\$745,796
Total Equity	\$9,975,042	\$9,067,505
Total Liabilities and Equity	\$9,994,362	\$9,088,038

Colorado Bar Foundation Income Statement

for Fiscal Year Ending June 30, 2024

	CURRENT FY	LAST FY
Revenues		
Pledges Bar Fellows	\$64,760	\$75,459
Emeritus Fellow Contributions	\$40,096	\$25,155
Event Income	\$16,410	\$12,523
Interest Income	\$239,591	\$268,314
Sponsorships	\$51,030	\$42,620
Contributions	\$2,381	\$27,113
Unrealized Gain or Loss	\$912,316	\$745,796
Total Revenue	\$1,326,585	\$1,196,980
Administrative Expenses		
Salary Staff Expense	\$(20,899)	\$(8,855)
Taxes Staff Expense	\$(1,902)	\$(850)
Benefits Staff Expense	\$(6,888)	\$(2,095)
Awards	\$(170)	\$0
Bank and Credit Card Fees	\$(43,932)	\$(43,315)
Travel	\$(219)	\$0
Office Supplies	\$(49)	\$0
Dues	\$(10)	\$(10)
Internet	\$(131)	\$0
Professional Services	\$(5,900)	\$(9,310)
Subscriptions	\$(10)	\$0
Events	\$(434)	\$(22,900)
Printing	\$(516)	\$0
Total Administrative Expenses	\$(81,041)	\$(87,335)

	CURRENT FY	LAST FY
Fundraising Expenses		
Other Expense Fall Event	\$(8)	\$0
Travel	\$(15)	\$0
Office Supplies	\$0	\$(53)
Office Supplies Fall Event	\$(322)	\$0
Postage	\$(462)	\$0
Professional Services	\$0	\$(340)
Entertainment	\$0	\$(2,010)
Entertainment Fall Event	\$(800)	\$0
Subscriptions	\$(1,800)	\$(2,400)
Spring Fundraiser	\$(5,483)	\$(2,528)
Spring Fundraiser Entertainment	\$(1,601)	\$(89)
Spring Fundraiser Supplies	\$(560)	\$(580)
Spring Funraiser Other Expenses	\$(2,000)	\$(795)
Fall Fundraiser	\$(23,631)	\$(4,655)
Total Fundraising Expenses	\$(36,682)	\$(14,147)
Program Expenses		
Subscriptions	\$(1,650)	\$(1,700)
Grants	\$(303,475)	\$(202,332)
Total Program Expenses	\$(305,125)	\$(204,032)
Total Expenses	\$(422,848)	\$(305,514)
Rev/Exp without gain or loss	\$(8,579)	\$145,670
Rev/Exp with gain or loss	\$903,737	\$891,467



If you would like information on how to support the Foundation, how to volunteer, or how to apply for funds, please visit www.coloradobarfoundation.org or contact eakalin@cobar.org



Service to others is the rent you pay for your room here on earth.

— Muhammad Ali

