

ANNUAL REPORT

THE FLORIDA BAR FOUNDATION

2019-20

Message from 2019-20 President Hala A. Sandridge

I always knew it would be a privilege to serve as president of The Florida Bar Foundation. What I did not know—and could never have anticipated—were the challenges the Foundation would face from the COVID-19 pandemic.

My presidency started out as normal, with our September board meeting in 2019. The in-person conference in Tampa was full of energy, ideas and excitement. The Foundation moved toward a new board meeting format, with law firms sponsoring the meetings and fronting expenses to reduce Foundation administrative costs. These meetings were also designed to “ride the circuit”—rather than maintain a constant Orlando location—so that legal services stakeholders around the state could more easily attend Foundation board meetings in their locale. The new format was wildly successful. I thank my law firm, Buchanan Ingersoll & Rooney, for carrying the expense of that first newly-formatted board meeting.

All changed with the March 2020 board meeting. If you are reading this article, you know how your life drastically changed around that time, too. The Foundation board meeting moved to a virtual format. Looking back on that meeting, I recall how foreign I considered the Zoom platform and how optimistically I thought our June board meeting would be in-person at The Florida Bar Annual Convention.

Equally difficult, many of the Foundation staff normally working in its Maitland office

were forced to work remotely. As of the time you read this article, we continue to hold our board meetings virtually and many staff work remotely. Gone were the days of in-person brainstorming, team work, and camaraderie for which the Foundation is so well known.

It is a testament to the hard work of the Foundation staff that we were able to keep our grants and funding cycles in place, along with all other business of the Foundation, through a remote work environment.

COVID-19 not only changed how the Foundation conducted its business, but it drastically affected the legal organizations the Foundation funds. Many of the grantees sought immediate funding for COVID-19 relief. The Foundation quickly pivoted its funding resources and issued new COVID-19 grants to allow grantees to address a slew of pressing legal issues—such as evictions, unemployment, domestic violence, and healthcare—amounting to \$1,454,993 in immediate aid.

The Foundation faced other non-pandemic challenges. Interest rates—the mainstay of IOTA funds—continued their historic lows, forcing the Foundation to continue its search for other funding sources. But good things happened, too. The board’s wise investment decisions and a hot financial market increased the value of the Foundation’s investments.

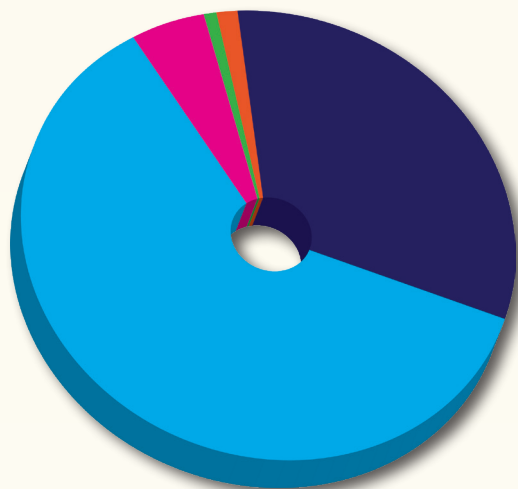
The highlight of my presidency was bestowing the Foundation’s 2020 President’s Award. The federal judges of the Jacksonville



division of the Middle Division of Florida’s federal courts entrusted \$3.6 million to the Foundation for distribution to legal service organizations located within the Middle District. The Foundation honored those judges—the Honorable Timothy J. Corrigan, Honorable Roy B. Dalton Jr., Honorable Marcia Morales Howard, and Honorable William G. Young—for their commitment to access to civil justice. Although the Foundation’s awards are usually presented during the June Florida Bar Annual Convention, the Foundation staff created an amazing virtual award ceremony for all to attend in the fall.

Not only do I thank the judiciary, but I thank all of you, dear readers, for your support and assistance with the Foundation’s mission of ensuring access to legal services.

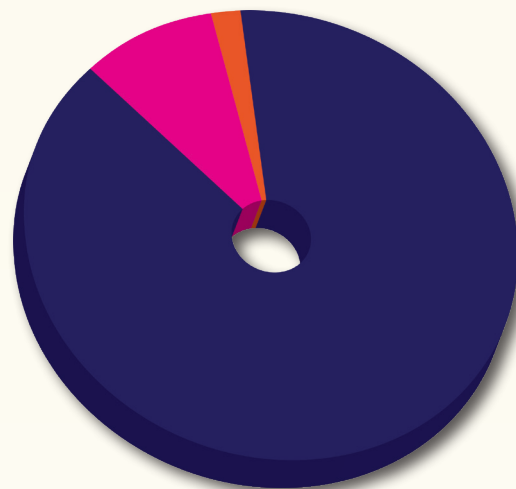
FUNDING SOURCES FOR 2019-20 GRANTS



61.1% BOA/Engle Awards
31.9% IOTA Revenue
5.0% Private Contributions

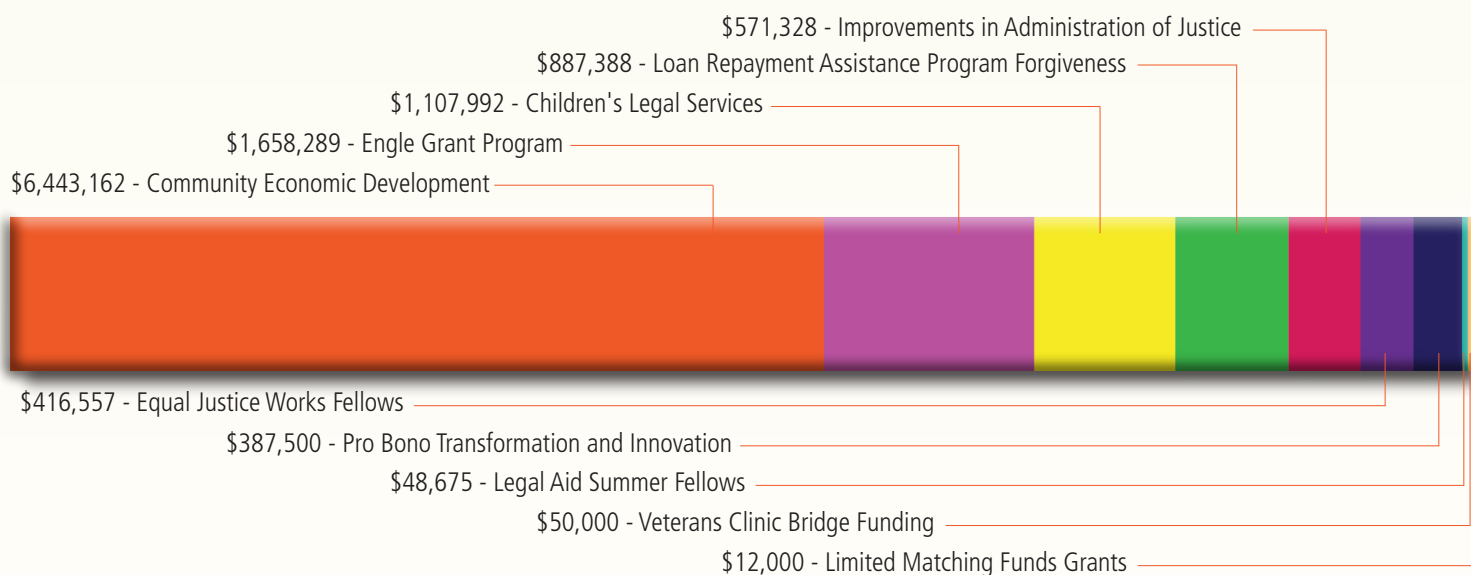
1.2% Net Investment Income
0.8% Cy Pres Awards

HOW FUNDS WERE SPENT IN 2019-20



89.0% Charitable Activities (\$12,454,231)
9.3% Administration (\$1,305,896)
1.7% Fundraising (\$240,138)

GRANTS AWARDED IN 2019-20

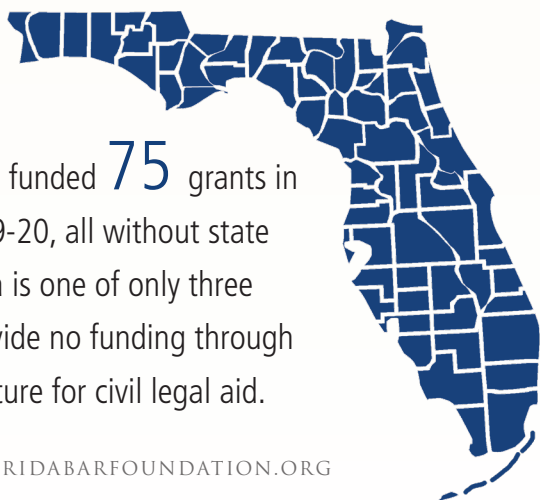


In addition to the grants awarded, the Foundation spent \$889,580 in program support and other charitable activities that provided direct and indirect support to our grantees. Also, \$18,238 in unspent grant funds were returned to the Foundation.

99,375 legal aid cases were handled by grantees in calendar year 2019.



The Foundation funded **75** grants in fiscal year 2019-20, all without state funding. Florida is one of only three states that provide no funding through its state legislature for civil legal aid.



The Legacy for Justice

The Legacy for Justice recognizes those who have included the Foundation in their estate planning, made a gift or pledge 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. (Through April 8, 2021)

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