



National Conference of Bar Foundations

*“The State of Bar Foundations:
2010 Cumulative Impact Survey”*



www.foundationsservices.com



September 17, 2010

To: Tom Tinder, President, National Conference of Bar Foundations (NCBF)
Steve Chappellear, President-Elect, NCBF
Courtney Ward-Reichard, Treasurer, NCBF
Renee DeMoss, Secretary, NCBF
Christine Hickey, Immediate Past President, NCBF
Board of Trustees, NCBF
Roseanne Lucianek, ABA Staff Liaison, Division of Bar Services

From: Kim McKelvey, Executive Director, ALPS Foundation Services

Re: Report on NCBF Survey “The State of Bar Foundations: 2010 Cumulative Impact Survey”

ALPS Foundation Services is pleased to submit its report on the “The State of Bar Foundations: 2010 Cumulative Impact Survey” (Survey). The primary purpose of the biennial survey is to track common trends bar foundations and other legal foundations have had on communities nationwide during the reporting period.

The services National Conference of Bar Foundations (NCBF) provides to its members play an integral part in advancing the work of bar foundations by strengthening each individual bar foundation and in turn, each bar foundation’s community. The Survey is intended to enhance NCBF’s mission by providing NCBF members and Survey participants with an in-depth analysis and comparison of data related to the revenue, distributions, value, and impact of bar foundations and other legal foundations nationwide.

In 2010, NCBF contracted with ALPS Foundation Services to conduct a national survey of bar foundations. A five-member Survey Committee was formed to provide general oversight in the process. Committee members included David Gee, Christine Hickey, Tom Tinder, and Briana Wagner, NCBF Officers, and Roseanne Lucianek, ABA Staff Liaison, Division Bar Services. Based on the 2008 “The State of Bar Foundations” Survey Part I – Cumulative Impact Analysis, the Committee created a similar survey with additional questions geared toward the recent economic downturn.

This report begins with a comparative analysis of the information gathered in 2008 and 2010. The comparative analysis is followed by an overview of Survey respondents by type and size of related bar associations, and an overview of the missions, revenue, and distributions of bar foundations and other legal foundations. In the Appendix, you will

find the survey request email sent to 230 bar foundations, a list of respondents, and the Survey questions.

ALPS Foundation Services and NCBF express their sincere appreciation to participating foundations that gave their valuable time and information in responding to the Survey. In addition, we wish to thank the NCBF Survey Committee members for their time in working with ALPS Foundation Services to identify Survey subject areas of inquiry and review report drafts. We are especially grateful to Roseanne Lucianek and her staff for their support during this project, including their diligent efforts to encourage foundations to respond to the Survey.

Thank you for allowing us to share in your work.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Kim McKelvey", with a horizontal line extending to the right.

Kim McKelvey
Executive Director, ALPS Foundation Services

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I. EXECUTIVE SUMMARY

From March to July, 2010, the National Conference of Bar Foundations (NCBF) conducted a survey of foundations¹ nationwide. “The State of Bar Foundations: 2010 Cumulative Impact Survey” (Survey) focused on the areas of value and impact, number of related bar association members, revenue generated, distribution of funds, economic changes, and collaboration. The responses were analyzed to gather comprehensive data related to the work and overall impact of bar foundations and other legal foundations nationwide, as well as compare the results of the 2008 survey to present day results.

Bar foundations and other legal foundations are the visible charitable arms for bar associations and for the legal community. Foundations provide a mechanism for organized contributions to legal causes from related bar association members, the legal community, and the general public. Foundations generate revenue from a variety of sources, including donations from the legal community and general public, Interest on Lawyer Trust Accounts (IOLTA), and endowments.

The report indicates significant findings for bar foundations nationwide over the past two years. Some key findings include:

- In 2009, responding foundations distributed \$192 million toward law-related causes through grants, scholarships, loan repayment assistance, and other programs.
- In 2009, state foundations distributed \$179 million and local/county foundations distributed \$13 million in grants to their communities.
- Foundation revenue decreased by 66% between 2007 and 2009.
- In 2009, bar foundations generated \$17.5 million in revenue and IOLTA foundations generated \$47 million in revenue.
- In 2007, foundations with annual revenue of \$10 million or more distributed 60% of their revenue. Foundations in the same revenue category distributed 600% of their revenue in 2009.
- In 2007, lawyer giving accounted for 6% of the total revenue generated for foundations and accounted for the largest portion of revenue (69%) for foundations with revenue between \$20,000 and \$99,999. In 2009, lawyer giving accounted for 22% of the total revenue generated for foundations, but decreased as a portion of revenue for foundations with revenue between \$20,000 and \$99,999 to 46%.
- Foundations with revenue under \$1 million generated much higher percentages from lawyer giving: 52% for foundations with revenue between \$100,000 and \$999,999, 46% for foundations with revenue between \$20,000 and \$99,999, and 78% for foundations with less than \$20,000 in revenue. In comparison,

¹ For the purposes of the NCBF Survey, a foundation is a bar foundation, IOLA foundation or IOLTA foundation. Legal foundations formed for the primary purpose of funding internal programming (e.g. legal services foundations, legal advocacy program foundations) are not included in the term “foundation.” The Survey was sent to 230 foundations that met the definition of foundation.

- foundations with revenue over \$1 million generated 15% of their revenue from lawyer giving.
- In 2009, foundations distributed less than 5% of their available funds to law-related education grants, whereas in 2007 foundations distributed less than 10% of their funds to law-related education grants.
 - 5% of foundations responding in 2007 had revenue less than \$20,000; 12% of respondents in 2009 reported having revenue less than \$20,000.

While both bar and IOLTA foundations² saw a decrease in revenue, they were still able to maintain relatively strong distribution levels and further their missions. Bar foundations in 2009 were able to improve donations from lawyers and IOLTA foundations were able to use their reserves to maintain a level of distributions that was 88% of 2007 distributions.

During an economy that had substantial impact on foundations, the resiliency displayed by foundations significantly impacted their communities. As a result, foundations were able to continue supporting law-related causes through grants to access to justice programs, law-related education programs, law-related charitable projects, and provide scholarships and loan repayment assistance.

² For the purposes of this survey, an IOLTA foundation is a bar foundation, legal foundation, or program that administers IOLTA funds.

II. COMPARATIVE ANALYSIS

Between 2007 and 2009, legal foundations saw a significant decrease in revenue and slight decrease in grant distribution. Despite these decreases, foundations were able to maintain adherence to their missions and still impact their communities.

Revenue

Foundation revenue increased by 182% between 2005 and 2007 and decreased by 66% between 2007 and 2009. This significant loss in income demonstrates the poor economic climate over the past two years and its dramatic effect on legal foundations.

From 2007 to 2008, 6% of foundations reported revenue over \$10 million, yet in 2009 there were only two foundations that reported revenue over \$2 million. 5% of foundations responding in 2008 had revenue less than \$20,000; 12% of respondents in 2010 reported having revenue less than \$20,000.

In 2007, foundations with revenue less than \$20,000 saw a decline in revenue by nearly 40%. Just the opposite was reported in 2009, as foundations with revenue of \$20,000 or less in 2009 saw an increase of revenue by 30%. Foundations with revenue of \$10 million or greater in 2007 saw a nearly 60% decrease in revenue in 2009.

From 2007 to 2009, foundations experienced declines in revenue whether or not they are bar or IOLTA foundations. In 2009, bar foundations generated \$17.5 million and IOLTA foundations \$47 million in revenue. Bar foundations saw a decrease of 23% from 2007 to 2009 and IOLTA foundations saw a decrease of 59% for those same years.

In 2007, lawyer giving accounted for 6% of the total revenue generated for foundations and accounted for the largest portion of revenue (69%) for foundations that generated revenue between \$20,000 and \$99,999. In 2009, lawyer giving accounted for 22% of the total revenue generated by bar foundations, and only 46% of the total revenue for foundations with total revenue from \$20,000 and \$99,999.

Distribution

While the economic climate over the past three years caused the drastic reduction of revenue for many foundations, distributions remained relatively strong. Foundations responding to the survey distributed \$192 million in 2009, more than twice their revenue. The discrepancy between revenue and grant distribution is likely due to IOLTA foundations utilizing their reserves to compensate for lost revenue.

Of the \$192 million distributed in 2009, bar foundations are responsible for 7% and IOLTA foundations 93% of overall distributions. In 2007, bar foundations distributed 17% and IOLTA foundations 83% of total distributions.

IOLTA foundations lost large portions of their revenue and were forced to cut the majority of their funding except to grants to which they had previous obligations. The

ability to maintain these grants demonstrates the importance of reserve funds. On the other hand, bar foundations lost revenue from 2007 to 2008 and their revenue increased from 2008 to 2009. These foundations were able to maintain revenue largely from donations.

In 2007, foundations with annual revenue of \$10 million or more distributed 60% of their revenue. Foundations in the same revenue category distributed 600% of their revenue in 2009. In 2007, foundations that had revenue between \$20,000 and \$999,999 distributed 90% of their revenue. Foundations in the same revenue category distributed 39% of their revenue in 2009.

Local/county foundations distributed 45% of their revenue in 2007. Local /county foundations distributed 106% of their revenue in 2009. State foundations distributed 50% of their revenue in 2007 and distributed 344% of their revenue in 2009.

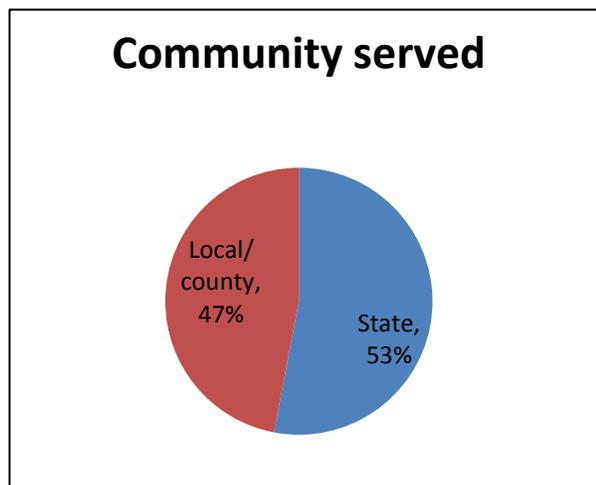
Grants make up the majority of distributions for all types of foundations in all revenue categories for both 2007 and 2009. In 2009, foundations distributed less than 5% of their available funds to law-related education grants, whereas in 2007 foundations distributed less than 10% of their funds to law-related education grants.

III. OVERVIEW OF FOUNDATIONS

A. Local/county, state, IOLTA

47% of foundations responding to the Survey classified themselves as local/county foundations, and 53% classified themselves as state foundations.

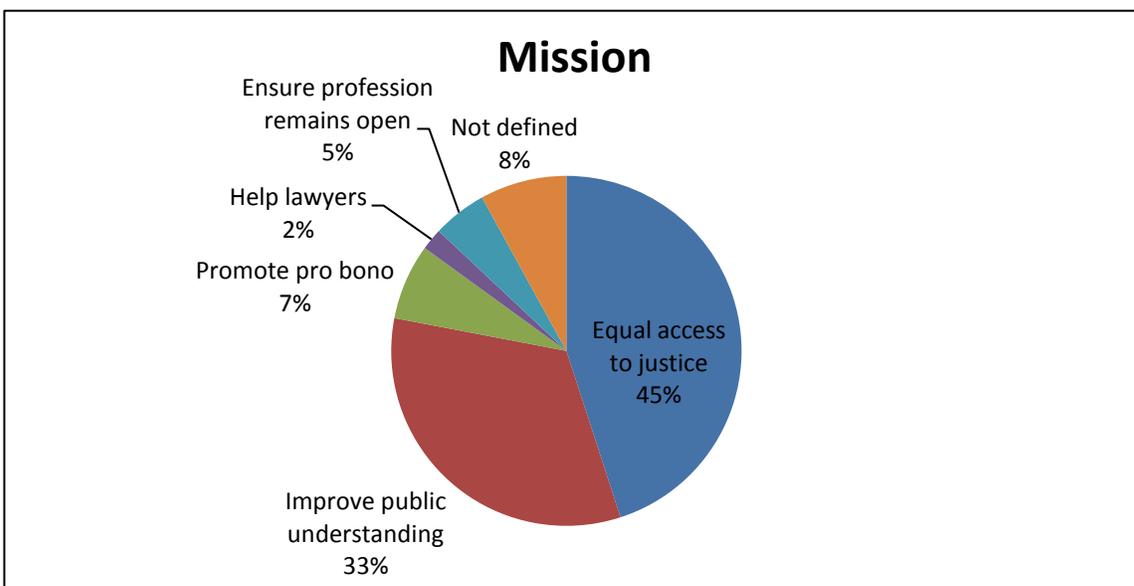
Of the 58 respondents to the Survey, 22 foundations indicated they administer Interest on Lawyers Trust Account (IOLTA) funds.



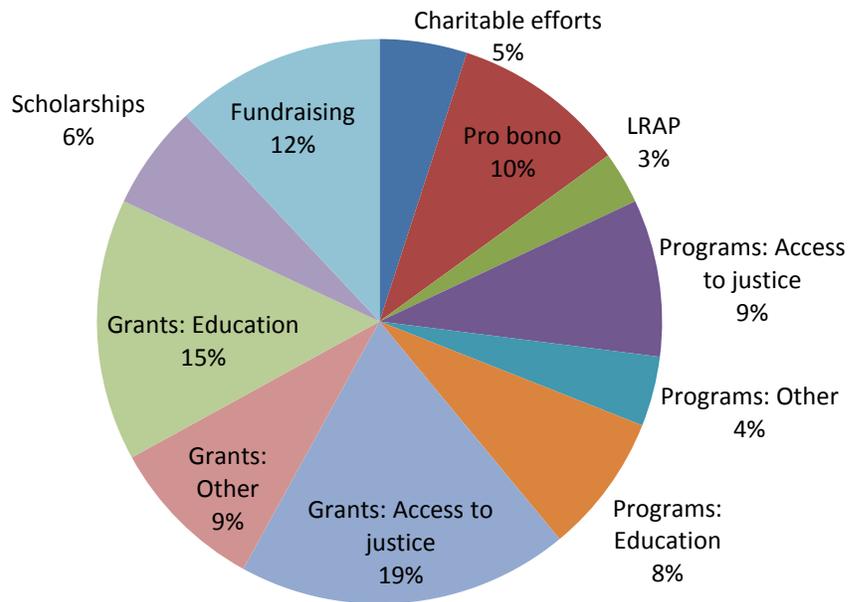
B. Value and impact

1. Mission

45% of foundations listed “ensure equal access to justice” as their primary mission. Another 33% chose “improve public understanding of the law and the justice system” as their primary mission. 7% reported promoting *pro bono* work in the legal community. 2% said that “ensure the legal profession remains open to people from all walks of life” is their primary mission. Another 5% said their primary mission is to “help lawyers who are experiencing difficulties.” The remaining 8% stated other primary missions that mainly focus on supporting lawyers and low-income people who cannot afford legal services.



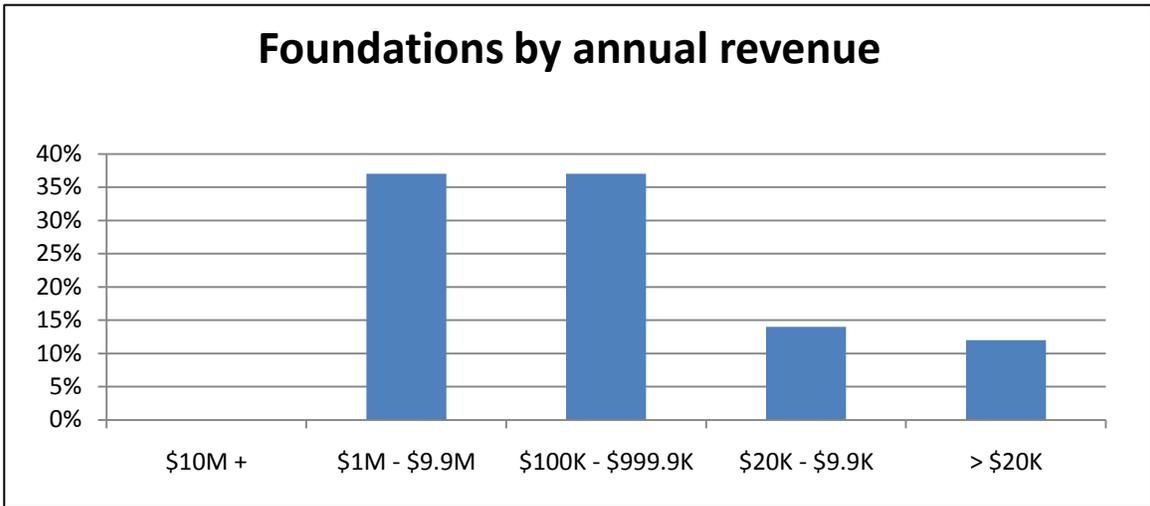
How foundations accomplish their missions



43% of foundations accomplish their missions through grant distribution. Only 12% of foundations reported accomplishing their missions through fundraising, though many foundations may have assumed fundraising was implicit in their other activities. Encouraging *pro bono* activity and providing scholarships account for 10% and 6% respectively. 23% of foundations provide their own programs, including access to justice, education, and other programs.

2. Overview of revenue generated

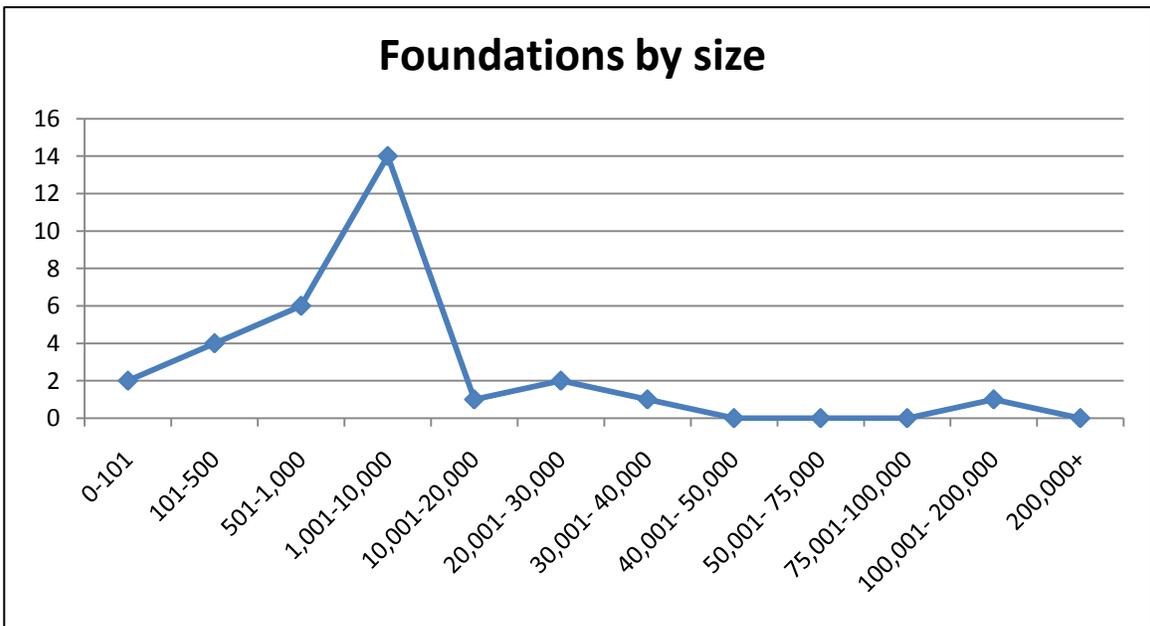
Responding foundations generated \$192 million in revenue in 2007, \$144 million in 2008, and \$64.5 million in 2009. No foundations reported revenue over \$8 million in 2009. 12% of foundations reported revenue of \$20,000 or less. In the middle range, 12% reported revenue between \$20,000 and \$99,999, 37% generated revenue between \$100,000 and \$999,999, and 37% generated revenue between \$1 million and \$10 million.



C. Number of related bar association members

The average foundation’s related bar association has between 1,001 and 10,000 members. Out of the 31 responses to the question, “How many members are in your bar foundation’s related bar association?” 45% fall into this narrow middle range.

Only 2 of the Survey respondents’ related bar association have fewer than 101 members. On the other end, 1 respondent recorded having over 100,000 members.



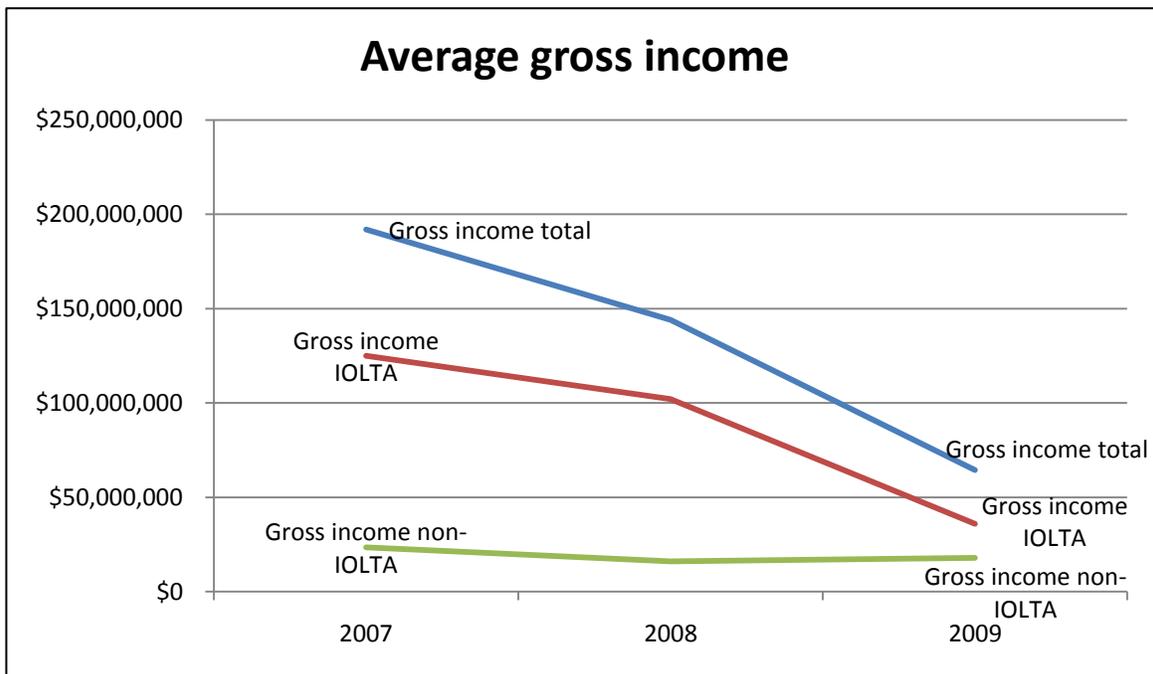
IV. ANALYSIS OF FOUNDATION REVENUE AND DISTRIBUTION

A. Revenue generated

1. Overview

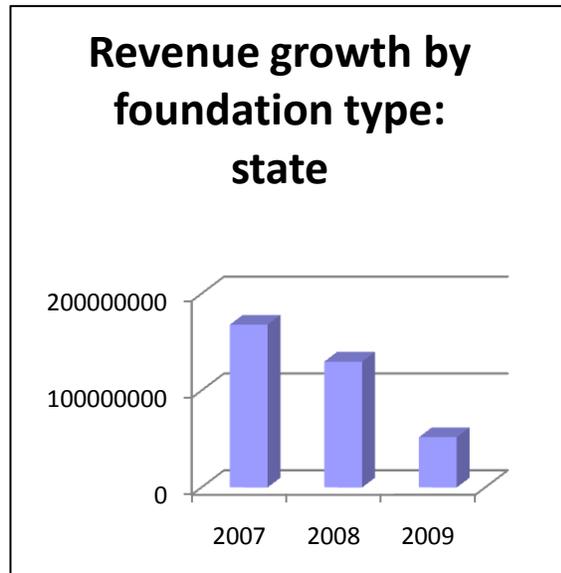
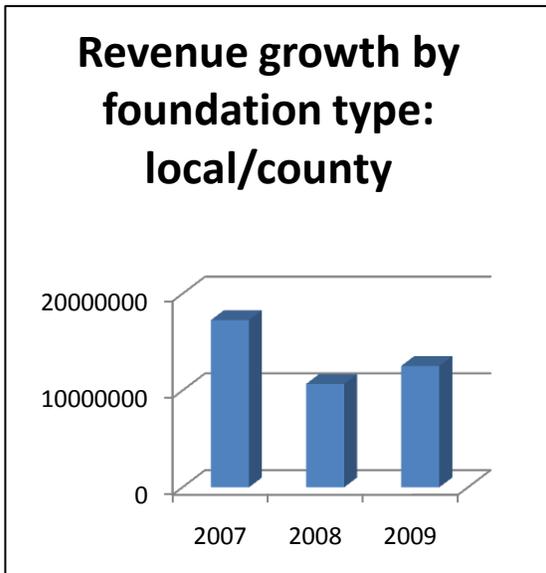
Foundation revenue decreased by 66% between 2007 and 2009. In 2007, foundation revenue was \$192 million. In 2008, foundations generated \$144 million in revenue, a decrease of 25% from 2007. In 2009, foundation revenue went down to \$64.5 million, a decrease of 55% from 2008, showing that the rate of revenue decline increased drastically. The largest revenue for a single foundation in 2009 was \$8.8 million, and the smallest was \$0.

Foundation revenue declined from 2007 to 2009. Between 2007 and 2009, gross income for all responding foundations decreased by 67%. Similarly, gross income for IOLTA foundations decreased 71%. Gross income for non-IOLTA foundations also declined, and decreased by 23% between 2007 and 2009.

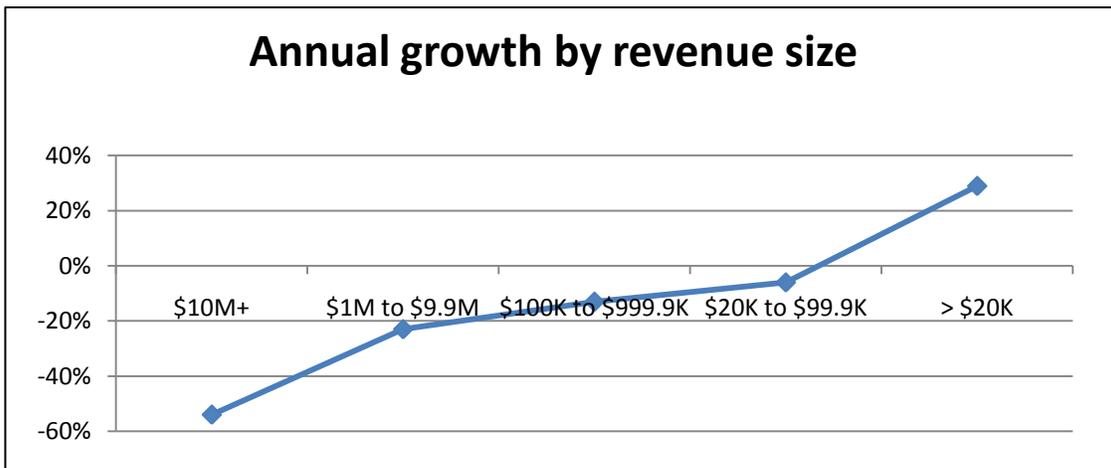


2. Revenue growth

From 2007 to 2008, state foundations experienced a decline in revenue of 23%. Of state foundations, 74% are IOLTA foundations. From 2008 to 2009 those same foundations experienced a decline rate of 59%. From 2007 to 2009, state foundations experienced a decline rate of 60%. Many state foundations administer IOLTA funds; therefore, a large decline in a weak interest rate environment can be expected. Local/county foundation revenue decreased annually at an average rate of 27% from 2007 to 2009.

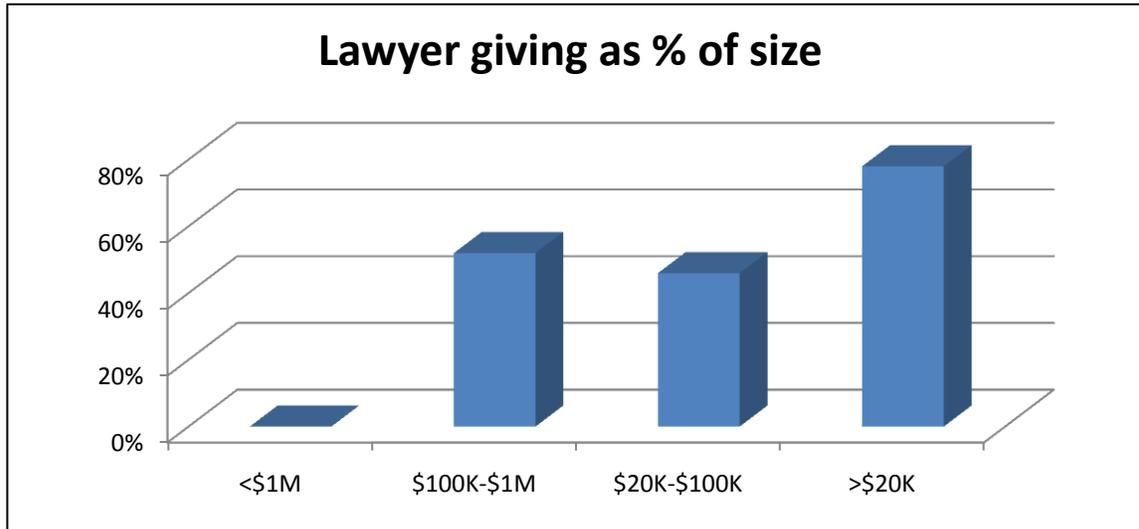


Foundations with higher annual revenue experienced a 38% decrease in revenue, a significantly larger decrease than foundations with less revenue. This is to be expected, in part because most of the foundations with annual revenue over \$10 million and many of the foundations with annual revenue over \$1 million are IOLTA foundations, and also because larger foundations are more likely to receive revenue from investments.



3. Revenue generated by lawyer giving

Foundations maximize value and impact of lawyer giving by providing an organized forum, with focused law-related missions and projects, for donations from the legal community. For the purposes of this Survey, lawyer giving is defined as giving through Fellows programs, law firm drives and campaigns, individual lawyer donations, and dues check off programs.



In 2009, lawyer giving accounted for 22% of foundation revenue. Lawyer giving accounted for \$14.1 million of the total revenue generated by foundations. 31% (\$4.5 million) of this revenue was generated by three foundations. The remaining 55 foundations generated \$9.6 million from lawyer giving, or 15% of total revenue generated in 2009. State foundations received \$6.4 million in lawyer giving in 2009 and local/county foundations received \$7.7 million in lawyer giving in 2009 (two of 28 foundations generated 42% of this revenue).

The amount of lawyer giving to a foundation varies widely in relation to the revenue size of the foundation. Foundations with revenue over \$1 million received only 15% of their revenue from lawyer giving, likely due to the fact that many of the top revenue-generating foundations receive the majority of their funds from IOLTA. Lawyer giving to IOLTA foundations accounted for 11% of those foundations' revenue, for a total of \$5 million.

Foundations with revenue under \$1 million generated much higher percentages from lawyer giving: 52% for foundations with revenue between \$100,000 and \$999,999, 46% for foundations with revenue between \$20,000 and \$99,999, and 78% for foundations with less than \$20,000 in revenue.

Lawyer giving as a percentage of total revenue is, as expected, higher for bar foundations than IOLTA foundations. Lawyer giving to bar foundations accounted for 53% of those foundations' total 2009 revenue, totaling \$9.2 million. Bar foundations averaged

\$248,600 in lawyer giving. The three bar foundations with lawyer giving over \$1 million raised \$4.5 million (49% of total lawyer giving in bar foundations), an average of \$1.5 million each. The remaining 34 bar foundations raised \$4.7 from lawyer giving (49% of total lawyer giving in bar foundations), and averaged \$138,200 each.

4. Bar foundation and IOLTA foundation revenue

a. Bar foundation revenue

Bar foundations generated \$17.5 million in revenue in 2009. 24% of bar foundations generated over \$1 million in revenue in 2009. 17% of bar foundations generated less than \$20,000 in revenue in 2009. The remaining 59% generated amounts in the middle, with 47% falling between \$100,000 and \$999,999.

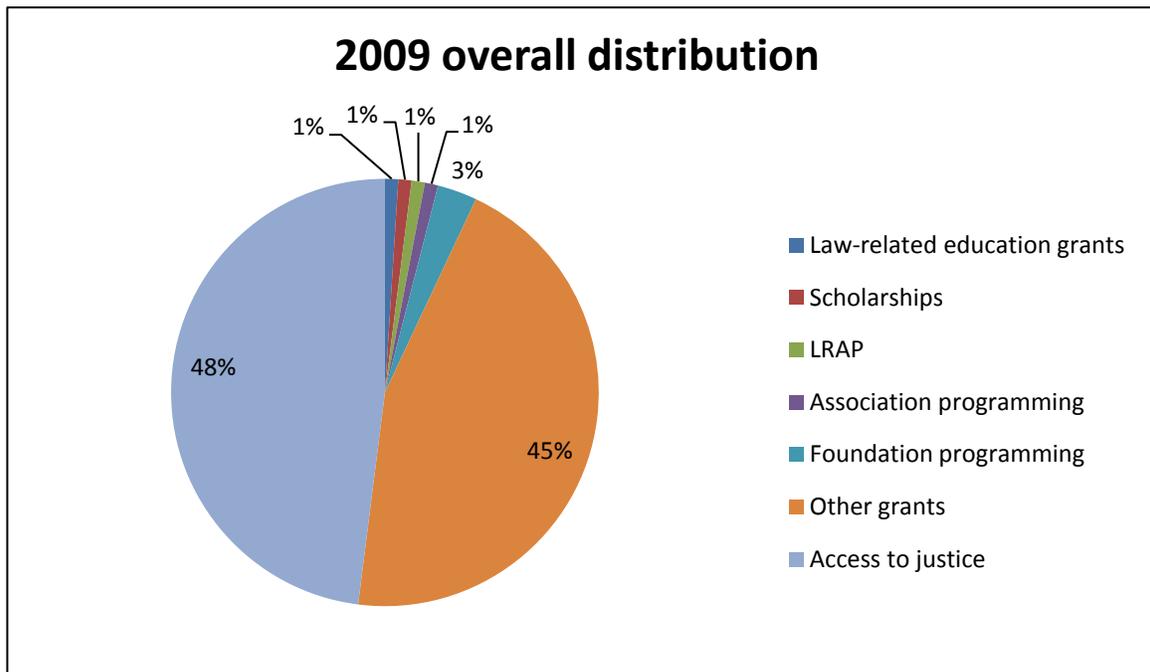
b. IOLTA foundation revenue

IOLTA foundations generated \$47 million in revenue in 2009. 67% of IOLTA foundations generated over \$1 million in revenue in 2009. 5% of IOLTA foundations generated less than \$20,000 in revenue in 2009.

B. Distribution

1. Overview

Foundations surveyed returned \$192 million of their 2009 annual revenue to their communities. Not surprisingly, state foundations, which include most IOLTA foundations, accounted for \$179 million. Local/county foundations distributed \$13 million.

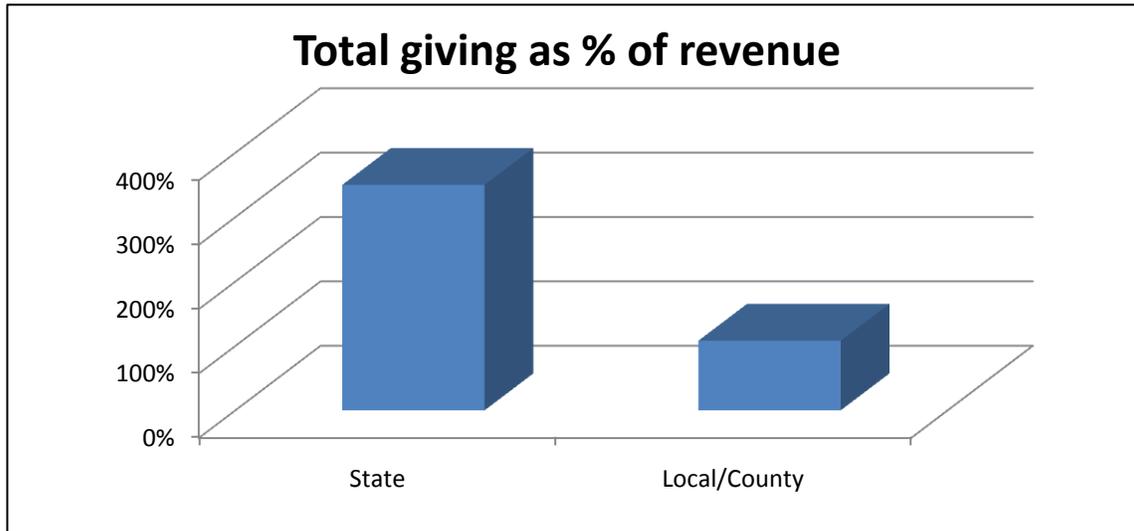


The majority (48%) of foundation funding supported access to justice grants in 2009. Another 45% went towards general grants in foundations' respective communities. Foundations also provided funds for association and foundation programming, scholarships, and provided loan repayment assistance. Only 1% of funds were used for law-related education grants.

2. Foundation distributions as a percentage of revenue

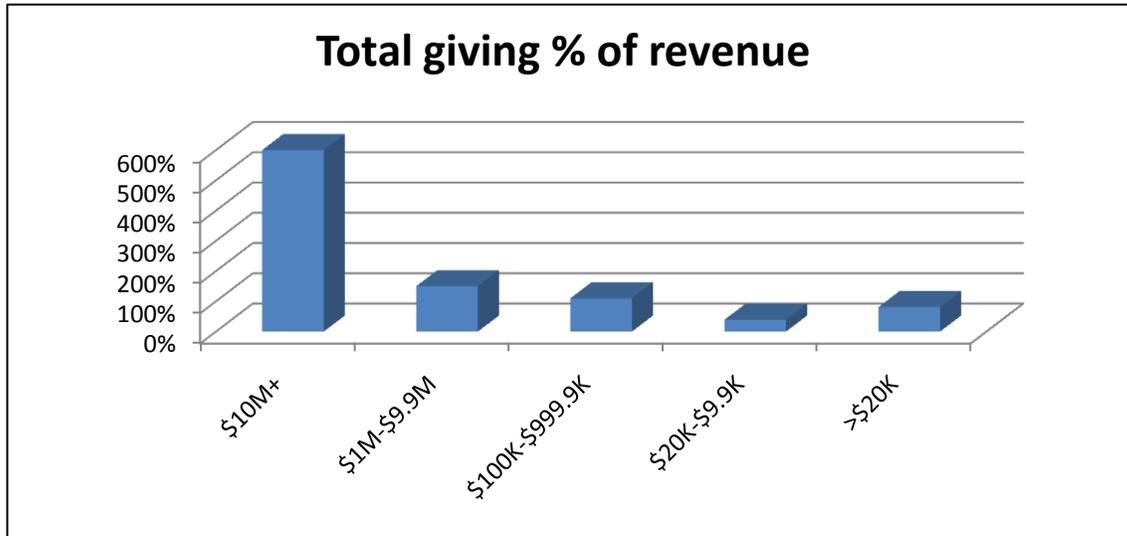
Analysis of the percentage of revenue returned by type of foundation shows state foundations distributed 344% of the revenue they generated in 2009. Local/county foundations distributed 106% of their revenue in 2009.

Foundations that generated \$100,000 or less distributed less revenue than they generated in 2009. Foundations that generated over \$100,000 in revenue distributed more than they made for 2009.

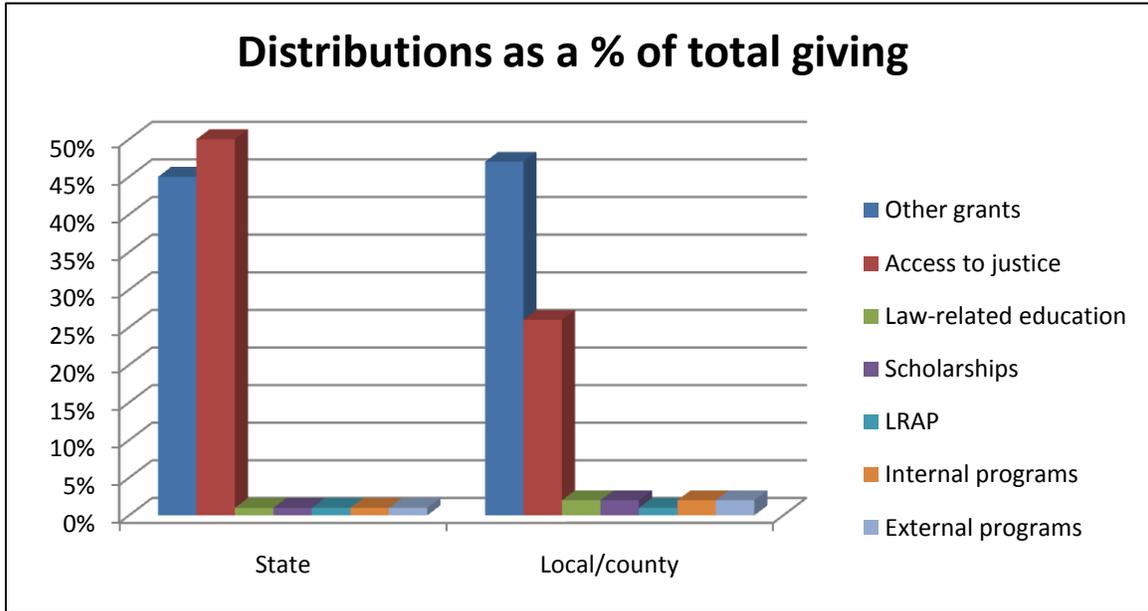


3. Beneficiaries of foundation distributions

Foundations chose grants as the primary vehicle by which to distribute funds in 2009. 93% of foundation distributions were in the form of grants in 2009. 52% of those grants were distributed to support access to justice efforts; 72% of foundations reported they gave one or more access to justice grants in 2009. While 30% of foundations listed improve public understanding of the law and justice system, only 2% of the total distributions from all foundations in 2007 were distributed in law-related education grants.



Local/county foundations distribute the largest portion of their revenue (47%) to non-specified grants. State foundations distribute the vast majority of their revenue (95%) to access to justice grants.



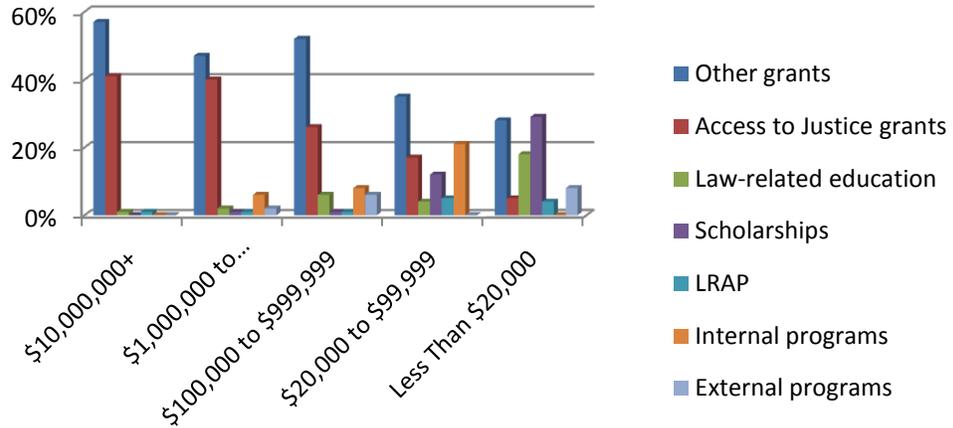
Foundation distributions vary considerably depending on foundation revenue. Foundations with the highest revenue (many of which administer IOLTA funds) distribute 50% of their funds to access to justice grants. A similar trend can be seen with other grants; however the percentage of other grants distributed dips slightly in the \$1 million to \$10 million revenue range. The funding to access to justice grants steadily decreases as foundation revenue decreases, falling to 5% in foundations with less than \$20,000 in revenue.

The same is true in reverse for scholarships. Foundations with the smallest revenue gave 29% of their distributed funds to scholarships. The percentage decreases as foundation revenue increases. Foundations with revenue over \$10 million gave none of their funds to scholarships.

Foundations with revenue under \$100,000 distributed 5% of their total distribution to student loan repayment assistance. With the exception of foundations with revenue less than \$20,000, foundations distribute less than 5% of their available funds to law-related education grants.

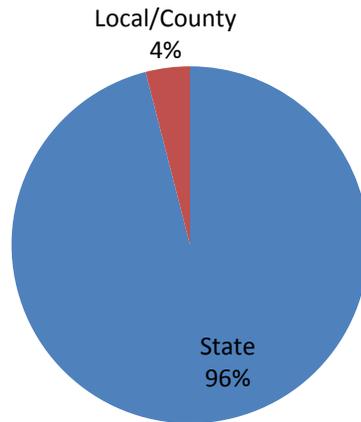
Foundations with revenues of \$20,000 to \$999,999 provide a greater percentage of their revenue to programs run within the foundations themselves (internal programs on the chart below). Foundations with revenues of \$1 million or less provide a greater percentage of their revenue to their related bar associations to run programs (external programs on the chart below). The foundations with the largest revenues distribute no funds for external and internal programs.

Distributions as a % of total giving (by foundation revenue)

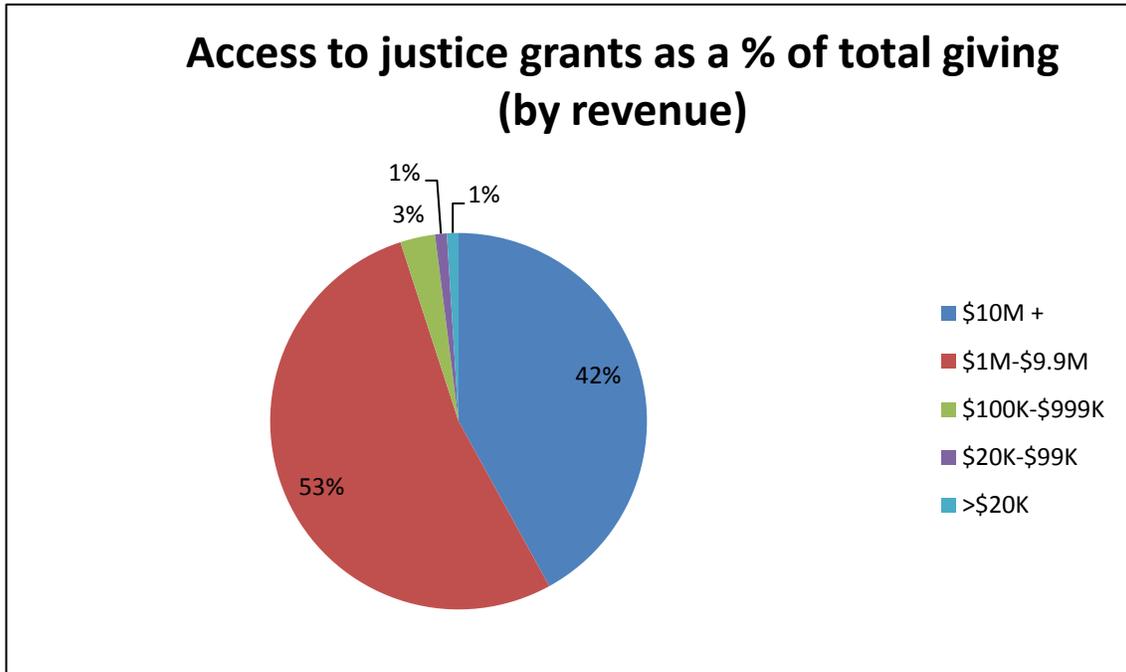


State foundations spent 50% of their 2009 distributions on access to justice grants. Local/county foundations gave 30% of their 2009 distributions to access to justice grants. Of the grants awarded to access to justice, 96% of the funds were contributed from state foundations.

Access to justice grants as a % of total giving



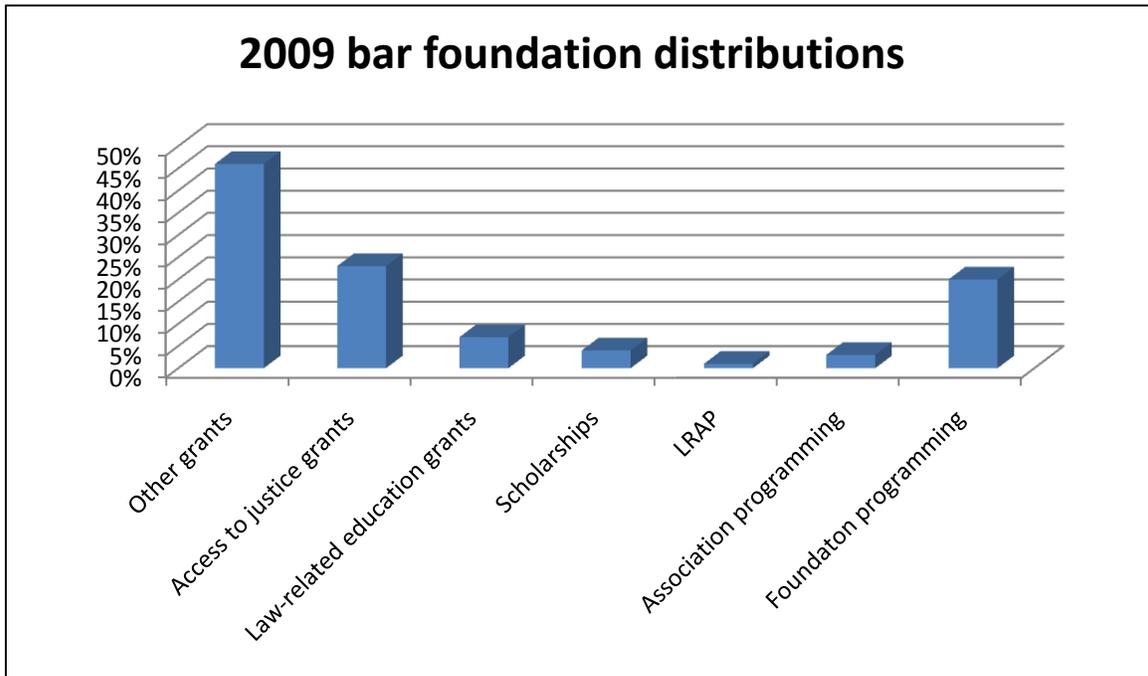
Similarly, foundations with larger revenues (again, often large state foundations that administer IOLTA foundations) provide the largest percentage of funds for access to justice grants. Foundations with revenue over \$1 million account for 94% of all distributions for access to justice efforts.



4. Bar foundation and IOLTA foundation distributions

a. Bar foundation distributions

Bar foundations account for \$17 million of the \$192 million given to communities in 2009. Annual bar foundation giving ranges from \$4,500 to \$3 million per bar foundation. More than 28% of bar foundations distributed between \$100,000 and \$999,999 in 2009. When given the choice between access to justice grants, law-related education grants, and other grants, foundations indicated that 46% of their funds support other grants. Access to justice grants received 23% and foundation programming received 20% of bar foundation distributions. Law-related education grants received only 4% of bar foundation funding in 2009.

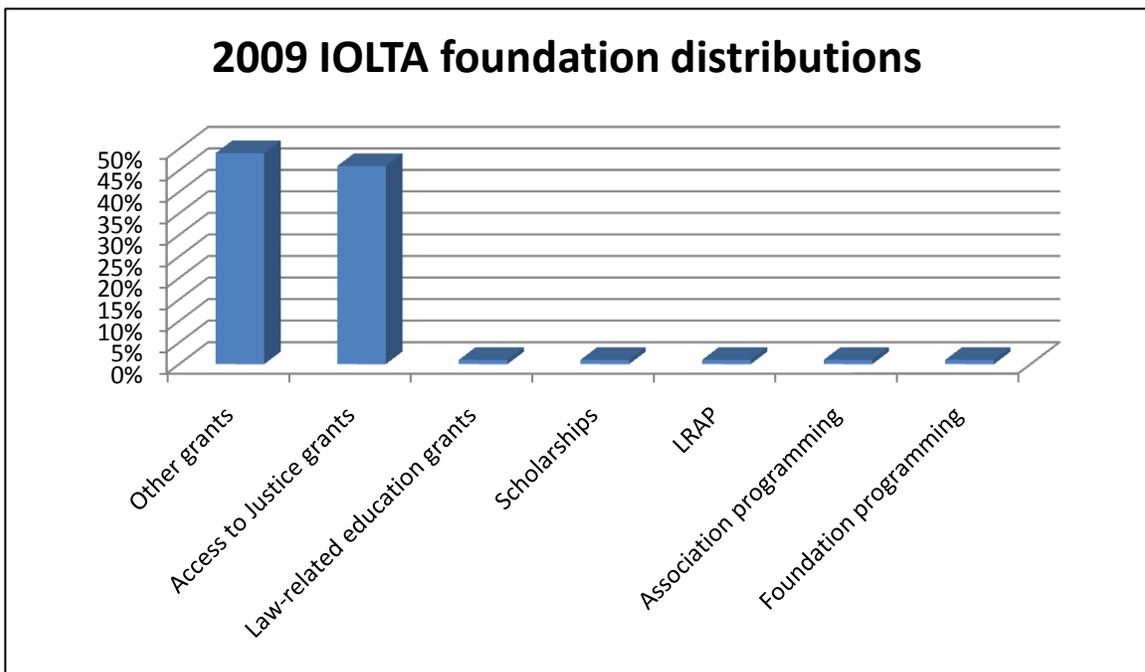


Bar foundations gave 6% of their funding to their related bar associations to run programs. Bar foundations distributed 4% of their funding to scholarships.

b. IOLTA foundation distributions

IOLTA foundations gave \$174 million (90% of the total amount given by all foundations) in 2009. 28% of IOLTA foundations (all from states with large populations) distributed \$10 million or more, and 5% of IOLTA foundations distributed less than \$100,000 in 2009. More than 28% of IOLTA foundations gave between \$1 million and \$5 million in 2009.

95% of IOLTA foundation distributions were in the form of grants in 2009. 45% of those grants supported access to justice efforts. Most IOLTA foundations reported providing grants to support law-related education; however the amount given made up only 1% of all IOLTA distributions in 2009. 24% of IOLTA foundations reported distributing funds for scholarships and the amount given totals 1% of all IOLTA distributions in 2009. IOLTA foundations gave 1% of their 2009 revenue to both foundation programming and related bar association programming in 2009.

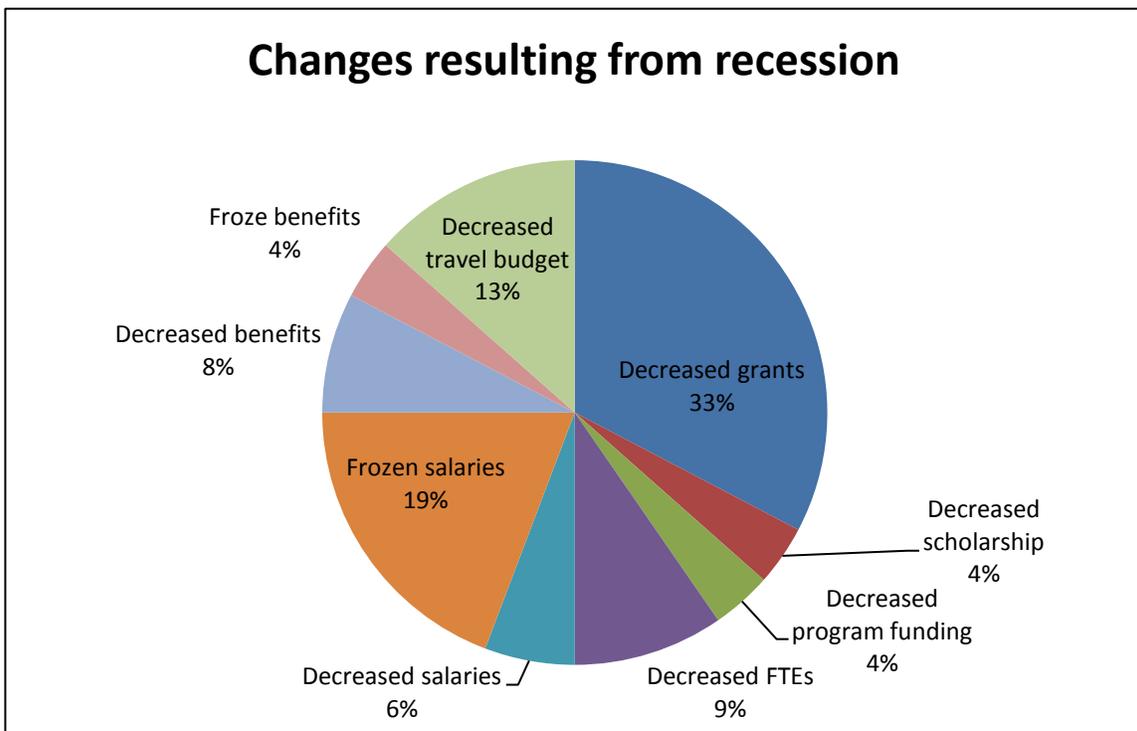


V. QUESTIONS NEW TO THE 2010 SURVEY

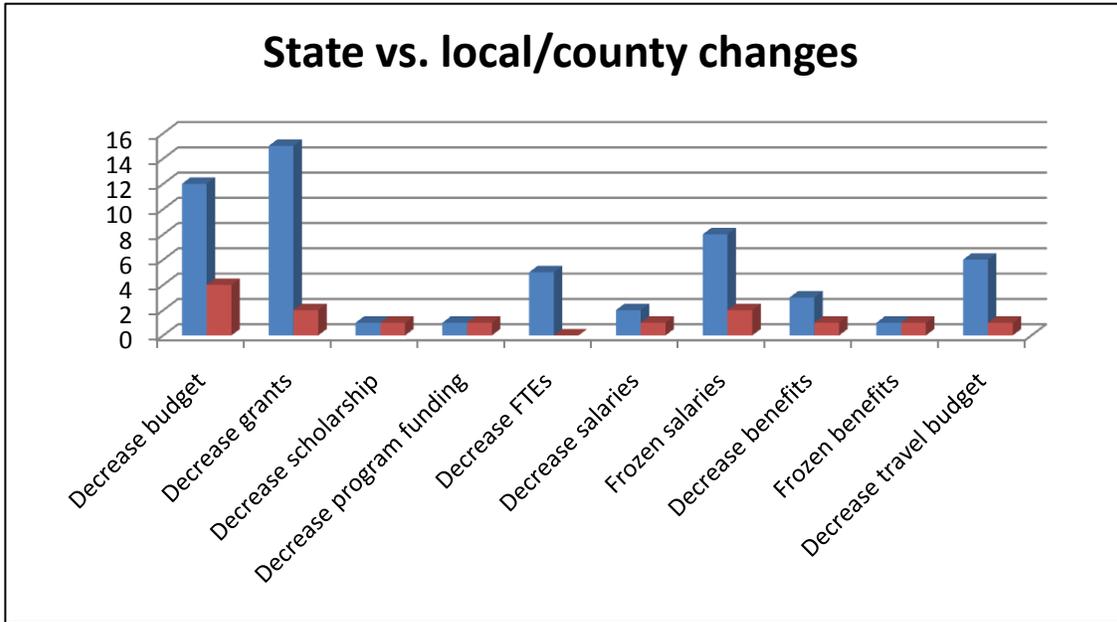
A. Economic changes

In fiscal years 2008 and 2009, 52% of foundations reported decreasing their budgets as a result of the downturn in the local or national economic environment. Of foundations that decreased their budgets, most reported decreased grant awards (35%) and frozen salaries (19%).

Of foundations that reported decreases in their budgets, the majority (76%) were state foundations. State foundations reported decreasing budgets through decrease in grant awards (33%), decrease in full time employees (9%), frozen salaries (19%), and decrease in travel budget (13%).

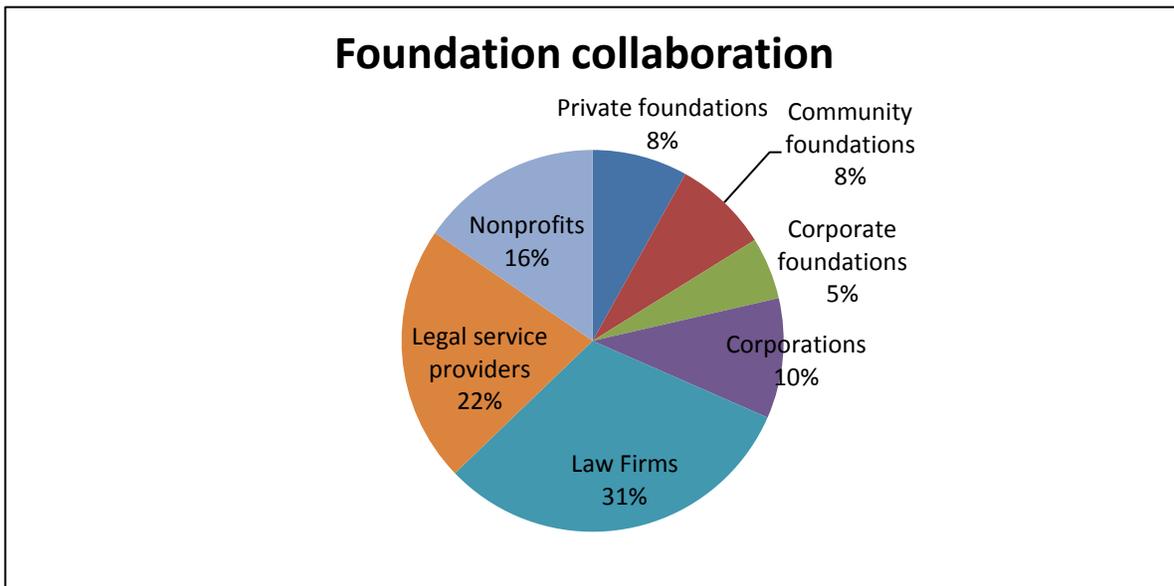


Only 33% of local/county foundations reported decreasing their budgets, and, of those, few reported changes directly resulting from the downturn.



B. Collaboration

95% of foundations reported collaborating with either funders or partners. Of funders, 89% of foundations partner with law firms, 29% partner with corporate foundations, and 23% partner with private and community foundations. In regards to partnerships, 62% of respondents reported partnering with legal service providers and 44% partner with local nonprofits.



VI. CONCLUSION

The downturn in the economy had a significant impact on foundations nationwide and as a result, foundation revenue decreased by 66% between 2007 and 2009. Bar foundations generated \$17.5 million in revenue and IOLTA foundations generated \$47 million in revenue, totaling \$64.5 million.

Lawyer giving accounted for \$18.5 million of the total revenue generated by foundations in 2009. Foundations have a unique opportunity, as they provide focused mission and law-related projects to a constituency of lawyers. This distinguishing characteristic furthers the potential of engaging the legal community in having a stronger investment in bar foundations.

Despite troubling economic times, foundations were still able to further their missions by distributing over \$192 million in 2009. 46% of foundation distributions were given to support access to justice efforts in 2009. By granting \$92 million to these efforts, foundations played a major role in helping members in society who cannot afford to retain lawyers obtain legal representation.

The remaining \$100 million distributed by foundations directly impacted communities by supporting law-related education programs, law-related charitable projects, and providing scholarships and loan repayment assistance.

Appendix A: NCBF Survey request e-mail

Dear [ED or President first name],

Your legal foundation is making a difference in your community. We confirmed this through the National Conference of Bar Foundation (NCBF) survey on “The State of Bar Foundations” conducted two years ago. The information gained from that survey was essential to measure the value and impact that foundations have collectively on a local, state and national level; however, to remain relevant and useful to you, it must be updated.

Please take 5 - 10 minutes to complete this brief survey by clicking on the following link: [link here]. The deadline for completing the survey is May 21, 2010. NCBF, in conjunction with ALPS Foundation Services, will compile and analyze the results. The data related to the cumulative impact of bar foundations will be available to all survey participants (the individual data collected in the survey will remain confidential). The information gathered from this survey will support the efforts of foundations in marketing, fundraising, access to justice, and other “good works” within our communities.

No matter how big or small your foundation, your input **is essential** for a valid and valuable survey report. If you have any questions or comments, please do not hesitate to contact me at ch@rubin-levin.net or contact NCBF at info@ncbf.org.

Sincerely,

Christine Hickey, President
National Conference of Bar Foundations

Appendix B: Respondents to the NCBF Survey

Allegheny County Bar Foundation
Arizona Foundation for Legal Services & Education
Atlanta Volunteer Lawyers Foundation
Austin Bar Foundation
Bar Association of San Francisco Foundation
Beverly Hills Bar Foundation
California Bar Foundation
Chicago Bar Foundation
Clearwater Bar Foundation
Columbus Bar Foundation
Cumberland County Bar Foundation
DC Bar Foundation
Erie County Bar Foundation
Escambia/Santa Rose Foundation
Florida Bar Foundation
Foundation of the Bar Association of DC
Genesee County Bar Foundation
Georgia Bar Foundation
Greater Richmond Foundation
Hennepin County Bar Foundation
Idaho Law Foundation
Indianapolis Bar Foundation
Iowa State Bar Foundation
John L. Sanders Evansville Bar Foundation
Kansas Bar Foundation
Los Angeles County Bar Foundation
Lake County Bar Foundation
Lancaster Bar Association Foundation
Lawyers Trust Fund of Illinois
Legal Foundation of Washington
Louisville Bar Foundation
Massachusetts Bar Foundation
Minnesota IOLTA foundation
Mississippi Bar Foundation
Montana Justice Foundation
Multnomah Bar Foundation
Nebraska State Bar Foundation
Nevada Law Foundation
New York Bar Foundation
New York County Lawyers Association Foundation
North Dakota Bar Foundation
Ohio State Bar Foundation
Oklahoma Bar Foundation

Orange County Bar Foundation
Philadelphia Bar Foundation
Rhode Island Bar Foundation
San Diego Bar Foundation
South Carolina Bar Foundation
Springfield Metropolitan Bar Foundation
St. Louis Bar Foundation
Vermont Bar Foundation
Virginia Law Foundation
Washington State Bar Foundation
Washoe County Bar Foundation
West Virginia Bar Foundation
Westchester County Bar Foundation
Wisconsin Law Foundation
Wyoming State Bar Foundation

Appendix C: “The State of Bar Foundations: 2010 Cumulative Impact Survey” Questions

1. Did your organization complete the 2008 NCBF “The State of Bar Foundations: Cumulative Impact Survey”? (if yes, you will skip to question 7)
 - a. Yes
 - b. No
2. What is the name of your foundation?
3. Please enter your information
 - a. Foundation name
 - b. Your name
 - c. Your title
 - d. Foundation address
 - e. City/Town
 - f. State
 - g. Zip
 - h. Contact e-mail
 - i. Foundation phone number
4. What is your foundation's primary mission? (choose only 1)
 - a. Ensure equal access to justice
 - b. Improve public understanding of the law and the justice system
 - c. Ensure the legal profession remains open to people from all walks of life (e.g. student loan repayment assistance, scholarships)
 - d. Promote *pro bono* work in the legal community
 - e. Help lawyers who are experiencing difficulties
 - f. Other (describe)
5. What does your foundation do to achieve its mission? (check ALL that apply)
 - a. Distribute grants for access to justice
 - b. Distribute grants for law-related education
 - c. Distribute grants for other causes
 - d. Encourage *pro bono* activity
 - e. Fundraise
 - f. Provide access to justice programs
 - g. Provide law-related education programs
 - h. Provide other programs
 - i. Provide scholarships
 - j. Student loan repayment assistance
 - k. Supporting other charitable efforts
 - l. Other (please specify)

6. Describe your foundation (check ALL that apply):
 - a. National
 - b. State
 - c. Local/County
 - d. Specialty (e.g. Women's Association Foundation)

7. How many members are in your foundation's related bar association?
 - a. 1-100
 - b. 101-500
 - c. 501-1,000
 - d. 1,001-10,000
 - e. 10,001-20,000
 - f. 20,001-30,000
 - g. 30,001-40,000
 - h. 40,001-50,000
 - i. 50,001-75,000
 - j. 75,001-100,000
 - k. 100,001-200,000
 - l. 200,000+

8. List your foundation's total income for fiscal year 2007 (please indicate if using actual numbers or approximations):

9. List your foundation's total income for fiscal year 2008 (please indicate if using actual numbers or approximations):

10. List your foundation's total income for fiscal year 2009 (please indicate if using actual numbers or approximations):

11. Of your total income in fiscal year 2009, what amount was generated from lawyer giving or fundraising within the legal community (e.g. Fellows program, law firm drives, individual lawyer giving, dues check-off)? (please do not include IOLTA income)

12. Does your foundation administer any portion of the state Interest on Lawyers' Trust Accounts (IOLTA) program? (if no, you will skip to question 15)

13. List your foundation's IOLTA income for fiscal year 2007 (please indicate if using actual numbers or approximations):

14. List your foundation's IOLTA income for fiscal year 2008 (please indicate if using actual numbers or approximations):

15. List your foundation's IOLTA income for fiscal year 2009 (please indicate if using actual numbers or approximations):

16. In fiscal year 2009, list the total amount your foundation distributed in grants (do not include student loan repayment assistance, scholarships, etc.) (please indicate if using actual numbers or approximations):
17. In fiscal year 2009, list the amount your foundation distributed in access to justice grants (including grants to courts, legal aid organizations and legal service organizations) (please indicate if using actual numbers or approximations):
18. In fiscal year 2009, list the amount your foundation distributed in law-related education grants (do not include student loan repayment assistance, scholarships, etc.) (please indicate if using actual numbers or approximations):
19. In fiscal year 2009, list the amount your foundation distributed in scholarships (please indicate if using actual numbers or approximations):
20. In fiscal year 2009, list the amount your foundation distributed to student loan repayment assistance programs (please indicate if using actual numbers or approximations):
21. In fiscal year 2009, list the amount your foundation provided to the related bar association to run programs (including association-run access to justice, law-related education, loan repayment assistance, and lawyers assistance programs) (please indicate if using actual numbers or approximations):
22. In fiscal year 2009, list the amount your foundation utilized to run its own programs (including access to justice, law-related education, loan repayment assistance, and lawyers assistance programs) (please indicate if using actual numbers or approximations):
23. In fiscal years 2008 or 2009, did your foundation decrease its budget as a result of the downturn in the local or national economic environment? (if no, you will skip to question 24)
 - a. Yes
 - b. No
24. In fiscal years 2008 or 2009, what changes did your foundation make as a direct result of the downturn in the local or national economic environment? (check all that apply)
 - a. No changes
 - b. Decreased overall budget
 - c. Decreased grantmaking or scholarship levels (indicate amount)
 - d. Decreased number of FTEs (indicate number)
 - e. Decreased staff salaries
 - f. Frozen staff salaries
 - g. Decreased staff benefits
 - h. Frozen staff benefits

- i. Decreased travel budget
 - j. Increased FTEs
 - k. Increased staff salaries
 - l. Other (please describe)
25. What funders or partners are in collaboration with or work closely with your foundation? (check all that apply)
- a. Private foundations
 - b. Community foundations
 - c. Corporate foundations
 - d. Corporations
 - e. Law firms
 - f. Legal services providers
 - g. Local nonprofits
 - h. Other (please describe)
26. How has collaboration with funders and partners impacted the mission of your foundation?
- a. Increased foundation revenue
 - b. Increased funding to grantees from sources other than your foundation
 - c. Increased number of hours of *pro bono* services for legal services
 - d. Improved lobbying efforts
 - e. Other (please describe)
27. How would you like this information to be disseminated? (check all that apply)
- a. Email
 - b. Posted on NCBF website
 - c. Mail (hard copy)
 - d. *Bar Leader* article
 - e. Other (please describe)