

# ANNUAL REPORT

2015-16

## Message from 2015-16 President Donny MacKenzie

**O**n June 16, 2016, The Florida Bar Foundation board of directors unanimously resolved to execute a “strategic reset.” This decision came about as the result of eight years of drastically reduced revenue from Florida’s Interest on Trust Accounts (IOTA) Program, which almost a decade ago reached a high of approximately \$44 million per year but has been reduced to less than \$6 million annually for the past several years.

At least 3.1 million Floridians live at or below the poverty level, which does not include the working poor whose incomes exceed federal poverty guidelines, but who can’t afford a lawyer. While \$44 million dollars in funding is a lot of money in many respects, it amounts to \$14 per every person living at or below the poverty level. Current IOTA funding of \$5.5 million dollars equates to \$1.77 for each such person. Thus, it’s easy to see that even at its highest levels, IOTA funding touches only a very small fraction of the need.

Clearly, IOTA funding alone has never been the solution. Resources in addition to increased funding need to be developed in order to adequately address the problem and confront the challenge. Current funding sources, delivery models and grant evaluation methods must be looked at carefully. Results, benchmarks, measurable outcomes,

efficiencies, redundancies and accountability measures need to be studied and changed where necessary. Best practices and successes need to be replicated and encouraged. Technology needs to be embraced and harnessed.

The simple reality is that most Floridians, including the working poor but also many in the middle class, simply cannot afford an attorney. The Foundation’s overarching objective is to assist everyone by increasing access to justice. As to its existing grantees, the Foundation’s objective is to enable and empower them to become more self-sustaining.

As to The Florida Bar, the Foundation’s goal is to complement, not compete with, working lawyers seeking to provide greater access to the courts. The Foundation will continue to be an information resource and partner in initiatives to increase access to justice. It will also continue to identify and share best practices and assist the Bar in its statewide efforts, as well as collaborate and lead on projects consistent with our core mission principles.

The Foundation has always drawn on its most valuable resources: its people; its mission; its collective genius; and its undaunted commitment to the rule of law. From the staff to the board, professionalism and civility are the hallmarks of this



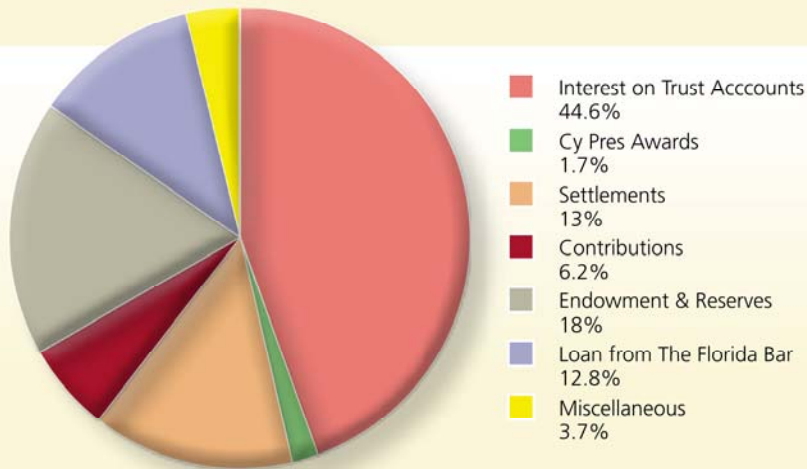
Donny MacKenzie

organization. Experience and wisdom are the bricks and mortar that make up our foundation and establish us as “catalytic philanthropists,” as described by Mark R. Kramer in the fall 2009 issue of the Stanford Social Innovation Review.

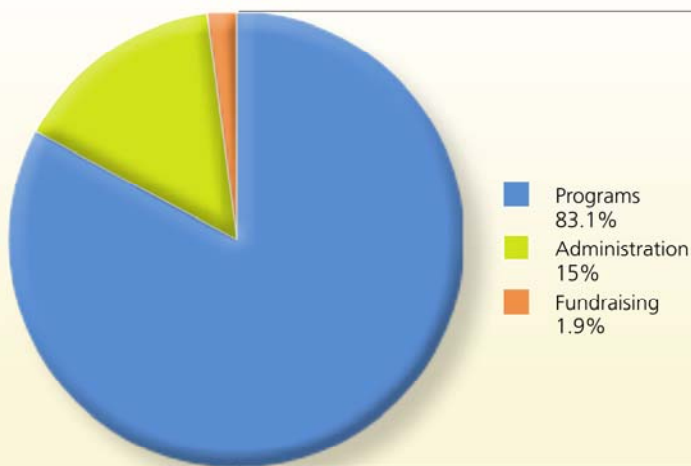
Throughout the course of its history, The Florida Bar Foundation has exhibited the ambition and courage to improve access to justice by promoting collaboration and innovation. And not only have we used all available tools to create change, but in many notable instances, such as the very creation of IOTA, we have invented those tools for ourselves and others. We have created actionable knowledge that has improved our effectiveness and influenced the behavior of others. And along the way, we have helped pave the path toward social justice.

It was my extreme honor to have helped move the Foundation forward during 2015-16, and I thank everyone for their undaunted courage and continuing support of the Foundation and the overall cause of justice for all. Thank you.

## 2015-2016 FUNDING SOURCES



## HOW WE SPENT THOSE FUNDS IN 2015-2016



### PROGRAMS:

|   |                     |
|---|---------------------|
| Grants*   | \$10,385,853        |
| Loan Repayment Assistance for Legal Aid Attorneys | \$814,082           |
| Pro Bono Partnerships Program*                    | \$145,399           |
| Capacity-Building for Grantees                    | \$204,877           |
| Special Projects                                  | \$242,604           |
| Justice System Technology                         | \$276,977           |
| Incentive Awards for Legal Aid                    | \$46,502            |
| <b>Total</b>                                      | <b>\$12,116,294</b> |

\* includes grants and pro bono program salaries and administrative costs

## MAKING STRATEGIC INVESTMENTS IN FLORIDA'S CIVIL LEGAL AID AND JUSTICE SYSTEMS

The Florida Bar Foundation makes strategic investments to build the capacity of its grantees and of Florida's civil justice system. This includes planning and hosting statewide training and conferences, as well as covering expenses for certain legal aid staff to attend national events such as the Legal Services Corporation's Technology Innovations Grant (TIG) conference, the Equal Justice Conference, the National Legal Aid and Defender Association's annual conference and others.

In November 2015 the Foundation hosted a statewide Legal Aid Summit to introduce nearly 200 legal aid staff to design thinking for access-to-justice problem-solving under the guidance of Stanford Center for Legal Design Director Margaret Hagan and emerging legal aid leaders from around

Florida. That fall the Foundation also secured a pro bono business process improvement partnership for Florida Rural Legal Services (FRLS) with a multi-national corporation. The Toyota Production System Support Center, Inc. team spent a year working with FRLS to analyze and streamline their intake process prior to and during the installation of centralized telephone intake systems technology that had been funded by the Legal Services Corporation.

Special projects in 2015-16 also included all pre-launch and start-up activities for the Florida Justice Technology Center, which was established with a Florida Bar Foundation Improvements in the Administration of Justice grant. Along with the Foundation, this new center has been instrumental in the development of the Florida Legal Access Gateway, the signature

project of the Florida Commission on Access to Civil Justice. Settlement funds provided to the Foundation by Attorney General Pam Bondi's office covered the cost of the Clay County pilot for this new online legal triage system, which uses expert systems technology to guide users to the legal resources best suited to their needs.

Also in 2015-16, the Foundation worked closely with its legal aid grantees to develop outcome measures and incorporate them into LegalServer, the case management system the Foundation had previously invested in for its grantees and continues to help support. The outcomes information collected will help the Foundation and its grantees make more strategic decisions in the future as well as build a compelling case for financial support for civil legal aid.

# Annual Giving Circles - FY 2015-2016

Cumulative annual giving from July 1, 2015, to June 30, 2016

| Counselor's Circle<br>(\$50,000 - \$99,999)   | Bronze Circle<br>(\$2,000 - \$4,999)   | Leadership Circle<br>(\$1,000 - \$1,999)   |  |
|---|--|--|--|
| Florida Bar Family Law Section<br>Florida Bar Business Law Section<br>Florida Bar Appellate Practice<br>Section   | Akerman LLP<br>Berger Singerman LLP<br>Buchanan Ingersoll & Rooney PC<br>Burr & Forman LLP<br>Coker, Schickel, Sorenson,<br>Posgay, Camerlengo & Iracki, PA<br>Mary G. Evertz▼<br>Kevin T. Gay<br>Gray Robinson, P.A.<br>Hill, Ward & Henderson, P.A.<br>Miles A. McGrane, III▼<br>Melissa A. Moss▼<br>Thomas R. Oldt▼<br>Parks & Crump, LLC<br>Peterson & Myers, P.A.<br>Susan & Stanley M. Rosenblatt▼<br>David B. Rothman▼<br>Searcy, Denney, Scarola,<br>Barnhart & Shipley P.A.<br>Hon. Patricia A. Seitz▼<br>William A. Van Nortwick, Jr.▼<br>Helen Von Dolteren-Fournier▼ | Patricia Acosta▼<br>AMGEN PAC<br>Anonymous▼<br>Rosemary E. Armstrong▼<br>Bennett & Arlene Brummer<br>Community Fund<br>Bruce B. Blackwell▼<br>Imani A. Boykin▼<br>Hon. Catherine M. Brunson▼<br>Walter G. Campbell, Jr.▼<br>John P. Cardillo▼<br>Jay M. Cohen<br>Father C. Timothy Corcoran, III<br>Garrett Cutler<br>Amber N. Davis▼<br>Moises T. Grayson<br>Alan G. Greer▼<br>Michael J. Grindstaff▼*<br>Eric J. Hall▼<br>Robert G. Kerrigan▼<br>Elizabeth M. Knoblock<br>William Lawton▼<br>Hon. Thomas W. Logue▼<br>Dominic C. MacKenzie▼<br>David Manz▼<br>Charles R. Mathis, IV▼ | Hon. Raymond McNeal▼<br>Hon. James S. Moody, Jr.▼<br>Lou Ann Powell▼<br>Sanford Reinhard<br>Richard and Richard, P.A.<br>James C. Rinaman▼<br>Catherine A. Roth<br>Keith E. Rounsaville▼<br>Gerold L. Schiebler, M.D.<br>Stephen R. Senn▼<br>Detra Shaw-Wilder▼<br>L. David Shear▼<br>Pamela Simonton<br>Mark E. Stein▼<br>Jane Sullivan▼<br>Terrell Hogan<br>Adrian P. Thomas<br>Hon. Emerson R. Thompson, Jr.▼<br>Hon. Christi L. Underwood▼<br>Kirsten Vignec▼<br>Charles T. Wells▼<br>Carol A. Wherry▼ |
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| Florida Bar Criminal Law Section  |  |  |  |
| Gold Circle<br>(\$10,000 - \$24,999)  |  |  |  |
| John A. Noland▼<br>Larry S. Stewart▼  |  |  |  |
| Silver Circle<br>(\$5,000 - \$9,999)  |  |  |  |
| Carlton Fields, P.A.<br>Florida Lawyers Mutual<br>Insurance Company<br>Maria E. Henderson▼<br>Holland & Knight LLP<br>John Patterson▼<br>Shutts & Bowen LLP |  |  |  |

▼ FBF Fellow



## Thank you to our Fellows

Florida Bar Foundation Fellows, our core supporters, pledge \$1,000 payable over five years, or over 10 years for young, government or nonprofit lawyers. To learn more about the Fellows Program, to make your Fellows pledge, or to see a list of Florida Bar Foundation Fellows, visit [www.TheFloridaBarFoundation.org/Fellow](http://www.TheFloridaBarFoundation.org/Fellow)

## NEW FELLOWS 2015-16

July 1, 2015 to June 30, 2016

|                         |                          |                             |
|-------------------------|--------------------------|-----------------------------|
| Zascha Abbott           | Jason E. Havens          | Darcie A. Owens             |
| Patricia Acosta         | Hon. Hugh D. Hayes       | Woodrow H. Pollack          |
| Amy Beller              | Nicole V. Hessen         | Ronald Rosen                |
| Imani A. Boykin         | William Lawton           | Keith E. Rounsaville        |
| Bennett H. Brummer      | Hon. Thomas W. Logue     | Alex J. Saiz                |
| Walter G. Campbell, Jr. | Maxine M. Long           | Steven Salzer               |
| Min Cho                 | John Macdonald           | Detra Shaw-Wilder           |
| Genie Cooke*            | Raquel Matas             | Michael Silver              |
| Margaret Cooper         | Charles R. Mathis, IV    | Donna G. Solomon            |
| Amber N. Davis          | Clifford W. Mayhall      | Mark E. Stein               |
| Hon. Caryl E. Delano    | Jessica McCabe           | Gary I. Teblum              |
| Katherine C. Donlon     | Hon. Raymond McNeal      | Hon. Christi L. Underwood   |
| Guy S. Emerich          | Hon. Ashley B. Moody     | Kirsten Vignec              |
| Gail G. Fagan           | Hon. James S. Moody, Jr. | Helen Von Dolteren-Fournier |
| Hon. Peter T. Fay       | Angela Morrison          | Hon. Kevin Weiss            |
| Richard A. Gilbert      | Hon. Donald A. Myers     |                             |
| Alan G. Greer           | Noemi E. Orsini          |                             |

\*Deceased



# Investing in access to justice for a brighter tomorrow

You, our donors, are investors in America's promise of justice for all. It's a promise we as a nation have not quite figured out how to keep. The right to counsel does not exist for those with civil legal problems. In Florida, state funding for civil legal assistance has been zeroed out. Federal funding, administered by the Legal Services Corporation, is limited and subject to Congressional restrictions. Interest on Trust Accounts revenue has fallen victim to the global recession and its after-effects. For these reasons, low-income Floridians in need of civil legal aid now rely on your generosity to a greater extent than ever before. On behalf of the tens of thousands of Floridians whose futures are now brighter because of free civil legal aid they received this year, we thank you. And we give special thanks to those of you who have earned membership in The Legacy for Justice.

## The Legacy for Justice

Through June 30, 2016

The Legacy for Justice recognizes those who have included the Foundation in their estate planning, made a single planned or pledged gift of more than \$10,000, directed a significant cy pres award to the Foundation, or facilitated a colleague's major gift. We offer the members of this prestigious group our sincerest gratitude for their deep and abiding commitment to the Foundation.

Louie Adcock▼

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Anonymous Fund Central Florida Foundation

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The Florida Bar Criminal Law Section

The Florida Bar Family Law Section

The Florida Bar General Practice, Solo and Small Firm Section

The Florida Bar Real Property, Probate & Trust Law Section

The Florida Bar Trial Lawyers Section

The Florida Bar Young Lawyers Division

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The Flourish Fund of Gulf Coast Community Foundation

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\* Deceased



After being placed in foster care following her father's suicide, "Stephanie Davis" of Miami was able to pursue her dream of attending art school in New York City thanks in large part to help she received from Miami Law's Children & Youth Law Clinic. Although she asked that her real name not be used, she agreed to be pictured with her art.

## Batchelor Foundation continues support of University of Miami children's clinic

The Children & Youth Law Clinic at the University of Miami School of Law has been supported since 2004 by a Children's Legal Services grant from The Florida Bar Foundation. Beginning in 2014, the clinic has received three special grants of \$100,000 each from The Florida Bar Foundation with funds provided by the Miami Beach-based Batchelor Foundation, which has long focused on health-related needs of children. With each of its gifts The Batchelor Foundation has honored Miami Law alumnus and past Florida Bar President Burton Young, who was both attorney and friend of the late aviation entrepreneur and philanthropist George E. Batchelor. The clinic represents children in foster care and former foster youth in dependency, health care, mental health, disability, independent living, education, immigration and other general civil legal matters, ensuring that they have a voice in court proceedings. Under the supervision of three Florida-licensed attorneys, approximately 24 second- and third-year law students each year assume primary responsibility for all aspects of a client's case. Students learn fundamental lawyering skills, substantive law and professional ethics.

# Summer Fellows program revival provides meaningful giving opportunity

The Florida Bar Foundation has launched a campaign to raise \$150,000 to revive its Summer Fellows program, which places law students at Florida legal aid organizations to develop projects in areas of need such as homelessness, juvenile justice and medical-legal partnerships.

Florida Bar Foundation board member Stephen R. Senn of Peterson & Myers in Lakeland recently contributed \$2,500 toward an effort to revive the program, which had to be suspended in 2012 due to

a lack of funds. His gift follows a \$50,000 campaign kickoff pledge from fellow board member David Prather of Clark, Fountain, La Vista, Prather, Keen & Littky-Rubin in West Palm Beach.

In a survey of past Summer Fellows participants, one said “The Florida Bar Foundation summer fellowship program literally made me who I am today as an attorney,” while another said it “cemented for me that a career in legal aid could be a reality.”



Jarred Reiling, now an associate with Gelber Schachter & Greenberg in Miami, was a Florida Bar Foundation Summer Fellow at the Legal Aid Society of Palm Beach County in 2009.

Want to make a gift to support the reestablishment of the Foundation’s Summer Fellows Program? Contact Development Director Donna Marino, CFRE, at (407) 960-7000 or [dmarino@TheFloridaBarFoundation.org](mailto:dmarino@TheFloridaBarFoundation.org)

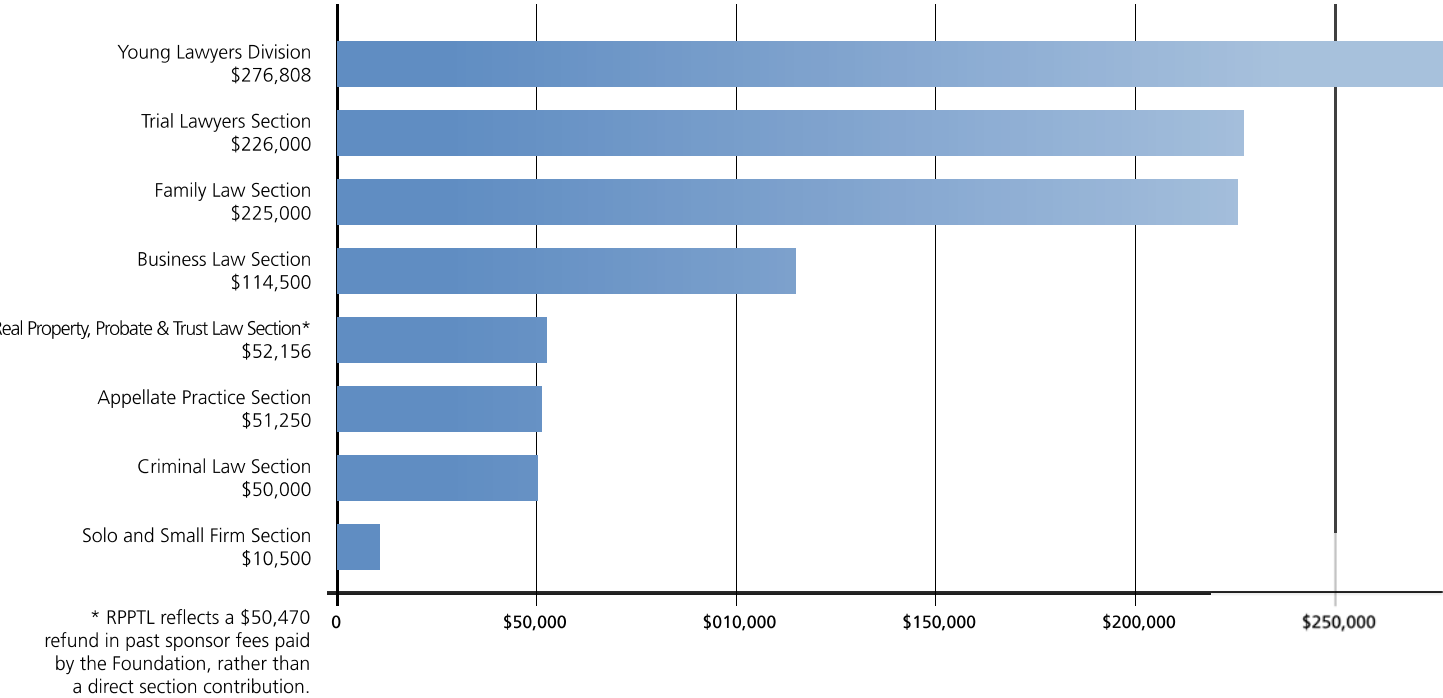
## Business Law Section pro bono committee makes \$10,000 gift

Under the leadership of its chair, John B. Macdonald, the pro bono committee of The Florida Bar Business Law Section made a \$10,000 gift to The Florida Bar Foundation to support staffing to expand pro bono opportunities for transactional attorneys statewide through the Foundation’s recently established Pro Bono Partnerships Program. Business Law Section communications chair and Foundation board member Paige Greenlee presented the check March 17

during the Foundation’s quarterly board meeting. The program works to develop pro bono partnerships with bar associations, law firms, courts, law schools and legal aid organizations. It also provides technical and expert support for organizations creating, implementing or analyzing pro bono programs. The Business Law Section is one of many Florida Bar sections and divisions that has made major gifts to The Florida Bar Foundation, placing them in the Foundation’s prestigious Legacy for Justice.



## Lifetime contributions from Florida Bar Section and Divisions 10K and up





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