

2023

ANNUAL REPORT

COLORADO BAR
FOUNDATION





“The Colorado Bar Foundation advances justice by supporting legal services and law-related education.”

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 grantmaking 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 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 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 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

2023 marks the 70th anniversary of the Colorado Bar Foundation. The Foundation looks forward to continuing to serve the Colorado legal community for decades to come.

Governance and Management

Due to a new cost-sharing agreement with the CBA, the Foundation expanded its staff support from a 0.20 full-time employee to a dedicated half-time manager and hired Elizabeth Akalin for this role. While Elizabeth has managed the Foundation for the past seven years, this newly expanded position has allowed 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 oper-

ations to better support our community. In 2023, the Foundation was served by a dedicated group of volunteers on the board of trustees and committees. Thank you to all the volunteers for your support of the Foundation.

Board of Trustees:

Connie Talmage, Chairperson
Leia Ursery, Vice Chairperson
Keith Lapuyade, Bar Fellows President
Adam Foster, Treasurer
Loren Brown, Trustee Emeritus
Gary Blum
Jackie Booker
Marcy Glenn
Joseph Hodges
Frances Johnson
John Lebsack
William Meyer
Craig Nuss
Charles Spence
Sarah Steinbeck Adelson
Ted Tow
Jennie Wray
Rob Zentner

Bar Fellows Committee: The Bar Fellows Committee is responsible for overseeing the Bar Fellows Program and organizing fundraising events to support the Foundation’s mission. The committee plays a crucial role in fundraising efforts by actively seeking donations and sponsorships to support the Foundations’ initiatives. It organizes the annual Bar Fellows Dinner and additional events that serve as key fundraising opportunities for the Foundation. The committee’s members work to ensure that the Foundation has the resources it needs to support its work and make a meaningful impact in the legal community.

Keith Lapuyade, Chairperson and Bar Fellows President
Gary Blum
Loren Brown
Scott Eldredge
Claire Hunter
Andy Toft

Communications Committee: The Communications Committee plays a vital role in raising the profile of the Colorado Bar

Foundation through various communication channels. The committee is responsible for developing and implementing communication strategies to increase awareness of the Foundation's work and achievements. Members work in conjunction with staff to develop messaging, create content, and disseminate information through social media, newsletters, and other communication channels.

Leia Ursery, Chairperson and Vice President

Loren Brown

Marcy Glenn

Craig Nuss

Connie Talmage

Ted Tow

Jennie Wray

Rob Zentner

Finance Committee: The Finance Committee plays a critical role in the Colorado Bar Foundation by drafting the annual budget, reviewing the investment portfolio, and assessing monthly financial statements. The committee's members are tasked with overseeing the Foundation's financial health and ensuring its long-term sustainability. The committee works closely with representatives from the Foundation's bank to make informed recommendations to the Foundation's board of trustees.

Adam Foster, Chairperson and Treasurer

Donald Alperstein

Jackie Booker

Joseph Hodges

John Lebsack

William Meyer

Charles Spence

Financial Information

The Colorado Bar Foundation receives funding from the following sources:

- Investment income earned from its endowment, valued at \$8,568,232 as of September 30, 2023.
- 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 pledges, and Aisenberg Society and Aisenberg Pledge Program members.
- One-time donations from individuals and corporations.

In 2022, the Foundation received a gift of \$5.2 million from the Estate of Ben Aisenberg, which has drastically increased its grantmaking capabilities. The Foundation's grant allowance is calculated on a rolling 12-quarter average. Therefore, a substantial increase in grant funding is expected in 2024.

Donor Development and Bar Fellowship

This year, the The Foundation launched a program to expand and enhance the Aisenberg Society. Bar Fellows who contribute a total of \$10,000 to the Foundation are honored as members of the Aisenberg Society, whose namesake is Bennett S. Aisenberg. Fellows can now pledge towards Aisenberg Society status via individually customized pledge increments. This initiative is expected to further bolster the Foundation's grantmaking capabilities.

The The Foundation hosted the inaugural Cajun Feast & Fundraiser in June. Located at the scenic Boathouse in Denver's Wash Park, this event brought together members of the legal community in a festive setting. They hosted representatives of grantees Mi Casa Resource Center, Forge Evolution, Delta ETA Boule Foundation, Colorado Business Committee for the Arts, and Hope House Colorado as guests at our feast.



In September, the The Foundation was honored to host the annual Bar Fellows Dinner and presentation of CBA awards. This event celebrated Bar Fellowship and honored CBA Award of Merit recipient Fay Matsukage, Gary McPherson Outstanding Young Lawyer of the Year Award recipient Jackson Laughlin, and In-Memoriam Award recipients Richard Holme and James Wade. They were joined by representatives of grantee guests Rocky Mountain Immigrant Advocacy Network, Educating Children of Color, A Woman's Place, CASA of Jefferson and Gilpin Counties, and Law School... Yes We Can.

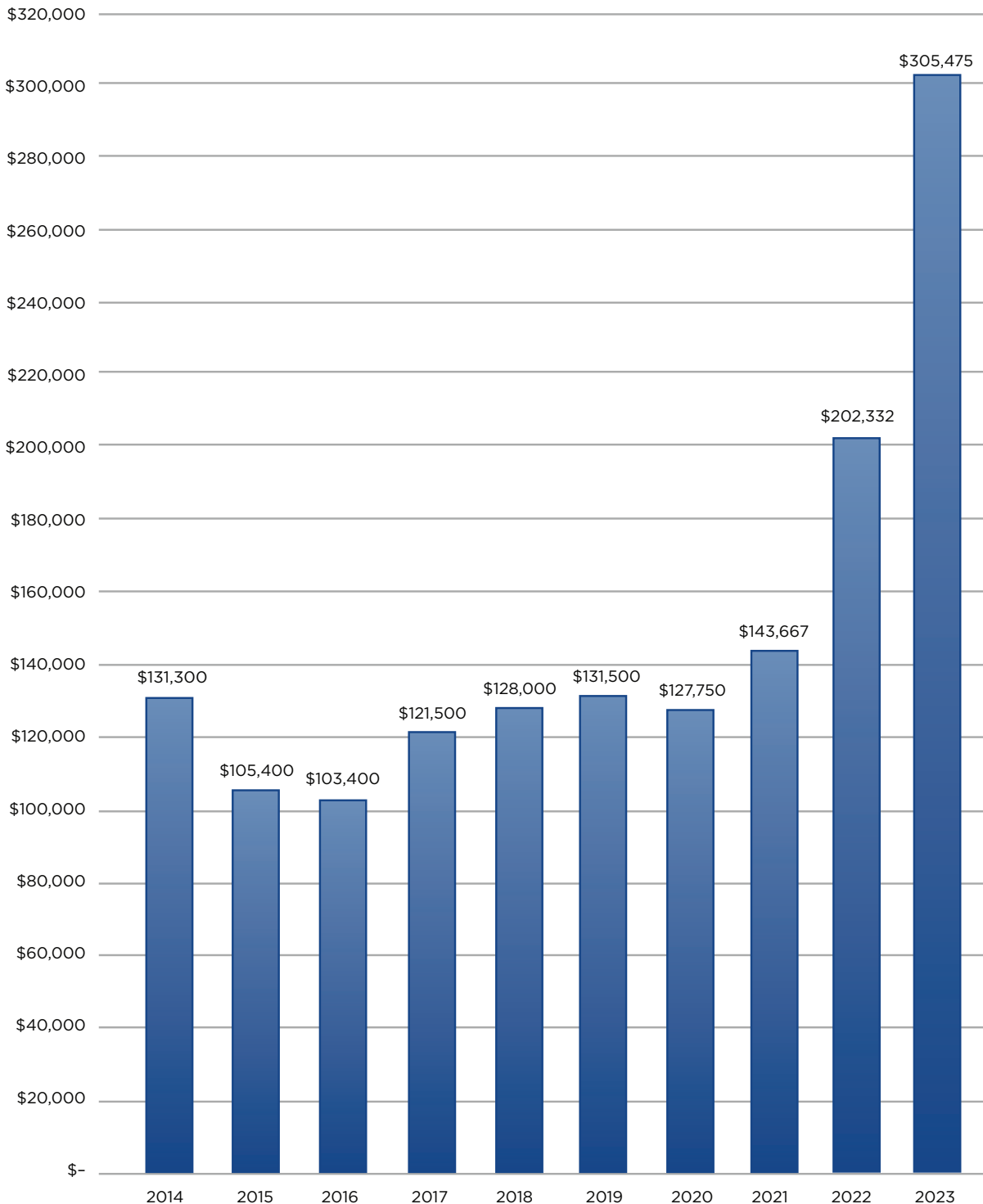


**Thank you to our Colorado Bar Fellows
for their continued support.**

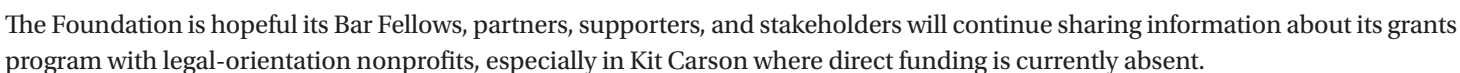
2023 Grant Funding

Substantial efforts were made to increase the visibility of the The Foundation's grant program in 2023. This year it received a record high of 101 applications, compared to 56 applications in 2022.

- Total funds awarded: \$305,475
- Average grant size: \$4,364
- Total number of grants awarded: 70
- Percent of submitted applications that were awarded a grant: 69%



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



COLTAF Block Grant Program

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.

- Alpine Legal Services
- CLS of Boulder
- Larimer County Bar Association
- The Justice Center
- Metro Volunteer Lawyers
- NW Colorado Legal Services
- Pro Bono Project of Mesa County
- CLS Pueblo County Pro Bono Project
- San Luis Valley Bar Association Pro Bono Project
- Volunteer Attorney Program
- Uncompahgre Volunteer Legal Aid
- Weld County Legal Services

Colorado Bar Foundation 2023 Grantees

12th Judicial District Access to Justice: \$4,000

Expands access, quality, and fairness in the justice system for those living or working in the 12th Judicial District.

22nd Judicial District Access to Justice Committee: \$4,000

Expands access, quality, and fairness in the justice system for those living or working in the 22nd Judicial District.

A Kid's Place DBA LifeStories

Child & Family Advocacy: \$2,000

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

A Woman's Place, Inc.: \$5,000

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

Access to Justice — 8th JD: \$4,000

Expands access, quality, and fairness in the justice system for those living or working in each respective region.

AdvocacyDenver: \$3,000

Promotes and protects the human rights of people with disabilities and actively supports their full inclusion and participation in the community throughout their lifetimes.

Advocates for Victims of Assault, Inc.: \$2,000

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

Advocates of Lake County, Inc.: \$5,925

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

ATJ Committee 10th JD: \$4,000

Expands access, quality, and fairness in the justice system for those living or working in the 10th Judicial District.

Aurora Arapahoe Battered Women's Shelter,

DBA Gateway Domestic Violence Services: \$2,000

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

Better Tomorrow — Child Advocacy Center Program: \$2,000

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

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Advocates of Routt County Program: \$2,000

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

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: \$5,000

Making Futures Bright: changes lives impacted by domestic violence, sexual assault, stalking and human trafficking.

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

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

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.

Center for Legal Inclusiveness: \$5,050

Advances diversity in the legal profession by actively educating and supporting private and public sector legal organizations in their own individual campaigns to create cultures of inclusion.

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: \$4,000

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

Colorado Bar Association — COBALT Program: \$2,500

Enhances, promotes, and inspires the leadership of the legal profession.

Colorado Bar Association — CODACC Program: \$2,500

Builds a community for diverse Colorado attorneys.

Colorado Bar Association — Pro Bono Programming: \$4,000

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

Colorado Bar Association —**Colorado High School Mock Trial Program: \$7,500**

Creates an environment for hundreds of high school students across the state to learn about the judicial system while expanding their speaking, writing, reading, and analytical skills.

Committee for the Arts: \$4,000

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

Colorado CASA: \$5,000

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

Colorado Immigrant Justice Foundation: \$3,000

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

Colorado Name Change Project: \$2,000

Increases access to resources, provides accurate information, reduces the bureaucracy, streamlines the process, and reduces financial barriers for transgender Coloradans seeking to have their legal identity match their true identity.

Colorado Poverty Law Project: \$3,000

Prevents homelessness through legal representation, education, and advocacy.

Colorado Springs Teen Court: \$6,500

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

COLTAF: \$30,000

Assists 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.

Compañeros: Four Corners**Immigrant Resource Center: \$4,000**

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

Court Care for the Pikes Peak Region: \$5,000

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

Crossroads Safehouse, Inc.: \$7,500

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

Delta Eta Boule Foundation: \$3,000

Identifies, nurtures, and develops the next generation of Black leaders.

Educating Children of Color: \$4,000

Through education, dismantles the cradle-to-prison pipeline for children of color and children living in poverty.

Expunge Colorado: \$1,000

Provides education, awareness, and access to pro bono record sealing legal services, and removes barriers to employment and housing.

Family Resource Center: \$4,000

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.: \$5,000

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

Foster Source: \$4,000

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 key services.

Hope House Colorado: \$3,000

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

Immigrant Legal Center of Boulder County: \$5,000

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

Integrated Community: \$2,500

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

Juntos Community: \$2,000

Helps undocumented families who have DACA learn how to renew and submit their work permits so they can be self-sufficient and self-advocates.

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

Seeks justice for those who struggle with poverty and oppression.

Korey Wise Innocence Project: \$5,000

Works with community volunteers, law students, multidisciplinary faculty, and volunteer attorneys to exonerate those persons wrongfully convicted in Colorado.

LAW SCHOOL...Yes We Can: \$7,500

Provides BIPOC and members of underserved communities with economic opportunities through professional training, mentorship, and networking to contribute to a more diverse and racially equitable Colorado workforce.

Mi Casa Resource Center: \$2,000

Advances economic prosperity of the Latino community.

National Association of Counsel for Children: \$5,000

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: \$3,000

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

PeaceWorks, Inc.: \$4,000

Advocates for all survivors, their children and companion animals, of intimate and non-intimate partner violence.

Project Safeguard: \$4,000

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.

Realness Project: \$2,500

Transforms the culture of incarceration by empowering human connection.

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 Children's Law Center: \$3,500

Advocates for children and youth, drives systemic reform, and boldly challenges the status quo so that every young person who has experienced trauma or instability has the opportunity to thrive.

Rocky Mountain Immigrant Advocacy Network: \$7,500

Serves low-income adults and children in immigration proceedings, and promotes knowledge of legal rights, provides effective representation to ensure due process, works to end immigration detention, and promotes a more humane immigration system.

Rocky Mountain Legal Center: \$5,000

Provides free and low cost direct legal services to individuals and families with an emphasis on preventive law and education.

Rocky Mountain Veterans Advocacy: \$5,000

Provides legal advocacy and increases 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: \$4,000

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

Safe Passage: \$6,000

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

Promotes empowerment through direct services and community education, advocating for the right of every individual to live a life free of intimidation.

Safehouse Progressive Alliance for Nonviolence: \$2,500

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

SAFER Colorado: \$4,000

Disentangles mental health and criminal justice to improve health outcomes, save taxpayer dollars, and enhance community well-being.

San Luis Valley Immigrant Resource Center: \$3,500

Connects and empowers immigrants with resources to achieve legal documentation, fulfill their economic needs, and integrate into the community.

SWCO Pro Bono Coordinator Program: \$3,500

Expands access, quality, and fairness in the justice system for those living or working in the 6th Judicial District.

The Conflict Center: \$3,000

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

Tri-County Health Network: \$7,000

Collaborates with our communities to improve health for everyone.

University of Denver — Tribal Wills Project: \$5,000

Provides free wills and related documents to tribal members on reservations.

Women's Resource Center: \$4,000

Advocates for the personal empowerment and economic self-sufficiency of women and girls in La Plata County.

Colorado Bar Foundation Balance Sheet

for Fiscal Year Ending June 30, 2023

	CURRENT FY	PREVIOUS FY
Assets		
The Foundation Checking US Bank	\$30,309	\$21,857
Fund Account	\$8,443,332	\$8,050,258
Fund Market Adjustment	\$566,588	\$70,791
Paintings	\$47,300	\$47,300
CV Accounts Receivable	\$510	\$4,100
Total Assets	\$9,088,038	\$8,194,306
Liabilities		
Owed to CBA for the Foundation Expenses	\$20,141	\$444
Accrued Payroll	\$392	\$0
Deferred Income	\$0	\$17,825
Total Liabilities	\$20,533	\$18,269
Equity		
Unappropriated Surplus	\$8,176,038	\$4,085,091
YTD Revenue over Expenses	\$145,670	\$5,444,486
Unrealized Gain/Loss	\$745,796	\$(1,353,540)
Total Equity	\$9,067,505	\$8,176,038
Total Liabilities and Equity	\$9,088,038	\$8,194,306

Colorado Bar Foundation Income Statement

for Fiscal Year Ending June 30, 2023

	CURRENT FY	LAST FY
Revenues		
Pledges Bar Fellows	\$75,459	\$55,133
Emeritus Fellow Contributions	\$25,155	\$27,869
Event Income	\$12,523	\$0
Interest Income	\$268,314	\$294,896
Sponsorships	\$42,620	\$0
Contributions	\$27,133	\$5,254,974
Unrealized Gain or Loss	\$745,796	\$(1,353,540)
Total Revenue	\$1,197,000	\$4,279,332
Administrative Expenses		
Salary Staff Expense	\$(8,855)	\$0
Taxes Staff Expense	\$(850)	\$0
Benefits Staff Expense	\$(2,095)	\$0
Awards	\$0	\$(197)
Bank and Credit Card Fees	\$(43,315)	\$(36,700)
Dues	\$(10)	\$(70)
Uncollectible AR/Write offs	\$0	\$(2,850)
Professional Services	\$(9,310)	\$(3,100)
Events	\$(22,900)	\$0
Printing	\$0	\$(78)
Total Administrative Expenses	\$(87,335)	\$(42,995)

	CURRENT FY	LAST FY
Fundraising Expenses		
Office Supplies	\$(53)	\$(24)
Postage	\$(697)	\$(21)
Professional Services	\$(340)	\$(179)
Entertainment	\$(2,010)	\$0
Subscriptions	\$(2,400)	\$0
Spring Fundraiser	\$(2,528)	\$0
Spring Fundraiser Entertainment	\$(89)	\$0
Spring Fundraiser Supplies	\$(580)	\$0
Spring Funraiser Other Expenses	\$(795)	\$0
Fall Fundraiser	\$(4,655)	\$0
Total Fundraising Expenses	\$(14,147)	\$(224)
Program Expenses		
Subscriptions	\$(1,670)	\$(1,500)
Grants/Contributions	\$(202,332)	\$(143,667)
Total Program Expenses	\$(204,002)	\$(145,167)
Total Expenses	\$(305,514)	\$(188,385)
Rev/Exp without gain or loss	\$145,670	\$5,444,486
Rev/Exp with gain or loss	\$891,467	\$4,090,947



Thank You

Thank you to all of our Bar Fellows, volunteers, and supporters.

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