

# MASSBAR

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# FOUNDATION

## 2022 Annual Report



**President**  
Angela C. McConney, Esq.

**Executive Director**  
Susannah W. Thomas

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## OFFICERS

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 Donor Relations Manager  
 AFord@massbar.org  
 (617) 338-0647

# A letter from the President

Dear Friends,

Our 2022 Foundation year marked a return to the “new normal” of post-pandemic work and life. While the year started off virtually, we were grateful to hold our 2022 Annual Meeting in-person in June at the historic JFK Library. It was heartening to gather again with treasured colleagues and supporters after such a prolonged period of remote interaction. We honored Dr. Jim O’Connell of Boston’s Healthcare for the Homeless Program as our 2022 Great Friend of Justice, while Matthew Selig, Esq. of Health Law Advocates addressed us as the Grantee Speaker. At the meeting, I offered sincere thanks to Past President Dick Grahn for the pattern of his steady and reassuring leadership throughout the challenges of 2020 and 2021. It was then my honor and a privilege to assume the mantle of the MBF presidency.

2022 was another productive year for the MBF, as highlighted throughout this report. In addition to our grantmaking, the MBF continued to advance the principles of diversity, equity, and inclusion on an organizational level internally through training for the Board of Trustees and staff, and externally through our grantmaking efforts.

At the center of our mission, our MBF grant recipients demonstrate strength, resilience, creativity, and compassion. In 2022, they provided over 50,000 low-income clients across Massachusetts with civil legal assistance related to housing, education, employment, health care, immigration and more through MBF-funded programs. The work of each of these organizations has a deep and lasting impact for individuals, families, and communities across the Commonwealth.

None of the MBF’s positive outcomes would be made possible without the steadfast and generous support of our fellows, donors, and volunteers. I also express our appreciation to the leadership of the Mass. Bar Association. We are proud to be your philanthropic partner.

On behalf of the MBF Board of Trustees, I am pleased to present our 2022 Annual Report.

Let Justice be Done.



Angela C. McConney, Esq.  
MBF President





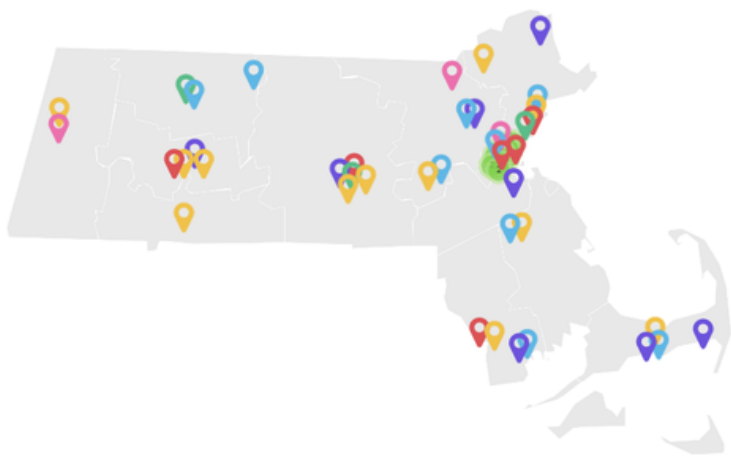
# Mission and Impact

## Mission

The Massachusetts Bar Foundation represents the commitment of the lawyers and judges of Massachusetts to improve the administration of justice, to promote an understanding of the law, and to ensure equal access to the legal system for all residents of the Commonwealth, particularly those most vulnerable.

## Impact

The impact of the MBF's work can be felt in every region of the Commonwealth. From Cape Cod to the Berkshires, the MBF provides critical funding to legal aid programs that help low-income individuals and families get the help they need to overcome tremendous obstacles and move toward a brighter future.



To view interactive charts and maps, visit [www.MassBarFoundation.org/about](http://www.MassBarFoundation.org/about).

### 2022 by the numbers...



**\$2.6M**

In IOLTA grants distributed



**^50,000**

Clients served with IOLTA grants



**91**  
Programs funded



**5**  
New IOLTA programs



**86**  
Volunteers



**6**  
Legal Interns Funded



**17**  
New Fellows pledges



**4**  
Events hosted



**23**  
Sponsors supported



**5**  
Fiscal Agent Programs



# Legal Intern Fellowship Program Milestone



In 2022, the MBF celebrated 25 years of its Legal Intern Fellowship Program, which has funded over 130 law students interning at legal aid organizations across the state. Learn more and read the full article here.

# Legacy of Courage Film Project



Created over two years by the **Justice George Lewis Ruffin Society** and produced by **Northern Light Productions**, the film *Legacy of Courage: Black Changemakers in MA Past, Present, Future* chronicles how African American activists in Massachusetts have used the legal system to pursue freedom and civil rights for more than 400 years. The MBF was a major sponsor of the *Legacy of Courage* film project, contributing \$20,000 to its production. Watch the film here.

# 2022 MBF FINANCIAL STATEMENT AS OF 12/31/22 (Audited)

|                          |                    |
|--------------------------|--------------------|
| <b>ASSETS</b>            |                    |
| Cash and Equivalents     | \$2,414,749        |
| Investments – short-term | \$3,619,121        |
| Investments – long-term  | \$2,795,671        |
| Receivables and Property | \$260,238          |
| <b>TOTAL ASSETS</b>      | <b>\$9,089,779</b> |

|   |                    |
|---|--------------------|
| <b>LIABILITIES AND NET ASSETS</b>         |                    |
| Current Liabilities                       | \$1,357,849        |
| Net Assets*                               | \$7,731,930        |
| <b>TOTAL LIABILITIES &amp; NET ASSETS</b> | <b>\$9,089,779</b> |

|                       |                    |
|-----------------------|--------------------|
| <b>REVENUES</b>       |                    |
| IOLTA Receipts        | \$3,726,386        |
| Contributions         | \$310,724          |
| Investment Income     | (\$849,787)        |
| <b>TOTAL REVENUES</b> | <b>\$3,187,323</b> |

|                             |                    |
|-----------------------------|--------------------|
| <b>EXPENSES</b>             |                    |
| Grants                      | \$2,795,216        |
| Foundation Operations       | \$393,082          |
| <b>TOTAL EXPENSES</b>       | <b>\$3,188,298</b> |
| <b>CHANGE IN NET ASSETS</b> | <b>(\$975)</b>     |

\*Funds that comprise the MBF’s net assets

|  |             |
|--|-------------|
| <i>IOLTA Grant Fund</i>                | \$3,119,075 |
| <i>Fellows Fund</i>                    | \$553,395   |
| <i>Reserve Fund</i>                    | \$2,134,506 |
| <i>IOLTA Stabilization Fund</i>        | \$695,481   |
| <i>Civil Justice Fund</i>              | \$260,341   |
| <i>Smith Family Fund</i>               | \$541,164   |
| <i>Napolitano Fund</i>                 | \$64,990    |
| <i>Worcester Funds for Justice</i>     | \$67,905    |
| <i>Gray Scholarship Fund</i>           | \$10,823    |
| <i>CJ Hennessey Fund</i>               | \$23,508    |
| <i>CJ Gants Access to Justice Fund</i> | \$260,742   |

# 2022 Great Friend of Justice



## DR. JIM O'CONNELL

### BOSTON HEALTH CARE FOR THE HOMELESS PROGRAM

Presented annually to an individual who has demonstrated extraordinary commitment to justice, consistent with the MBF's values and mission, Dr. O'Connell's life-long dedication to social justice and health care access for all exemplifies the spirit of this award.

## 2022 President's Awards



### MICHELLE BUGBEE, ESQ.

WESTERN MA



EASTERN MA

## 2022 Grantee Speakers



**Matthew Selig**  
Health Law Advocates



**Mariatu Okonofua**  
Boston College Law School  
Youth Advocacy Foundation



**Helene Busby & Molly Jane Thoms**  
Community Legal Aid







# 2022/2023 IOLTA Grants

The MBF Awarded \$2.6 million to 89 programs through its IOLTA Grants Program.

## BARNSTABLE COUNTY

### **Barnstable County Bar Association**

Barnstable County Probate & Family Court  
\$19,920

### **Cape Mediation**

Court Mediation & Conciliation - \$16,500

### **South Coastal Counties Legal Services**

Homelessness Prevention - \$37,000

### **WE CAN**

Legal Svcs, Consultations & Workshops  
\$16,500

## BERKSHIRE COUNTY

### **Berkshire County Reg, Housing Auth.**

Housing Services & Mediation - \$36,000

### **Berkshire Immigrant Center**

Immigration Legal Services & Education  
\$22,500

### **Health Law Advocates, Inc.**

Mental Health Advocacy Program for Kids  
\$15,000

## BRISTOL COUNTY

### **Bristol County Bar Association**

Pro Bono Conciliation Program - \$10,000

### **Catholic Social Services of Fall River**

Immigration Law Programs - \$110,000

### **South Coastal Counties Legal Services**

Education Advocacy Project - \$45,000  
Elder Law Project - \$27,500

### **The Women's Center**

Legal Advocacy Program - \$30,000

## ESSEX COUNTY

### **Children's Law Center of Mass.**

Child & Adolescent Legal Services - \$65,000

### **Essex County Bar Association**

Housing Court Lawyer for a Day - \$17,500  
Multi-Court Pro Bono Conciliation - \$17,000  
Probate & Family Court Lawyer for a Day  
\$16,000

### **Greater Lawrence Community Action Council**

Immigration Services Program - \$5,000

### **Jeanne Geiger Crisis Center**

Domestic Violence Family Law - \$19,900

## ESSEX COUNTY (Cont'd)

### **North Shore Community Mediation, Inc.**

Court and Community Mediation - \$5,500

### **Northeast Legal Aid**

Consumer Law Project - \$20,000  
Domestic Violence Helpline - \$12,000  
Imm. Victims of Dom. Violence - \$35,000  
Lawyer for A Day Program - \$59,900

## FRANKLIN COUNTY

### **Collaborative Resolutions Group**

Family Mediation Program - \$15,000

### **Franklin County Bar Assn. Advocates**

Advocates for Justice - \$44,500

### **Quabbin Mediation**

Rural Court Mediation - \$7,500

## HAMPDEN COUNTY

### **Community Legal Aid, Inc.**

Hampden County Education Law - \$10,000  
Seniors Partner for Justice - West - \$13,580  
Western Mass. Family Law Advocacy - \$45,000  
Western Mass. Eviction Defense - \$65,000

### **Hampden County Bar Association**

Children's Law Project - \$60,000

## HAMPSHIRE COUNTY

### **Center for New Americans**

Citizenship & Immigration Program - \$16,500

### **Hampshire County Bar Association**

HELP & DRPC - \$15,000

### **Safe Passage**

Legal Advice and Referral Panel - \$20,000

## MIDDLESEX COUNTY

### **Community Dispute Settlement Center**

Divorce/Family/Juvenile Dist. Court Mediation  
\$17,340

### **De Novo Center for Justice & Healing**

Domestic Violence Advocacy - \$36,000  
Homelessness Prevention Project - \$20,000  
Immigration Law Project - \$55,000

### **Housing Families, Inc.**

Homelessness Prevention & Legal Services  
\$25,000

### **Mediation Works Incorporated**

Volunteer Court Program - \$10,000

## MIDDLESEX COUNTY (Cont'd)

### **MetroWest Legal Services**

Children's Ed. Advocacy - \$23,000  
Domestic Violence Project - \$47,000  
Juvenile Immigrant Relief - \$27,000

### **MetroWest Mediation Services, Inc.**

Court Mediation & Conciliation Services  
\$12,500

### **Middlesex County Bar Association**

Pro Bono Conciliation Prog. - \$12,000

### **Saheli, Inc.**

Legal Advocacy Program - \$10,000

### **The Second Step**

Steps to Justice - \$7,500

## NORFOLK COUNTY

### **DOVE, Inc.**

Legal Advocacy Program - \$25,000

## PLYMOUTH COUNTY

### **Pilgrim Advocates, Inc.**

Lawyer of they Day - \$12,000

### **Plymouth County Bar Association**

Probate & Family Court Conciliation  
\$5,000

### **South Coastal Counties Legal Services**

Immigration Law Project - \$65,000

## SUFFOLK COUNTY

### **Boston CASA, Inc.**

Court Appointed Special Advocates for  
Children & Youth - \$10,000

### **Casa Myrna Vazquez, Inc.**

Legal Advocacy Program - \$45,000

### **Finex House, Inc.**

Legal Advocacy Program - \$20,000

### **Flaschner Judicial Institute**

Education Programs & Publications for  
Judges - \$155,000

### **Greater Boston Legal Services**

Affordable Housing, Shelter Access, &  
Foreclosure Prevention - \$47,500  
Families Work & Welfare - \$32,500  
Pro Bono Employment & Health Care  
for Low-Wage Workers' - \$42,500  
Refugees & Immigrant Protect - \$47,500

# 2022/2023 IOLTA Grants (Continued)

## SUFFOLK COUNTY (Cont'd)

### **Health Law Advocates, Inc.**

Med-Legal Partnership - \$15,000

### **JRI Health Law Institute**

Serving the Underserved - \$15,000

### **Justice at Work**

Small Claims Wage Theft - \$20,000

### **KIND, Inc.**

Legal Aid for Unaccompanied Imm.

Children Impacted by Covid - \$10,000

### **Lawyers Clearinghouse**

MA Legal Clinic for the Homeless &

Nonprofit Assistance Program - \$17,500

### **Lawyers for Civil Rights - Boston**

Medical-Legal Partnership - \$10,000

### **Mabel Center for Immigrant Justice**

Legal Rep. for the Dedicated Docket

\$10,000

### **Mass. Advocates for Children**

Children's Law Support & Education

Justice Project - \$40,000

### **Mass. Immigrant and Refugee**

#### **Advocacy (MIRA) Coalition**

40-Hour Immigration Law Training

\$10,000

## SUFFOLK COUNTY (Cont'd)

### **Mass. Law Reform Institute**

Mass Legal Answers Online - \$10,000

Statewide Equity, Stability & Justice

Project - \$48,000

### **Pension Action Center (UMass**

#### **Foundation as fiscal agent)**

Helpline & Case Advocacy for Older

Adults - \$10,000

### **Pine Street Inn**

Homeless Court Program - \$15,000

### **Political Asylum/Immigration**

#### **Representation Project**

Asylum & Detention Prog. - \$100,000

### **Prisoners' Legal Services**

Health Equity & Brutality Proj. - \$72,500

### **Rian Immigrant Center**

Immigration Legal Services - \$35,000

### **Third Sector New England**

Family Law Project at the Mental Health

Legal Advisors Committee - \$30,500

### **Veterans Legal Services, Inc.**

Expansion of Legal Aid Services for

Massachusetts Veterans - \$45,354

### **Victim Rights Law Center**

Pro Bono Enrichment Project - \$5,500

## SUFFOLK COUNTY (Cont'd)

### **Women's Bar Foundation of MA**

The Family Law Project for Domestic

Abuse Survivors - \$15,000

### **Youth Advocacy Foundation**

EdLaw Project - \$13,500

## WORCESTER COUNTY

### **Ascentria Community Services, Inc.**

Immigration Legal Assistance Program

\$65,396

### **CASA Project, Inc.**

Child Court Advocacy Prog. - \$50,000

### **Community Legal Aid, Inc.**

Central-West Veterans' Outreach &

Advocacy Project - \$15,000

District Court Debt Collection - \$10,000

Pro Bono Rep. in Family Court - \$25,000

Worcester County Education Law Project

\$23,110

Zarrow Homeless Advocacy Project

\$55,000

### **Dismas House of Central Mass.**

BAR None Program

\$18,500

### **YWCA of Central Massachusetts**

Court Advocacy (Greater Worcester &

North Central Mass) - \$25,000

## Thank you 2022/2023 IOLTA Grant Advisory Committee Volunteers

John Achatz

Robert Ambrogi

Janet Aserkoff

Peter Benjamin

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Michelle Bugbee

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Ronald Witmer

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Albert Zabin

# 2022 Legal Intern Fellows

The MBF Legal Intern Fellowship Program selects exemplary law students to receive stipends of \$6,000 each for work at Massachusetts nonprofits each summer. It was created to inspire a future generation of public interest attorneys, while increasing staff resources to local legal aid organizations. The program is funded by Fellows' contributions and the Smith Family Fund.

Thank you to our LIFP Committee: Chair G. Perry Wu, Corey Carvalho, Hon. Marguerite Grant, Melissa Langa, & Mary Jeanne Stone.



**Christine Batista**  
Suffolk University Law School  
Harvard Legal Aid Bureau



**Dhairya Bhatia**  
Boston College Law School  
Greater Boston Legal Services



**Caitlin Fisher-Draeger**  
New England Law | Boston  
Greater Boston Legal Services



**Rachel Niegelberg**  
Harvard Law School  
Children's Law Center of Mass.



**Mariatu Okonofua**  
Boston College Law School  
Youth Advocacy Foundation



**Rebecca Sennott**  
Suffolk University Law School  
Harvard Legal Aid Bureau

## 2022 Special Grant

**Massachusetts Bar Association**  
*MA Supreme Judicial Court- Judicial Youth Corps*  
\$40,290

The Judicial Youth Corps gives high school students an opportunity to experience the judicial system and learn about the law through educational sessions and hands-on, paid internships in the courts during the summer.





# Thank you to our 2022 Donors

## Annual Appeal

|                          |                              |                          |                              |
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| Raya S. Dreben           | Hon. Joseph Lian             | Jamie Ann Sabino         |                              |
| James J. Duane III       | Jeffrey A. Locke             | Stephen E. Seckler       |                              |

## Bequest



In 2022, the MBF was informed of a bequest made by Hon. Rudolph Kass and fulfilled by The Kass Family Trust. This gift will continue Judge Kass's legacy of social justice.

# Contributions to the Society of Fellows

## President's Circle

Pledges of \$10,000+

Richard J. Grahn  
Margaret J. Hurley

Thomas P. Jalkut  
Laurence M. Johnson

Robert S. Molloy  
G. Perry Wu

## Oliver Wendell Holmes

Pledges of \$5,000

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## Louis D. Brandeis

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Sheila B. Giglio

Matthew J. Ginsburg  
Albert B. Maggio Jr.  
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Victoria Santoro Mair  
Jeffrey J. Trapani  
Michael J. Zeman

Please note: in accordance with the MA Code of Judicial Conduct, these lists do not include the names of active judges who are Lead Fellows.

## Foundation Fellows

Pledges of \$1,500

Akosua Agyepong  
Emanuel Alves  
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