I am pleased to report the Foundation’s progress during 2002-03 in awarding grants of more than $131.1 million. In that endeavor, it has been my great pleasure to work with the devoted and enthusiastic staff of the Foundation and the inspirational lawyers from Pensacola to Jacksonville to Tampa to Miami who have worked throughout the year to make the Foundation’s grantmaking so successful.

The chief beneficiary of our grantmaking continues to be Florida’s network of dedicated civil legal assistance organizations operating in all 67 Florida counties. Whether through our general support and special purpose grants, our on-site grantee evaluation program, our efforts to promote leadership development in the legal assistance community or programs such as loan repayment assistance, which make public service employment possible for today’s law graduates, the Foundation is working to help make the promise of equal access to justice a reality in Florida.

I’m happy to report as well that gifts from lawyers through the Lawyers’ Challenge for Children on the annual Florida Bar Fee Statement and from other donors have increased funding for special initiatives such as the Children’s Legal Services grant program. This program provides legal advocacy and representation to uphold children’s legal rights to educational and other services — services for children put into place to promote their growth into productive adults.

Again this year, the Foundation administered funds appropriated by the state under the Florida Access to Civil Legal Assistance Act. One and one-half million dollars were appropriated to continue pilot projects in seven judicial circuits. Although less than last year, this funding continues the partnership between the state and the thousands of Florida attorneys who give generously each year of their time and money to support legal services.

Another area of Foundation grantmaking supports projects to improve the administration of justice in Florida. Although this is a small grant program, it’s often the only source of funds for local courts, bar associations and other groups to test ways to make the justice system more responsive. Because this discretionary grant program generally is limited to demonstration projects or seed money, it’s been aptly referred to as one of the few sources of venture capital for the justice system. For example, Team Child, a three-year demonstration project, showed that we can reduce juvenile recidivism when the public defender teams up with a legal services program to address basic family stability issues such as domestic violence, housing and public benefits, in addition to focusing on the special needs of the child such as learning disabilities and access to health care.

We also use our funds to promote the concept of public service to law students through the Legal Services Summer Fellowship and Public Service Fellows programs. The feedback we have received about these programs is positive both in terms of the organizations served and the growing number of law students committed to using their legal skills to assist the less fortunate. Especially today, it is gratifying to see that law students increasingly understand a lawyer’s responsibility to their community.

A real bright spot in the year was the victory for Interest on Lawyers Trust Accounts (IOLTA) programs in the United States Supreme Court. On March 26, 2003, the U.S. Supreme Court issued its decision in Brown v. Legal Foundation of Washington, Inc., upholding the constitutionality of IOLTA under the Just Compensation Clause of the Fifth Amendment. In its ruling, the Supreme Court held that even assuming the interest generated on IOLTA accounts amounted to a per se taking that taking was for a valid public use and the amount of just compensation due was zero. As a result, the Supreme Court found that the operation of the IOLTA program in Washington does not violate the Fifth Amendment. The decision, of course, also supports our IOLTA program in Florida.

The continued decline in bank interest rates again prevented us from realizing a greater result from the 2001 IOLTA rule amendments. The amendments require that financial institutions offering IOTA accounts pay the highest interest rate or dividend generally available to their similarly-situated non-IOTA account customers. The amendments also approved government money market accounts, in addition to sweep accounts and interest checking accounts, for IOTA funds. We are pleased, however, that a major brokerage firm has.test marketed its new IOTA product and expects to roll it out statewide in 2004. In all, we are grateful that Florida financial institutions continue to work well with the Foundation to further the goals of the IOTA program.

Of course, lower interest rates have made our fundraising efforts more critical to maintaining stability in Foundation grants. This year saw a very successful recruiting campaign for Foundation Fellows in Tallahassee with more than $198,000 in Fellows’ pledges added to the Foundation’s Endowment, and 176 individuals becoming a Fellow with a $1,000 pledge payable over five years. So, when a Foundation director or other volunteer asks you to become a Foundation Fellow or support our mission in other ways, I ask you to say yes.

President, 2002-03
WILLIAM L. THOMPSON

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President, 2002-03
WILLIAM L. THOMPSON
The Foundation’s Legal Assistance for the Poor (LAP) grant program, supported primarily by IOTA funds, provides general support and special purpose grants to a network of organizations providing free civil legal services to the poor. Together, this network provides at least basic access to the justice system for low income individuals and families residing in every county in Florida. LAP grants also support legal assistance for specific client services and to serve specific client groups.

In fiscal year 2002-03, the Foundation awarded 36 grants in support of legal aid organizations serving every Florida County:

1. American Friends Service Committee Central American Public Aylar Program Miami $106,422.00
2. Bay Area Legal Services Tampa $556,769.00
3. Brevard County Legal Aid Rockledge $69,583.00
4. Central Florida Legal Services Daytona Beach $420,762.00
5. Community Law Program St. Petersburg $41,040.00
6. Cuban American Bar Association Pro Bono Project (Administered by Florida Immigrant Advocacy Center) Miami $27,297.00
7. Dade County Bar Association Office of Public Service Volunteer Lawyers Miami $296,626.00
8. Florida Immigrant Advocacy Center Miami $585,078.00
9. Florida Institutional Legal Services $297,126.00
10. Florida Justice Institute Miami $223,216.00
11. Florida Legal Services Tallahassee $1,415,000.00
12. Florida Legal Services Migrant Farmworker Justice Project Tallahassee $491,713.00
13. Florida Legal Services Statewide Training Grant Tallahassee $165,000.00
14. Florida Rural Legal Services Lakeland $617,930.00
15. Florida State University College of Law Pro Bono Project Tallahassee $2,500.00
16. Greater Orlando Area Legal Services Orlando $194,494.00
17. Guardianship Program of Dade County Miami $54,594.00
18. Gulf Coast Legal Services St. Petersburg $449,539.00
19. Heart of Florida Legal Aid Society Bartow $92,198.00
20. Jacksonville Area Legal Aid Jacksonville $334,814.00
21. Lee County Legal Aid Society Fort Myers $46,177.00
22. Legal Aid Foundation of the Tallahassee Bar Association Tallahassee $320,228.00
23. Legal Aid Service of Broward County Ft. Lauderdale $412,332.00
24. Legal Aid Society of Palm Beach County West Palm Beach $290,053.00
25. Legal Aid Society of the Orange County Bar Association Orlando $381,722.00
26. Legal Aid Society of Manasota Sarasota $15,821.00
27. Legal Services of Greater Miami Miami $533,803.00
28. Legal Services of North Florida Tallahassee $406,015.00
29. Legal Services of North Florida Pensacola $209,813.00
30. Nova Southeastern University/Sheppard Broad Law Center Ft. Lauderdale $2,500.00
31. Seminole County Bar Association Sanford $52,076.00
32. Southern Legal Counsel Gainesville $192,324.00
33. St. Thomas University School of Law Immigrant Families Assistance Project Miami $2,500.00
34. Stetson University College of Law Combined Civil Clinics St. Petersburg $2,500.00
35. Three Rivers Legal Services Gainesville $297,535.00
36. University of Florida College of Law Virgil Hawkins Civil Clinic Gainesville $2,500.00
37. University of Miami School of Law Combined Civil Clinics Miami $2,500.00
38. Withlacoochee Area Legal Services Ocala $257,593.00

Total $9,540,097.00

Foundation Legal Assistance for the Poor Grants Support a Wide Variety of Pro Bono Services by Members of The Florida Bar

Pro bono hours donated by members of The Florida Bar through organized pro bono programs in 2002 represented 17% of all cases — nearly 18,000 — closed by Foundation legal aid grantees. Foundation funds primarily support the intake and referral of cases to pro bono volunteer attorneys and to provide such volunteers with backup support and training.

While much of the time donated by pro bono attorneys was in family law cases, there is a wide variety of pro bono service opportunities for Florida attorneys. To name just a few:

- Transactional attorneys helping community groups develop affordable housing
- Handling small probate matters
- Representing children in dependency proceedings
- Co-counseling cases with legal aid attorneys in housing and consumer law and assisting particularly vulnerable clients, such as the elderly, the disabled and the mentally ill
- Serving as mentors to less experienced legal aid attorneys
- Doing client intake
- Participating in community legal education programs such as being a panelist at a seminar on domestic violence or speaking to the elderly about protection of their homesteads

The benefits of involving members of The Florida Bar in serving the legal needs of the poor extend well beyond the positive outcomes for individual clients, because attorneys make things happen. When talent and commitment are applied to removing the legal barriers poor people face in stabilizing their lives, entire communities benefit. The Foundation encourages its Legal Assistance for the Poor grantees to continue to expand the scope of pro bono opportunities they offer private attorneys in their communities.
How Legal Assistance Grantees Have Helped This Year

**Family Matters:**
- 37,483 Cases (36%)
- A mother of three suffering from multiple sclerosis was abandoned by her husband, who also refused to provide any financial support for her or their children. She achieved emancipation status by her legal aid and negotiated a settlement that ensured her ability to stay in her home.
- Florida Rural Legal Services

**Housing Matters:**
- 18,074 Cases (17%)
- An elderly widow sought assistance from legal aid after being threatened with eviction by her homeowners’ association for using an “illegal” wheelchair ramp.
- Legal aid represented her in a dissolution of marriage proceeding in which the judge ordered that the father pay child support and alimony.
- Legal Aid Society of Collier County

**Individual Rights:**
- 16,043 Cases (15%)
- A 41-year-old immigrant fled his home country of Guatemala after being kidnapped, beaten and tortured because of his political activities. Legal aid advocated on his behalf before the Immigration and Naturalization Service, and he was granted asylum and the right to remain in the United States.
- American Friends Service Committee

**Consumer Matters:**
- 8,832 Cases (8%)
- Faced with foreclosure, an 84-year-old woman living on a small, fixed income came to legal aid for help. Several months earlier, she had been contacted by a contractor who advised her that a government program would pay for repairs to her home. After having her signature paperwork he did not explain, the contractor made costly and unnecessary repairs to her home which resulted in a $32,000 mortgage she was unable to pay. Legal aid negotiated cancellation of the mortgage. The contractor was later prosecuted by the state of Florida.
- Key Area Legal Services

**Income Maintenance Matters:**
- 7,878 Cases (7%)
- A woman’s request for a car to help her move from an apartment to work was denied by the local workforce board. Although cars and other supporting services were available, there was no formal application, review or appeals process. Two legal aid programs co-counseled and appealed the denial to an appellate court. The appeal led to the woman receiving a car and the state adopting a formal application process, and standards of review and denial policies which are in effect in Miami-Dade and Monroe counties for all people seeking assistance as they move from welfare to work.
- Legal Services of Greater Miami

**Legal Aid Advocates Fellowship Program**

Since 1999, the Foundation and its Florida funding partners have provided matching funds for 32 Florida Fellows. Fellows have designed and led legal assistance projects in affordable housing, welfare to work, domestic violence, special education for disabled children, homelessness, immigration, prisoners’ rights, environmental practice, and family preservation. These two-year public interest Fellowships are sponsored by the Washington, D.C.-based Equal Justice Works with funds provided by the Open Society Institute. The Fellows are hosted by Foundation-funded legal assistance organizations to work that was denied by the local workforce board. Although cars and other supporting services were available, there was no formal application, review or appeals process. Two legal aid programs co-counseled and appealed the denial to an appellate court. The appeal led to the woman receiving a car and the state adopting a formal application process, and standards of review and denial policies which are in effect in Miami-Dade and Monroe counties for all people seeking assistance as they move from welfare to work.

In addition to addressing the civil legal needs of the poor in Florida, the Legal Aid Advocates Fellowship program nurtures Florida’s legal assistance community through the enthusiasm of individual Fellows who renew and enliven a host program’s legal advocacy.

In 2002-03, the Foundation approved matching funds for six Fellows in the Class of 2003-05 and was joined by funding partners Dean, Mead, Eggert, Bloodworth, Capuano & Bozarth, P.A., GrayRobinson, P.A., Hill, Ward & Henderson, P.A., Mellon United National Bank, Rogers Greenberg Foundation and Bruce S. Rogers.

The Foundation set several goals for its Children’s Legal Services grant initiative, but emphasizes access to special education and health care services required under law. Another goal is to create and energize a statewide network of children’s legal service providers. The network also can provide support to the thousands of Florida attorneys involved in children’s legal services through guardian ad litem and other projects.

In 2002-03, the Foundation gave Children’s Legal Services grants totaling $661,000 to 14 local legal aid and legal services programs.

**Law School Loan Repayment Assistance Program**

After surveying its legal assistance grantees, the Foundation re-established its Loan Repayment Assistance Program in 2002-03 to improve recruitment and retention of staff legal aid attorneys. The survey showed that a significant number of newly hired attorneys were leaving public service after just three years because of high student loan debt. The Foundation’s Loan Repayment Assistance Program pays the legal aid attorneys up to 75% of the annual payments on their need-based law school debt for up to five years. Annually payments are caped at $6,000 and are in the form of one-year loans forgiven annually for attorneys who remain employed full-time at a Foundation legal assistance grantee for the full 12-month period. In 2002-03, the Foundation committed $189,171 to the Program for benefits to 49 staff legal aid attorneys. In selecting participants, the Foundation gave first priority to former Florida Legal Aid Advocates Fellows and second priority to attorneys in their second and third year of legal aid employment.

**The Florida Bar Foundation Legal Aid Advocates Fellowships Class of 2003-2005**

- **University of Miami Children’s and Youth Law Clinic**
  - Fellow: Tattoon Wiker
  - Project Name: Legal advocacy and outreach to older foster youth

- **Florida Institutional Legal Services**
  - Fellow: Kristen Coskey
  - Project Name: Legal advocacy for civilly committed sex offenders requiring mental health treatment and adequate living conditions

- **Legal Aid Society of Palm Beach County**
  - Fellow: Tim Stevens
  - Project Name: Legal advocacy and outreach to low-income grandparent caregivers

- **Florida Legal Services**
  - Fellow: Monica Ramirez
  - Project Name: Legal advocacy and outreach to female farmworkers who are victims of sexual harassment and gender discrimination

- **Florida Immigrant Advocacy Center**
  - Fellow: Sabrina Salomon
  - Project Name: Representation of low-income Haitian immigrant women and children who are victims of domestic violence

- **Three Rivers Legal Services**
  - Fellow: Rodger Mamerto Calabro
  - Project Name: Development of a comprehensive model for delivery of legal services and education about legal rights in rural North Florida

**Checking Off for Justice – Lawyers’ Challenge for Children**

As you complete your Annual Bar Fee Statement next spring, please consider contributing to the Foundation’s Children’s Legal Services Grant Program through the Lawyer’s Challenge for Children. Just add your gift to your Bar Fee Statement total. Your support will help remove legal barriers to a productive future for thousands of low income children in Florida.

**Florida Legal Services**
- Children First
- Central Florida Legal Services
- Legal Services for Children with Special Needs
- Florida Immigration Advocate Center
- Unaccompanied Minor’s Project
- Florida Legal Services
- Children’s Impact Advocacy and Clearinghouse for State Support
- Florida State University College of Law
- Children’s Advocacy Center
- Lawyers for Children America
- Teen Legal Project
- Legal Aid Service of Broward County
- Education Legal Rights
- Legal Aid Society of Orange County Bar Association
- Legal Services for Foster Children with Special Education Needs
- Legal Aid Society of Palm Beach County
- Educational Advocacy
- Legal Services Greater Miami
- Special Education Advocacy Project
- Legal Services of North Florida
- Teen Law Institute
- Southern Legal Counsel
- Special Education Advocacy Project
- University of Miami School of Law
- Children Law Clinic
- Children First
- Little People of America
- Children’s Advocacy Project

**Total:** $661,000.00
Foundation Law Student Assistance Grant Programs promote the concept of public service and provide financial assistance to eligible students at Florida’s accredited law schools.

Public Service Fellows Program

Program Goals
- To promote pro bono legal services by members of the legal profession;
- To provide law students with direct involvement in public service legal assistance activities; and
- To promote the concept of public service legal work on law school campuses.

Public Service Fellows 2002-2003 Grant Awards

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“Public Service Fellows Program

In cooperation with Florida’s fully accredited law schools, the Foundation administers a Summer Fellowship Program for first- and second-year law students at Foundation-funded legal assistance programs in Florida. In 2002-03, $120,500.00 was awarded for Summer 2003 Fellowships. Twenty-one law students were assigned to 18 legal assistance programs in Florida. In 2002-2003 Grant Awards

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Comments of 2003 Summer Fellows

“I enjoyed researching “real” issues. It was motivating to think that the consequence of my performance was not merely a good or bad grade; rather it could impact a client’s outcome.”

“I came to have a deeper understanding of the critical role attorneys play in their clients’ lives. Whether it was a housing, special education or health care issue, it was sobering to realize that the clients have a strong dependence on the attorneys who are working on their behalf.”

“My fellowship experience last year caused me to forego traditional on-campus interviewing for a chance to return to my program this summer. It further encouraged me to apply for a [Foundation] public service fellowship which I received.”

“Along with the Foundation’s support of Legal Aid Advocates Fellows and Loan Repayment Assistance, this program helps invigorate our legal services community with new, energetic and committed advocates.”

“During our Fellow’s tenure, he made significant contributions to our Senior Unit. His excellent research skills enabled our staff to process and review cases in a very efficient and productive manner.”

Comments of 2003 Host Legal Aid Programs

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Thanks, we couldn't do it without you

Also making a difference are the attorneys, law firms, and others who contributed to our successes in 2002-03 through pro bono services to the Foundation itself:

- Christine Barney, RBB Public Relations, Coral Gables
- William O.E. Henry, Orlando, and Jeffrey S. Levin, New York, Holland & Knight, LLP
- David R. Punzak, Carlton Fields, P.A., St. Petersburg
- Donald C. Works, III, Jackson, Lewis, et al, Orlando

The “Bringing Home the Bacon” piggy bank was presented to Foundation Director William H. Davis at the Foundation’s annual dinner in June for his outstanding work on the Tallahassee Fellows Recruitment Campaign.
Improvement in the operation and management of the court system; Programmes with demonstration value or replication potential; and Improvement and reform of the criminal, civil, and juvenile justice systems; Requests for matching funds.

Public education and understanding about the law, including law-related education; and Promotion and support for public interest legal representation.

Preference generally will be given to:

Grantmaking Philosophy
A goal of the Florida Bar Foundation is to focus grants in areas where the funding can have a measurable impact. Toward that end, the Foundation concentrates grants for improvements in the administration of justice in four areas, with emphasis on how the courts can operate more effectively and expeditiously.

Areas of Funding
- Improvement in the operation and management of the court system;
- Improvement and reform of the criminal, civil, and juvenile justice systems;
- Public education and understanding about the law, including law-related education; and
- Promotion and support for public interest legal representation.

The Foundation occasionally considers and seeks out projects in other subject areas related to improving the administration of justice in Florida.

Funding Criteria
Preference generally will be given to:
- Applicants seeking start-up funds or seed money over a one or two-year period;
- Programs with demonstration value or replication potential; and
- Requests for matching funds.

AOJ typically does not fund direct service programs (e.g. drug treatment or counseling), replicas of established programs, local community groups, programs for which there is governmental responsibility to provide funding, and does not provide continuing program support.

This award was established by The Florida Bar Foundation board of directors to honor the memory of Steven M. Goldstein, Goldstein, a former legal services attorney and professor at Florida State University College of Law, was a tireless advocate of the legal rights of the poor and disadvantaged and was respected nationally for his dedication to upholding the constitutional rights of those with unpopular causes. At the time of his death in 1994, Goldstein had just been elected secretary/treasurer of the Foundation and had, for many years, served as the touchstone by which the Foundation measured the significance of its mission and its progress.

First Place
Florida Legal Services
$35,000.00

Second Runner-Up
Lee County Clerk of Court
$66,000.00

Third Runner-Up
Lee County Pay-or-Appear Program
$15,000.00

Total
$449,586.00

Steven M. Goldstein Award for Excellence

This project challenged and reformed the standards by which the State of Florida limited and terminated the rights of older foster children to benefits which helped them to successfully transition from foster care to adulthood.

Second Runner-Up
Central Florida Legal Services
Daytona Beach Housing Authority Project
$69,000.00

This project protected and advanced the rights of low income tenants in public housing to ensure that tenants receive benefits to which they are legally entitled and are not charged with unauthorized fees.
In 1991, the Foundation established an Endowment as a permanent source of support for the Fellows’ charitable activities. Initial funding for the Endowment came from $1 million in unrestricted IOTA investment earnings, the income from which exclusively will fund IOTA grants. The Endowment funding came from $112,062 in Fellows’ pledge payments and other contributions increasing total Endowment net assets to $2,955,007.

The Foundation’s Fellows Program is an excellent venue for attorney participation in the charitable objectives of the Foundation.
Fellows Program & Endowment Trust

Tallahassee Fellows Campaign Committee

Thanks to the following volunteers for their work recruiting new Fellows in Tallahassee in the spring of 2013.

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Charles E. White
Philip Bruce Culpepper
W. Dexter Douglass
Davison F. Dunlap
Stephen C. Emmanuel
Robert M. Ervin
John F. Harkness, Jr.
Kenneth R. Lawrence
Kelly Overstreet Johnson
M. Catherine Lannom
James Elliott Messer
Harry Lewis Michaels
Philip E. Parker
Derek McCann
Gary Maguire
Carolyn Mayo
Frederick E. Hart
Robert M. Rhodes
Joseph J. Ward
Kenneth E. Walton II
Nancy Weber
Robert Wayne

Other Contributors

Children's Legal Services Grant Program
Centenarian Lawyer Fund
Legal Services Summer Fellowship Program
Legal Aid Advocates Fellowship Program
Fellows and friends at the Law Day Celebration following the Tallahassee Fellows Campaign.

Memorial Gifts

The Foundation strives to present a complete and current list of donors. If a mistake has been made in your list, I sincerely apologize and ask that you contact us so that we may correct our records.

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Fellows and friends at the Law Day Celebration following the Tallahassee Fellows Campaign.

Memorial Gifts

The Foundation strives to present a complete and current list of donors. If a mistake has been made in your list, I sincerely apologize and ask that you contact us so that we may correct our records.
Making a Difference

I think that there are at least three reasons organizations succeed. Great volunteers. Great staff. And a great partnership between the two. The Florida Bar Foundation has all three. In his President’s Message, Bill Thompson celebrates the generous contributions of time, talent and energy of the Foundation’s volunteer leadership. Now, I’d like to boast a bit about the Foundation’s staff and describe just a little about their individual contributions to the Foundation’s success.

In 2002-03, there were 13 Foundation staff members, five of whom have been at the Foundation for more than ten years, and two for more than 15 years. The names of many staff are familiar...