

# 2017 ANNUAL REPORT

NEVADA BAR FOUNDATION



NFB

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LAS VEGAS, NV 89102

[WWW.NEVADABARFOUNDATION.ORG](http://WWW.NEVADABARFOUNDATION.ORG)

## EXECUTIVE SUMMARY

The Nevada Bar Foundation (NBF) is the charitable arm of the State Bar of Nevada, supporting charitable giving related to access to justice and legal education programs. Since 2014, the NBF has also managed the statewide Interest on Lawyer Trust Accounts (IOLTA) program.

With IOLTA funds, the NBF makes annual grants to organizations that promote access to justice through direct legal services to the poor, to victims of domestic violence and children protected by or in need of protection of the juvenile court. **This year, the NBF awarded more than \$2.6 million in IOLTA grants – and has awarded nearly \$11 million since assuming management of the IOLTA program in late 2014.** These funds serve more than 34,000 low income Nevadans in need of legal services annually.

Funding for legal aid was increased this year, as **the NBF awarded more than \$2.2 million to pro bono organizations for community redevelopment legal services** under the terms set forth in the Bank of America settlement agreement. This funding included \$300,000 to create Nevada’s first-ever Medical-Legal Partnership (MLP).

The NBF has also honored its commitment to supporting law related education programs. **This year, the Foundation set and met its fundraising goals to host the 2018 National High School Mock Trial Championship.** Together, with the State Bar of Nevada and a Steering Committee comprised current and past board members and other volunteers, Nevada is prepared to host the 1,000+ students and family members traveling to Reno in May 2018.

Finally, through a generous donation made possible through the Charles W. Deaner living trust, the Nevada Bar Foundation will ensure continuing support of the State Bar of Nevada’s high school mock trial program. Annual dollars received through this trust will fund the program in full for the foreseeable future.

## BOARD OF TRUSTEES

### CONSTANCE AKRIDGE

President

### MARGARET WHITMAN LAMBROSE

Treasurer

### CYNTHIA ALEXANDER, Trustee

### ANN BERSI, Trustee

### MARK BRANDENBURG, Trustee

### SARAH GUINDY, Trustee

### KELLEY JONES, Trustee

### MARK KNOBEL, Trustee

### RENDALL MILLER, Trustee

### ANN MORGAN, Trustee

### LORI TEICHER, Trustee

### KIMBERLY K. FARMER

Executive Director

### LISA DREITZER

Deputy Executive Director

**BANKING PARTNERS**

- AMERICAN FIRST NATIONAL BANK
- BANK OF AMERICA
- BANK OF GEORGE
- BANK OF NEVADA
- BANK OF THE WEST
- BMO HARRIS BANK
- CITIBANK
- CITY NATIONAL BANK
- EAST WEST BANK
- FINANCIAL HORIZONS BANK
- FIRST FOUNDATION BANK
- FIRST INDEPENDENT BANK OF NEVADA
- FIRST SAVINGS BANK
- FIRST SECURITY BANK OF NEVADA
- HERITAGE BANK
- JP MORGAN CHASE & CO.
- MEADOWS BANK
- MUTUAL OF OMAHA
- NEVADA BANK & TRUST
- NORTHERN STATE BANK
- NORTHERN TRUST BANK
- PLAZA BANK
- PLUMAS BANK
- ROYAL BUSINESS BANK
- SILVER STATE SCHOOLS CREDIT UNION
- TOWN AND COUNTRY BANK
- UMPQUA BANK
- US BANK
- VALLEY BANK OF NEVADA (BNLV)
- WELLS FARGO

## IOLTA GRANT DISTRIBUTION

The Nevada Bar Foundation focuses its charitable giving on legal aid organizations that provide a variety of pro bono legal services statewide.

Thanks to the support of its participating financial institutions, the Nevada Bar Foundation granted more than \$2.6 million dollars to fund the 2018 operations of Nevada’s legal service providers.

To ensure distribution of IOLTA funds based upon population needs across the state, most IOLTA funding is distributed to a core group of legal aid organizations, including: Legal Aid Center of Southern Nevada, Nevada Legal Services, Southern Nevada Senior Law Program, Volunteer Attorneys for Rural Nevada, and Washoe County Legal Services. Secondary funding is distributed to those legal aid organizations that provide specialized services, such as domestic violence assistance and services for juveniles.

**2018 IOLTA GRANTS: \$2,665,500**

**IOLTA GRANT RECIPIENTS**

Court Appointed Special Advocates – Carson City	\$8,085
Court Appointed Special Advocates – Lyon County	\$10,106
Court Appointed Special Advocates – Northeastern Nevada	\$7,579
Domestic Violence Resource Center	\$20,212
Legal Aid Center of Southern Nevada	\$1,436,171
Nevada Legal Services	\$367,839
Nevada Rural Counties RSVP Program	\$25,265
S.A.F.E. House	\$10,106
Safe Nest	\$25,265
Southern Nevada Senior Law Program	\$204,977
Volunteer Attorneys for Rural Nevada	\$156,998
Washoe County Legal Services	\$392,895

### IOLTA GRANT RECIPIENT ACTIVITIES

The Nevada Bar Foundation distributes IOLTA grants to legal aid organizations that provide statewide delivery of pro bono legal services, ensuring that all Nevadans in need of assistance have access to justice. In the past three years, despite fluctuations in available IOLTA funding, Nevada’s legal aid organizations provided consistent levels of services to those in need.

The numbers of households represented below were served with IOLTA dollars alone (each legal service provider receives funding from multiple sources, and thus, the total number of clients served is greater than represented here). For the purpose of this report, there is one person per household.

COUNTY	2017	2016	2015
CARSON CITY	940	711	761
CHURCHILL	53	41	77
CLARK	28,400	33,500	31,331
DOUGLAS	88	70	144
ELKO	248	283	205
ESMERALDA	4	15	24
EUREKA	8	0	10
HUMBOLDT	263	269	340
LANDER	18	14	36
LINCOLN	9	8	7
LYON	190	166	169
MINERAL	228	236	331
NYE	72	100	89
PERSHING	15	31	50
STOREY	22	12	20
WASHOE	3,605	2,248	1,187
WHITE PINE	6	14	14
	<b>34,169</b>	<b>37,718</b>	<b>34,521</b>

## ANNUAL IOLTA GRANTING

<b>2018</b>	<b>\$2,665,500</b>
<b>2017</b>	<b>\$2,588,990</b>
<b>2016</b>	<b>\$2,785,917</b>
<b>2015</b>	<b>\$2,942,055</b>
2014	\$1,830,000
2013	\$1,844,901
2012	\$1,700,000
2011	\$1,601,640
2010	\$1,655,000
2009	\$1,074,500
2008	\$921,300
2007	\$906,300
2006	\$451,400
2005	\$356,500
2004	\$275,000
2003	\$265,000
2002	\$187,000
2001	\$361,000

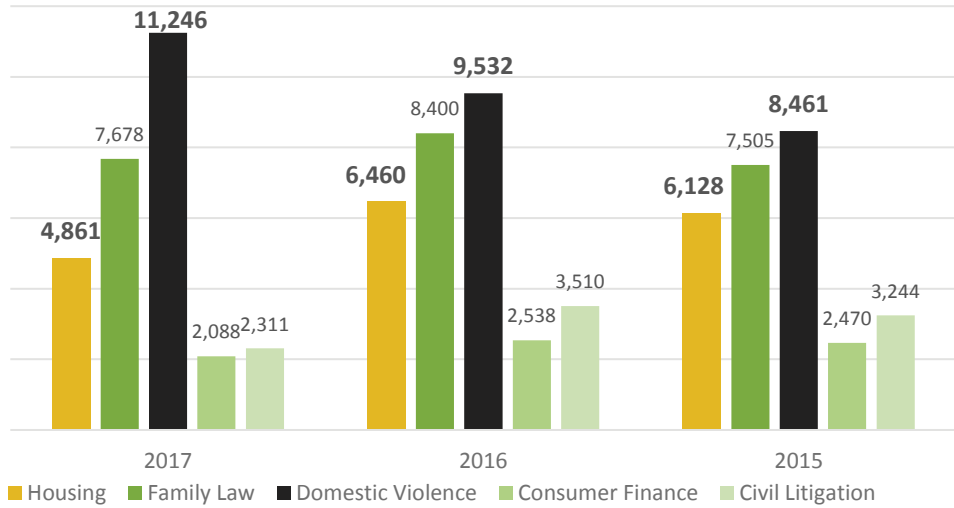
**BOLDED NUMBERS** indicate grant giving since the Nevada Bar Foundation assumed IOLTA program management

**LEGAL MATTERS**

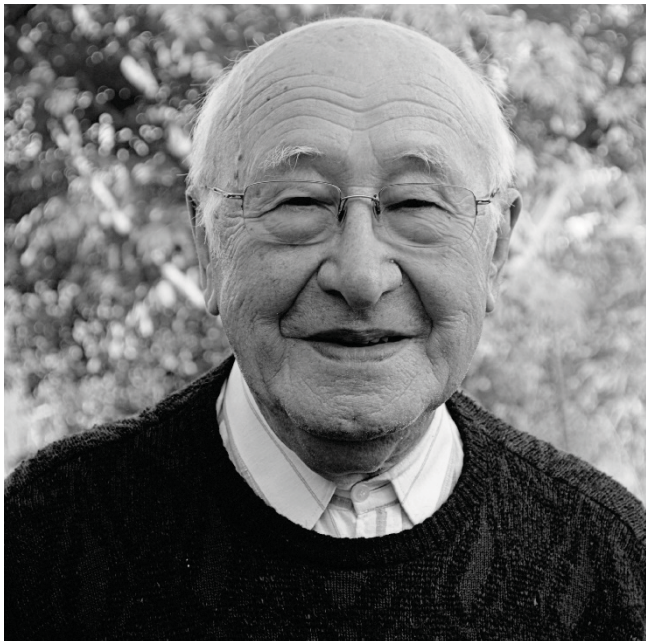
IOLTA funding supports Nevadans in need, whether they reside in urban or rural areas of the state. The support they receive through pro bono legal services can make a significant difference in their lives.

Representation can be provided through litigation or other non-traditional means, such as self-help centers.

There were **two notable changes in 2017**: a decrease in the number of housing issues from the previous two years and an **increase in the number of domestic violence matters**. This trend will continue to be examined in future grant years.



**CLIENT STORY**



Mr. M. was served with a lawsuit which stated he was being sued for more than \$12,000 for an auto deficiency. The bank claimed Mr. M. purchased and financed a 2014 Toyota Camry and stopped making payments on the car. Mr. M. did not purchase a 2014 Toyota Camry, nor did he ever finance a car loan with this bank. The Legal Aid Center attorney noted the contract attached to the Complaint was unreadable and the social security number did not match Mr. M's; yet opposing counsel refused to dismiss the case. The Legal Aid Center attorney assisted Mr. M. to file a Motion to Dismiss and successfully resolved the matter. – *Legal Aid Center of Southern Nevada*

## BANK OF AMERICA GRANTS

In 2017, the Nevada Bar Foundation awarded more than \$2.2 million to legal aid organizations that provide community redevelopment legal services under the terms set forth in the Bank of America settlement agreement. Primary funding for the one and two-year grants were made to: (1) expand Legal Aid Center of Southern Nevada’s Family Justice Project which serves victims of violence and immigrants facing deportation and; (2) expand Nevada Legal Services’ Community Development Unit, which provides legal services to non-profit organizations and small businesses in northern and southern Nevada and on Nevada’s Indian Reservations.

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*“Amy” and “John” were intravenous drug users and are HIV positive. Their permanent residence is a weekly motel. They were historically good tenants and the motel decided to sign them to a month-to-month lease. Days after signing the lease, Amy and John received rental assistance from a program specifically for HIV-positive persons. The motel manager recognized the name of the program and drew the conclusion that the tenants were HIV-positive. The motel manager suddenly initiated eviction proceedings. If Amy and John got an eviction on their record, they would not be able to rent anywhere else, even with rental assistance, and would be forced to live outside. With the MLP’s intervention, Amy and John were able to prove that the only changed factor was that the motel manager realized they were HIV-positive. They successfully fought the eviction on the basis of disability discrimination and their homelessness was prevented. – Washoe Legal Services*

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Additionally, **more than \$300,000 was granted to create Nevada’s first-ever Medical-Legal Partnership (MLP)**. Pro bono legal service provider Washoe Legal Services, partnered with a federally qualified health center, Northern Nevada HOPES, to embed a legal professional at the HOPES clinic to assist patients with health-harming social conditions that can be improved with the assistance of an attorney.

*<< See the story of “Amy” and “John” for an example of how Nevada’s first MLP assisted a couple with housing issues.*

INDIVIDUALS SERVED January – December 2017	
<b>FORECLOSURE PREVENTION LEGAL ASSISTANCE</b>	<b>150</b>
Elderly:	150
Children:	0
Veterans:	0
Number of foreclosures prevented:	27
Number of foreclosure clients benefitted in other ways:	123
<b>COMMUNITY REDEVELOPMENT LEGAL ASSISTANCE</b>	<b>1,698</b>
Elderly:	369
Children:	89
Veterans:	3
Number of non-profits benefitted:	130
Number of small business clients benefitted:	1,242

## LAW RELATED EDUCATION



### CHARLES W. DEANER LIVING TRUST

This year, the Nevada Bar Foundation was named as a recipient of the Charles W. Deaner Living Trust. Chuck Deaner passed away in February 2017 and named the Foundation, in addition to the Clark County Bar Foundation; UNLV Foundation, College of Nursing; and Gannon University as recipients. As a recipient of the Living Trust, the Foundation will receive \$1,685 monthly (\$20,220 annually).

The NBF Board of Trustees opted to dedicate the annual donation to support the State Bar of Nevada's high school mock trial program, as Chuck Deaner was a supporter of law related education. The state competition Championship Round will be named in his honor.

### 2018 NATIONAL HIGH SCHOOL MOCK TRIAL CHAMPIONSHIP

The Nevada Bar Foundation has dedicated its non-IOLTA operations to hosting the 2018 National High School Mock Trial Championship in Reno, Nevada. This is the first time Nevada has ever hosted this competition. The event is expected to bring 700 students and coaches and 400 family members to the City of Reno, where they will compete for the Championship title. The competitors will represent 48 teams from the United States of America, Guam, the Northern Mariana Islands and South Korea.



Together, with the State Bar of Nevada, the Foundation dedicated the past year to fundraising to support the event and recruitment of volunteer judges, courtroom liaisons and various event supporters. With funding goals achieved, the NBF and the National High School Mock Trial Steering Committee will focus on event logistics, including finalizing plans for team events, judge orientations, and the coordination of more than 400 volunteers needed to staff the event.

## FINANCIAL OPERATIONS

The Nevada Bar Foundation is the tax-exempt entity under SCR 216 for administering Nevada’s IOLTA program, including the distribution of grants to legal aid organizations that provide services to the poor, victims of domestic violence, and to children protected by or in need of protection of the juvenile court. In addition, the Foundation engages in non-IOLTA activities, such as fundraising to support law related education.

Staffing to support the Foundation is provided under a contract with the State Bar of Nevada and a contracted IOLTA data management service. **More than 97% of all spending is directly disbursed as IOLTA grants, with less than three percent spent on operating and contract costs.**



## FINANCIAL INFORMATION AS OF 12.31.17

(UNAUDITED)

CURRENT ASSETS	2017
	<b>\$6,267,537</b>
<b>Cash and Cash Equivalents</b>	
IOLTA	\$2,758,704
Non-IOLTA	\$532,576
IOLTA Reserves	\$800,000
Colleagues Funds	\$2,500
Bank of America Settlement	\$2,062,684
Mock Trial Fund	\$111,074
<b>Accounts Receivable</b>	<b>\$276,172</b>
<b>Prepaid Expenses</b>	<b>\$0</b>
<b>Total Current Assets</b>	<b>\$6,543,710</b>
<b>PROPERTY &amp; EQUIPMENT</b>	
Flagpole and Podium	\$11,513
Less: Accumulated Depreciation (\$6,848)	
<b>Net Property &amp; Equipment</b>	<b>\$4,665</b>
<b>TOTAL ASSETS</b>	<b>\$6,548,375</b>
<b>CURRENT LIABILITIES</b>	
Accounts Payable	\$2,679,709
<b>OTHER CURRENT LIABILITIES</b>	
Mock Trial Deferred Donations	\$0
Mock Trial Deferred Income	\$0
<b>FUND BALANCE</b>	<b>\$3,868,666</b>
<b>Total Liabilities and Fund Balances</b>	<b><u>\$6,548,375</u></b>