Dear Friends,

We are sending you this review of our mission that you might see a snapshot of the work of the Indiana Bar Foundation (Foundation). 2013 was a year of much change for your Bar Foundation with improvements to our shared mission. What mattered most? You were there with us and helped make change happen.

Thank you!

Judi Calhoun,  
President

Charles R. Dunlap, J.D.  
Executive Director

$300K

...dollars Indiana General Assembly allocated to We The People programming for this year. This public–private partnership depends on your donations to succeed.

600

...middle and high school students from Indiana attended the State Finals for We The People. Competitors from 24 teams resulted in a first-place win for students from Fishers High School for the first time leading to tears and trembling hands. Brown County Junior High School students plan to defend their national title as middle school champs. Floyd Central High School will attend the national invitational. The 2012-13 winners were: Indianapolis’ Cathedral High School (first) and Plainfield High School (wild card entrant), which placed 5th and 10th in the national finals in 2013. Their class, civility and knowledge make Indiana proud of its student competitors!

Cover photos: 2013 Indiana middle school champions Brown County Junior High School (from left photos 1 & 2).

Remaining photos: Fishers High School team members accepting their first-place trophy from Attorney General Greg Zoeller at the 2013 Indiana state finals.
More than 100 supporters gathered to celebrate civic education in December at the State Finals. Former Rep. Lee Hamilton and Justice Randall Shepard accepted the William Baker Award for bringing much public attention to the Indiana Civic Health Index and civic education. Chris Talley, Emilio Pacheco and Dane Starbuck from the Pierre F. and Enid Goodrich Foundation and the Winchester Foundation received the Dr. John Patrick Award, which honors non-attorneys for their service to civics. The Goodrich and Winchester foundations maintained and even advanced their donations during lean times for civic education and never asked for recognition.

“Training Tomorrow’s Teachers,” a weekend learning opportunity for 17 new or current We The People teachers funded by a grant from National Society of the Daughters of the American Revolution (NSDAR) and the Rushville, Ind., unit of the DAR.

Additional Youth Programs

The Foundation assisted the Indiana High School Mock Trial board with the National High School Mock Trial Competition, held in Indianapolis for the first time. The Indiana Legislative Youth Advisory Council continues to meet and issues its opinion to the legislature about how particular legislation affects young people. The U.S. Senate Youth Program sent two Indiana delegates from Munster and Columbus to the nation’s capitol for Washington Week in March and awarded two $5,000 scholarships.
PRO BONO: INCREASING ACCESS TO JUSTICE

ALLOCATIONS made for 12 pro bono districts in Indiana will total $792,500 annually for years 2013 – 2015. This safe harbor allocation is based on projections that interest rates from IOLTA may begin to rise in 2015. The figure affords your local pro bono district a measure for stable revenue planning through 2015.

REVENUES from the new $1.00 filing fee on civil cases produced $313,000 in the first six months of the 2013-14 fiscal year. The Indiana Pro Bono Commission and the Foundation’s Board of Directors approved using $230,000 of the IOLTA reserves, in addition to IOLTA annual income, to continue operations in your area pro bono district. Allocations vary by district, but careful planning projects stability in promised allocations.

With the IOLTA order renewed, the Foundation will continue to serve as the administrative manager of IOLTA as requested by the Indiana Supreme Court. The Indiana Legal answers website continues to grow demand from the public. Attorneys who want to fulfill a pro bono commitment may do so at www.inlegalanswers.org/.

Pro bono reporting approved by ISBA House of Delegates at the ISBA’s annual meeting. Your November 2013 issue of Res Gestae detailed the debate.
Helping Hoosiers with wills, guardianships and health care directives is difficult work. Doing so pro bono could make it more so. The Foundation honored six attorneys for pro bono service. Honorees were: Isaac M. Willett, Indianapolis; and five Vincennes attorneys: Jeffrey B. Kolb, J. David Roellgen, Yvette C. Kirchoff, Christopher M. Ripley and Brian M. Johnson. A seventh, Stephenie K. Gookins, Noblesville, was honored for her work on the high school mock trial program in Hamilton County with a law-related education award. The Randall T. Shepard Award for Excellence in Pro Bono Service went to David Van Gilder and Yvette Gaff Kleven, two attorneys from Fort Wayne who have provided unparalleled service to their local pro bono district, the Volunteer Lawyer Program of Northeast Indiana. You will find more information on their service at inbf.org. Please thank them for their service.

Thanks to your donations to the Richard M. Givan Loan Repayment Assistance Program, three attorneys working in civil legal aid nonprofits in Indianapolis and Merrillville received $8,000 in assistance with their student loan debts. Law school graduates have $121,000 in debt on average, 30% higher than other graduates with advanced degrees. Your help means these attorneys can continue in public service positions and help more Hoosiers who need child support, wills or other legal assistance.
Henry C. Ryder, Life Fellow, received the 2013 Legendary Lawyer Award. Ryder was honored for legal and community service with this legacy award in the legal profession. Barnes & Thornburg, LLP, hosted a reception and program for 130 colleagues, family and friends of Henry’s.

“As a new associate, I carried Henry Ryder’s briefcase into collective bargaining negotiations. We were in the middle of heated negotiations with the Teamsters Union and the union rep was getting frustrated with the company’s proposals. The rep declared to his negotiating committee, “We’re done!” He stood up to lead his “troops” out of the room. Instead of meeting fire with fire, Henry calmly reminded the rep, ‘Harry, you know that’s not our final proposal.’ Henry’s reasonable tone and demeanor completely deflated the rep’s bravado, and he slipped back into his chair. If Henry had not diffused that situation with his calm demeanor, I would bet the union would still be on strike today.”

– Attorney Donald S. Smith, Riley Bennett Egloff, as published in The Indiana Lawyer.
Cruising the Chicago shoreline, the 2013 Fellows class members enjoyed comments from Chief Justice Brent Dickson, Life Fellow, on pro bono service. Our thanks to Kenneth J. Allen, Life Patron Fellow, and his partners for helping to make a foray north a success! The accompanying list represents those Fellows who fulfilled their pledges in 2013, thereby designating them as Life members of the Fellows.
The Bar Foundation and Indianapolis Legal Aid Society invited guests to visit during an open house. The two groups now share office space.

...the Foundation's new address after the sale of the Indiana Bar Center to ICLEF. The Donald W. Jurgemeyer Fund provided capital assistance for computers and technology. Our thanks to the Heritage Fund: the Community Foundation of Bartholomew County for continuing Mr. Jurgemeyer’s legacy donation. Update your contact lists: 615 N. Alabama street, #122, Indianapolis, IN 46204. The telephone number and email remain unchanged.

Legacy gifts through wills, life insurance or retirement accounts perpetuate your impact now and in the future. The Indiana Bar Foundation thanks those of you like the late Mr. Jurgemeyer who have made a place for our shared mission in your estate planning. Contact staff to establish an endowed fund.

The Cornerstone Society shown on subsequent pages may interest you in defining further your professional legacy.
**MISSION MATTERS: FINANCIALS**

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<thead>
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<th>FY 2013 REVENUES</th>
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<td>Contributions</td>
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<td>IOLTA</td>
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<th>FY 2013 EXPENSES</th>
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<td>Programs*</td>
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<td>Administration</td>
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<td>Depreciation &amp; Other</td>
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<tr>
<td><strong>Total Expenses</strong></td>
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*Expenses reflect IOLTA/pro bono grants (programs) disbursed this year from reserve revenues acquired in prior years.

Due to rounding percentages may not equal 100%
Jack Lyle Memorial Fund

Jack Lyle (1920-2001) became executive director of the ISBA in 1969 in his third career after service in the military and as a newspaper executive. Recognized by his peers with the Bolton Award as the best Bar executive in the country, Jack was an early proponent of the Bar’s involvement in the We The People program of civic education. This Fund supports civic education in Indiana.

Joseph T. Helling Scholarship Fund

Established by his children, the Joseph T. Helling Scholarship Fund assists an attorney who has practiced fewer than five years by underwriting his or her attendance at the ISBA’s annual meeting. Mr. Helling was a proponent of professional development and believed strongly in the collegial relationships formed at Bar events. The Scholarship funds the applicant’s registration fee, lodging, meals and travel expenses, and it underwrites family participation in the annual meeting. Ask for more details about eligibility criteria or visit www.inbf.org.

Hon. J. Terrence and Peggy Cody LRAP

This Fund enables graduating law students to pay for their law school loans and be employed at civil legal aid providers, county Department of Child Services offices and county Public Defender’s offices throughout Indiana, with preference given to those employed or living in Floyd County, Indiana.

DESIGNATED FUNDS

Legacy gifts through wills, life insurance, retirement accounts or other financial vehicles perpetuate your impact now and in the future. The Indiana Bar Foundation thanks those of you who have made a place for our shared mission in your estate planning. The following Funds are available to receive your gifts today if they match your interests. Contact staff to establish a new Fund that fulfills your goals for the legal profession.
Indiana Lawyers Alliance Law School Scholarship Fund

The Indiana Lawyers Alliance aided the legal profession and the ISBA through various service projects for many years, yet like many organizations found its mission waning as the demographics of the profession and society changed. The Alliance established this Fund with its remaining treasury when it disbanded. This Fund assists a law student with a scholarship and rotates among Indiana’s ABA-accredited law schools. It emphasizes community service, academic record, need and intention of staying in Indiana after graduation.

Phelps & Fara Family Law Fund

After many years of successful solo practices where they formerly represented opposing clients, Gale Phelps and Thomas Fara joined their practices. Both were active members in the Family Law section of the ISBA, demonstrating their commitment to the professionalism of family law by helping other attorneys and leading CLEs on various family law topics. The Phelps & Fara Fund assists a law student studying the field of family law.

Richard M. Givan Loan Repayment Assistance Fund

Established in 2009 in honor of the late Chief Justice Richard M. Givan and his commitment to public service, this Fund assists attorneys working in legal aid and pro bono organizations or other nonprofits. The Fund assists these legal aid or nonprofit attorneys who make less than $50,000 annually with repayment of student loans for law school or undergraduate education. The goal is to ensure that pressure from educational debt does not deter service to Hoosiers needing free legal assistance.

Randall T. Shepard Fund for Diversity in the Legal Profession

Established in 2011 upon Chief Justice Shepard’s retirement from the Indiana Supreme Court, the Shepard Fund for Diversity in the Law Profession has a mission to do as it name describes. The beneficiaries of this Fund are: Indiana Conference for Legal Education Opportunity (ICLEO) and the Indiana Supreme Court’s Commission on Race and Gender Fairness. ICLEO was established to assist Indiana minority, low-income or educationally disadvantaged college students to pursue a law degree. More details on these programs are available by request.

Shirley Ann Shideler Fund

Shirley Ann Shideler, who began as a legal secretary at Barnes & Thornburg, LLP, became the first female partner of any major law firm in the state of Indiana, and the first female president of the Indiana Bar Foundation. At a time when women in the law were a rarity, Shirley entered the Indiana University School of Law as a single parent in her 30s, graduated with distinction in 1964, and launched a legal career that would span four decades and be marked by extraordinary contributions to her clients, her community, her colleagues and her profession. This Fund supports the areas of greatest or unmet need the Foundation has.
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