



ANDREW M. O'MALLEY  
*President  
The Florida Bar Foundation  
2003-04*

## The President's Message

Thanks to the efforts of the dedicated board members and staff of the Foundation, more than \$11.55 million in grants was awarded in 2003-04. I have been honored to work with some of the finest people I have ever known. From the tireless, inspirational lawyers and non-lawyers

who take time out of their busy lives to spearhead committee meetings and fundraising drives, to the growing list of Foundation Fellows who share our vision of providing greater access to justice, I am deeply touched and humbled by their commitment.

These people may not see how their efforts continue to reach into the darkest corners of The Sunshine State. The chief beneficiary of our grantmaking is civil legal assistance organizations operating in all 67 Florida counties. A special thank-you is needed for those who donate time to the legal aid programs throughout the state. To encourage bright young lawyers to consider a career as a legal aid attorney, the Foundation also offers, on a limited basis, law school loan repayment assistance. Through such innovations, the Foundation is working to help make the promise of equal access to justice a reality in Florida.

Gifts from lawyers through the Lawyers' Challenge for Children on the annual Florida Bar Fee Statement and from other donors have increased the Foundation's funding for 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. Miles McGrane deserves much of the credit for helping increase funding for children's legal services. McGrane, a great humanitarian as well as an exemplary human being, has spent much of his life championing children's causes. I am honored to serve with him, and to count him as my friend.

Again this year, the Foundation administered funds through the Florida Access to Civil Legal Assistance Act. One million dollars in state-appropriated funds continued pilot projects in seven judicial circuits. Although substantially less funding was provided, dedicated attorneys continued to tirelessly serve thousands of needy clients. Last year, 4,648 cases were closed, with an additional 8,880 clients receiving education about their legal rights.

Another area of Foundation grantmaking supports projects to improve the administration of justice in Florida. This is a small grant program, but it is often the only source of funds for local courts, bar associations and other groups to test ways to make the

number of my clients will sleep in a bed with a roof over their heads tonight instead of on the street." 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, I am gratified to see law students who understand the responsibility lawyers have to their community.

Also this year, we are pleased to have worked closely with the Florida Bankers' Association to increase IOTA revenue. The FBA supported changes to the IOTA rule in 2001 to increase revenue. Again this year, we thank FBA's leadership for their cooperation with the Foundation's further efforts to

*... the Foundation is working to help make the promise of equal access to justice a reality in Florida.*

justice system more responsive. Because this discretionary grant program generally is limited to demonstration projects or seed money, it's been called one of the few sources of venture capital for the justice system. Last year, for example, \$181,900 was awarded to the Florida Law Related Education Association to provide general support of resources for a statewide law-related education program to impact students, teachers, judges, attorneys and policymakers. Funding was also given to provide partial support for a workshop sponsored by The Florida Bar for journalists who cover the courts and legal issues.

We also use our funds to promote the concept of public service by law students through the Legal Services Summer Fellowship and Public Service Fellows programs. Both programs are highly competitive, and attract the brightest of today's young legal minds. The Foundation's Summer Fellows rated their experience "outstanding" or "very satisfactory," and one Fellow said the most satisfying aspect of his fellowship was "knowing that a

increase the amount of funds generated by IOTA for legal aid and the other charitable programs IOTA makes possible.

Of course, lower interest rates have made our fundraising efforts more critical to maintaining stability in Foundation grants. Thanks to the efforts of the development committee, we had very successful recruiting campaigns for Foundation Fellows in Miami-Dade County and the Sixth Judicial Circuit, adding 406 new pledges. Consider, for a moment, that the price of becoming a Foundation Fellow is less per day than a cup of designer coffee. 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.

ANDREW M. O'MALLEY  
*President, 2003-04*

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### The Florida Bar Foundation Mission Statement

The mission of The Florida Bar Foundation, a philanthropic organization established in 1956 by Florida lawyers and the Supreme Court of Florida, is to provide greater access to justice. The Foundation will accomplish its mission primarily through funding of programs which:

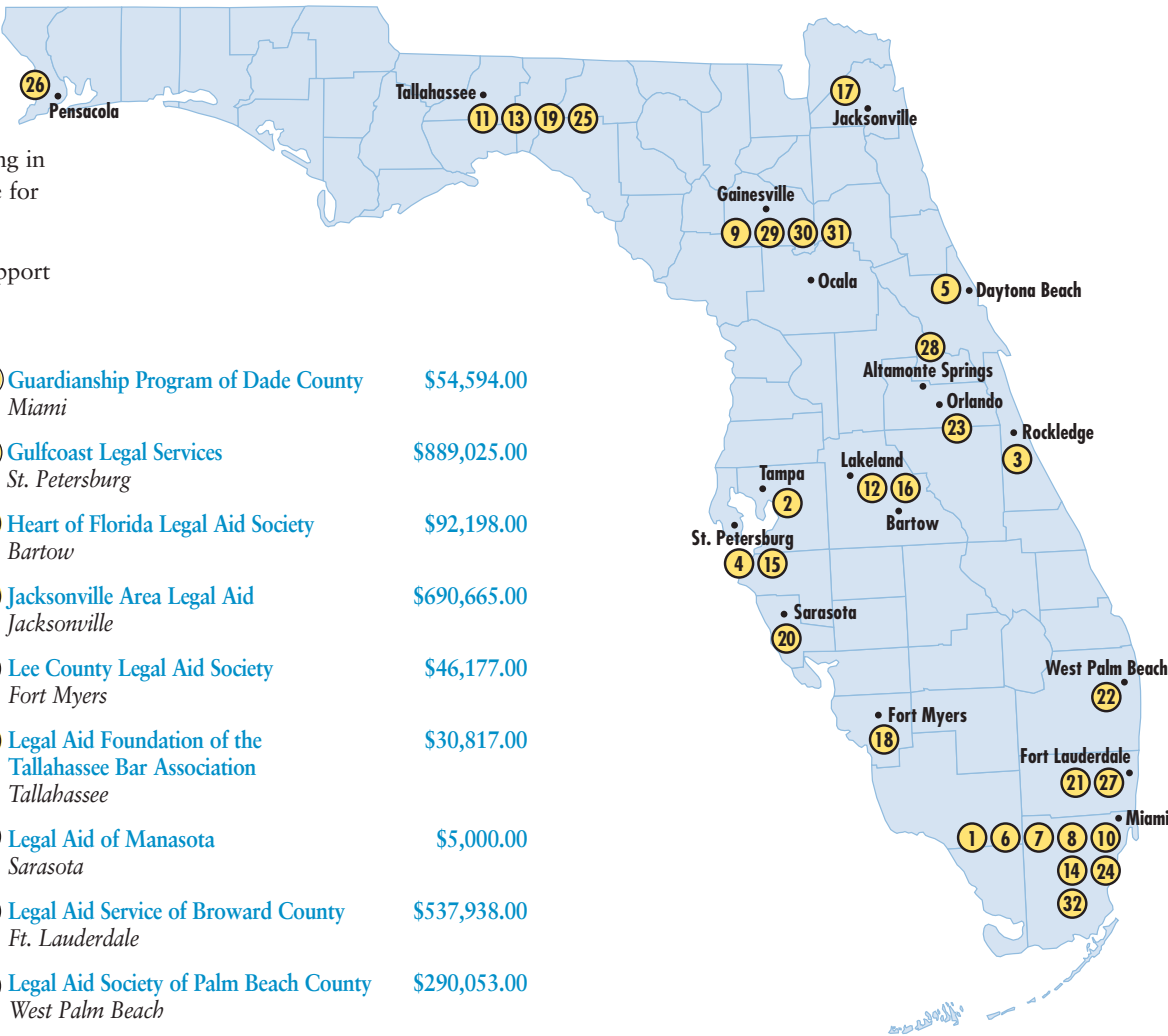
- Expand and improve representation and advocacy on behalf of low-income persons in civil legal matters;
- Improve the fair and effective administration of justice; and
- Promote service to the public by members of the legal profession by making public service an integral component of the law school experience.

# Grants for Legal Assistance for the Poor

*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 2003-04, the Foundation awarded 32 grants in support of legal aid organizations serving every Florida County:

1 American Friends Service Committee Central American Political Asylum Program Miami	\$106,422.00	14 Guardianship Program of Dade County Miami	\$54,594.00		
2 Bay Area Legal Services Tampa	\$164,144.00	15 Gulfcoast Legal Services St. Petersburg	\$889,025.00		
3 Brevard County Legal Aid Rockledge	\$69,383.00	16 Heart of Florida Legal Aid Society Bartow	\$92,198.00		
4 Community Law Program St. Petersburg	\$5,000.00	17 Jacksonville Area Legal Aid Jacksonville	\$690,665.00		
5 Community Legal Services of Mid-Florida Daytona	\$815,842.00	18 Lee County Legal Aid Society Fort Myers	\$46,177.00		
6 Cuban American Bar Association Pro Bono Project (Administered by Florida Immigrant Advocacy Center) Miami	\$27,297.00	19 Legal Aid Foundation of the Tallahassee Bar Association Tallahassee	\$30,817.00		
7 Dade County Bar Association Office of Public Service-Volunteer Lawyers Miami	\$296,626.00	20 Legal Aid of Manasota Sarasota	\$5,000.00		
8 Florida Immigrant Advocacy Center Miami	\$585,078.00	21 Legal Aid Service of Broward County Ft. Lauderdale	\$537,938.00		
9 Florida Institutional Legal Services Civil Legal Assistance Project Gainesville	\$357,126.00	22 Legal Aid Society of Palm Beach County West Palm Beach	\$290,053.00		
10 Florida Justice Institute Miami	\$223,231.00	23 Legal Aid Society of the Orange County Bar Association Orlando	\$381,722.00		
11 Florida Legal Services Tallahassee	\$1,501,947.00	24 Legal Services of Greater Miami Miami	\$533,803.00		
Florida Legal Services Migrant Farmworker Justice Project Tallahassee	\$491,713.00	25 Legal Services of North Florida Tallahassee	\$406,015.00		
Florida Legal Services Resource Development Project Tallahassee	\$80,000.00	26 Northwest Florida Legal Services Pensacola	\$209,813.00		
12 Florida Rural Legal Services Lakeland	\$580,854.00	27 Nova Southeastern University/Shepard Broad Law Center Ft. Lauderdale	\$2,500.00		
13 Florida State University College of Law Pro Bono Project Tallahassee	\$2,500.00	28 Seminole County Bar Association Legal Aid Society Altamonte Springs	\$52,076.00		
		29 Southern Legal Counsel Gainesville	\$192,324.00		
				30 Three Rivers Legal Services Gainesville	\$50,000.00
				31 University of Florida College of Law Virgil Hawkins Civil Clinic Gainesville	\$2,500.00
				32 University of Miami School of Law Children and Youth Law Clinic Miami	\$2,500.00
				<b>Total</b>	<b>\$9,776,883.00</b>



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



**P**ro bono hours donated by members of The Florida Bar through organized pro bono programs in 2003 represented 16% of all cases — almost 16,000 — 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

And, not all pro bono work has to involve direct representation of clients. For example:

- Providing substantive law and skills training to legal aid attorneys
- 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: 37,118 Cases (37%)

After her husband sexually molested their 3-year-old daughter, “Rachel” sought assistance from legal aid. The 29-year-old mother of three was able to obtain an injunction for protection against domestic violence and a divorce. Because of legal aid attorneys’ efforts, Rachel was awarded sole custody, child support, ownership of the marital home, vehicle, and furnishings. The husband was denied any visitation or contact with the couple’s minor children.

*Heart of Florida Legal Aid Society*

## Housing Matters: 17,007 Cases (17%)

“Lois,” an 87-year-old widow, was faced with foreclosure of her home. She had already been evicted, and had no place to live. A legal aid attorney successfully fought Lois’s foreclosure. Lois was then able to get her home refinanced and renovated through two government programs. Lois is now back home.

*Community Law Program*

## Individual Rights Matters: 14,735 Cases (15%)

“Jorge” spent 23 years in the U.S. waiting to be granted permanent residence status. The 55-year-old Guatemalan fled to this country in 1980 after enduring death threats by guerrilla forces. After filing for

asylum in 1980, Jorge worked, married and raised a family. Still, always in his mind, was his desire to become a permanent resident. Legal aid attorneys worked with the courts, and in 1983, Jorge got his wish.

*American Friends Service Committee*

## Consumer Matters: 8,923 Cases (9%)

“Janet” requested and received authorization for surgery from her employer’s insurance company. After she had the procedure done, Janet was terminated from her job. The insurance company then refused to pay her medical bills. A pro bono attorney filed a suit on Janet’s behalf against the insurance company. Because of the attorney’s efforts, the bills, totaling \$30,000, were paid in full.

*Legal Aid of Manasota*

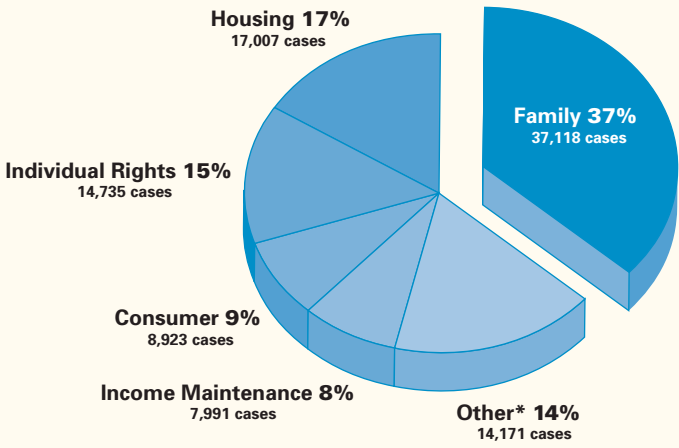
## Income Maintenance Matters: 7,991 Cases (8%)

“Carlos,” a permanent resident of the United States, attended a legal aid clinic in his community. There, he discovered he could claim Earned Income Tax Credit for his three children. Staffers told Carlos he could also retroactively claim the credit for the past three years. Legal services helped Carlos amend his previous tax returns, resulting in and additional refund of \$7,453.

*Central Florida Legal Services*

## TOTAL: 99,945 Cases

Percentage of Cases Handled in 2003



*\*Includes employment, health, children, education, etc.*

## 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. Annual payments are capped 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 2003-04, the Foundation committed \$233,163 to the Program for benefits to 55 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.

## Legal Aid Advocates Fellowship Program

Since 1999, the Foundation and its Florida funding partners have provided matching funds for 38 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, prisoner 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.

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

In 2003-04, the Foundation approved matching funds for six Fellows in the Class of 2004-06 and was joined by funding partners GrayRobinson, P.A., Greenberg Traurig and The Florida Bar.

### The Florida Bar Foundation Legal Aid Advocates Fellowships Class of 2004 - 2006

Host Legal Aid Program	Fellow	Project Name
Jacksonville Area Legal Aid	Jenna Lopes	<b>Prisoner Project</b> — Provide pre- and post-release advocacy to prisoners through direct legal services, referrals, self-help and policy advocacy
Florida Immigrant Advocacy Center	Jessica Zagier	<b>Immigration Project</b> — Create an education, legal services and advocacy program serving unrepresented, detained immigrants in western central Florida
Southern Legal Counsel	Shelbi Day	<b>Homeless Persons Project</b> — Provide legal advocacy, public education and policy advocacy to protect the human and civil rights of homeless persons
The Legal Aid Society of Palm Beach County, Inc.	Josephine Vacciana	<b>Domestic Abuse of Non-citizens Project</b> — Provide legal advocacy and outreach to non-citizen victims of domestic abuse in Palm Beach and Martin Counties, Florida
Bay Area Legal Services	Robert Jacobs	<b>Special Education Project</b> — Provide legal advocacy on educational issues for delinquent and dependent children
Legal Aid Society of the Orange County Bar Association, Inc.	Matthew Brinegar	<b>Elder Advocacy Project</b> — Provide legal and legislative advocacy for low-income seniors with health care access problems in Orange County, Florida

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

As you complete your Annual Florida Bar Fee Statement next spring, please consider contributing to the Foundation’s Children’s Legal Services Grant Program through the Lawyers’ 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.



## Children’s Legal Services

Since 1999, The Florida Bar Foundation has funded special annual grants for legal assistance to children. Starting in 2000-01, gifts from attorneys to the Foundation from the Lawyers’ Challenge for Children on the annual Florida Bar Fee Statement and from other sources also support these grants.

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 services 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 2003-04, the Foundation gave Children’s Legal Services grants totaling \$688,395 to 17 local legal aid and legal services programs.

Barry University School of Law Children’s First Collaborative	Orlando	\$29,830.00
Bay Area Legal Services, Inc. Pro Bono Kinship Care Project	Tampa	\$1,000.00
Community Legal Services of Mid-Florida Special Education Advocacy Project	Daytona	\$47,000.00
Dade County Bar Association Office of Public Service Teen Legal Collaborative (Joint project with Lawyers for Children America)	Miami	\$17,500.00
Florida Immigrant Advocacy Center Unaccompanied Minors Project	Miami	\$15,000.00
Florida Legal Services Children’s Education and Health Collaborative Advocacy & Policy Project	Tallahassee	\$65,395.00
Florida’s Children First! Children’s First Collaborative (Joint project with Barry University School of Law & University of Miami School of Law)	Orlando	\$66,050.00
Florida State University College of Law Children’s Advocacy Center Special Education/Health Care Access Project	Tallahassee	\$55,000.00
Lawyers for Children America Teen Legal Collaborative (Joint project with Dade County Bar Association Legal Aid)	Miami	\$32,500.00
Legal Aid Service of Broward County Education Legal Rights	Ft. Lauderdale	\$25,000.00
Legal Aid Society of the Orange County Bar Association Guardian Ad Litem Project	Orlando	\$35,000.00
Legal Aid Society of Palm Beach County Educational Advocacy Project	West Palm Beach	\$25,000.00
Legal Services of Greater Miami Special Education Advocacy Project	Miami	\$25,000.00
Legal Services of North Florida Education Equals Progress Project	Tallahassee	\$15,000.00
Southern Legal Counsel Special Education Advocacy Project	Gainesville	\$100,000.00
Three Rivers Legal Services Special Education Project	Gainesville	\$25,000.00
University of Miami School of Law Children’s First Collaborative (Joint project with Florida’s Children First! & Barry University School of Law)	Miami	\$109,120.00

**Total**

**\$688,395.00**

# Law Student Assistance Grants

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 generally.

## Public Service Fellows 2003-2004 Grant Awards

Approximately 40 students participated in the 2003-04 IOTA Public Service Fellows Program and contributed an estimated 8,000 hours of direct public service. Students work at legal aid offices, guardian ad litem programs, public defender offices, state attorney offices and other public service agencies.

Florida State University College of Law Tallahassee	\$13,800.00
Nova Southeastern University/Shepard Broad Law Center Fort Lauderdale	\$13,800.00

St. Thomas University School of Law Miami	\$13,700.00
Stetson University College of Law St. Petersburg	\$13,800.00
University of Florida Levin College of Law Gainesville	\$14,900.00
University of Miami School of Law Coral Gables	\$20,000.00

<b>TOTAL</b>	<b>\$90,000.00</b>
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Law students hand-picked for The Florida Bar Foundation's Legal Services Summer Fellowship Program enjoy their orientation before they begin their internships. The highly competitive program provides both an invaluable learning experience for the students and support to the state's legal services community.

## Legal Services Summer Fellowship 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.

The Foundation awarded \$90,000 to continue the legal services fellowship program for the summer of 2004. Eighteen law students were assigned to 15 legal assistance programs for 11-week internships from May to August 2004. Partnering with the Foundation was the Florida Lawyers Legal Insurance Corporation (FLLIC) and the Florida Legal Services Project Director’s Association.

Mistelle Abdelmagied	Legal Services of Greater Miami
Aziza Naa-Kaa Botchway*	Florida Legal Services — Miami
Valerie M. Dew	Legal Aid Service of Broward County
Tammi Driver	Legal Aid Society of the Orange County Bar
Collette Duke	Community Law Program
Edith L. Escalona**	Legal Services of North Florida
Callan Garcia*	Florida Immigrant Advocacy Center
Shannon Tingwall Kelly	Seminole County Bar Association Legal Aid
Zulema Fayette Laurent	Florida Rural Legal Services
Joshua LeRoy	Legal Aid of Palm Beach County
Michelle J. Leyva	Gulfcoast Legal Services
Marisa M. Lopez	Florida Institutional Legal Services
Jill A. Mahler	Jacksonville Area Legal Aid
Sharon Nowell	Legal Services of Greater Miami
Alejandro T. Reyes	Gulfcoast Legal Services
Sarah Wallerstein	Southern Legal Counsel
Maegan Y. Young	Dade County Bar Association Legal Aid

\*Selected recipients of Florida Lawyers Legal Insurance Corporation (FLLIC) sponsorship.  
\*\*Selected recipient of the Terry Russell Fellowship funded by the Project Director’s Association.

*“Although the work was emotionally demanding, I went home with a sense of peace that can only come from contributing to something bigger.”*

*“This experience allowed me to grow as a person and as a law student. The environment encouraged me to question the law and challenged me to find the most appropriate solutions.”*

*“It has solidified my decision to practice public interest law after graduation.”*

*“My commitment to legal service/public interest work was already strong, but this experience allows me to point to a history of commitment as I search for a permanent position.”*

Comments of 2004 Summer Fellows

*“The program has been and continues to be a major benefit to our program and our clients. Once again this year, we had an excellent Fellow with a combination of academic skills and dedication to public interest. In our small office, such a person makes a great contribution permitting us to accomplish more for our clients.”*

*“These may have been our best Summer Fellows since the program began.”*

*“Our student was very bright and was always willing to handle a variety of assignments. Her research and writing were outstanding, as were her interviewing skills. She was interested in all aspects of our work and enthusiastically worked a wide range of cases and issues.”*

*“This was our student’s second summer with our office. Both summers he worked with our Juvenile Advocacy Project and did an excellent job. He is an outstanding researcher and writer, and worked on a number of appellate briefs during his tenure.”*

Comments of 2004 Host Legal Aid Programs



Foundation Director John W. Thornton, Jr. received the “Bringing Home the Bacon” piggy bank at the Foundation’s annual dinner in June for his outstanding work on the Miami Fellows Recruitment Campaign. John A. Yanchunis will be honored for the success of the Sixth Circuit Fellows Campaign at the Foundation board of directors meeting in December 2004.

## 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 2003-04 through pro bono services and in-kind support to the Foundation itself:

- Matthew D. Allen, Marty J. Solomon and Nicole Deese  
Carlton Fields, Tampa
- William O.E. Henry and Scott R. MacLeod  
Holland & Knight, LLP, Orlando
- The Bankers Club, Miami
- Donald C. Works, III  
Jackson, Lewis, et al, Orlando



# Medal of Honor Awards

The Florida Bar Foundation Medal of Honor Award Program was established in 1977 to recognize outstanding achievements in improving the administration of justice in Florida. Two categories of award recipients have been designated.

The first is for a member of The Florida Bar who has demonstrated his or her dedication to the objectives of the Bar as set out in the Rules Regulating The Florida Bar:

*“...to inculcate in its members the principles of duty and service to the public, to improve the administration of justice, and to advance the science of jurisprudence.”*

The second is given to a non-lawyer or person not actively engaged in the practice of law who has made an outstanding contribution to the improvement in the administration of justice through research, writing, or other deeds of such character and quality that, in the judgment of the Foundation, warrant the highest award that can be bestowed by the Foundation.

**Excerpt from Medal of Honor Citation for William Sheppard**  
*“He remains a fervent believer in the force of law to act as a shield for the weak or oppressed when standing before the powerful.”*



William J. "Bill" Sheppard and Rosalie Heffernan, recipients of The Florida Bar Foundation's Medal of Honor Award for 2004, stand next to Bill Loucks, president of Florida Lawyers Mutual Insurance Co.

The 2004 Medal of Honor for a lawyer was presented to William J. “Bill” Sheppard, for his selfless devotion as a champion of the legal rights of the poor and unpopular.

In his more than 36 years as a criminal defense and civil rights lawyer, Sheppard has upheld the fundamental precepts of our criminal and civil justice systems.

We are grateful to Bill Sheppard for standing in our stead in his faithful pursuit of justice without which we cannot long survive as a free society.

**Excerpt from Medal of Honor Citation for Rosalie Heffernan**  
*“Rosalie Heffernan has had an immense impact on the lives of her students, imbuing in them her own passion for the wonders of America.”*

Rosalie Heffernan received the Medal of Honor for a non-lawyer for her efforts in giving meaning and substance to the U.S. Constitution. Heffernan, a teacher at Our Lady of Lourdes Academy in Miami, started an after-school program called “Constitutional Studies.” For the past 12 years, Heffernan has attracted many young women, primarily daughters of Cuban exiles, and taught them the founding principles of our country.

Heffernan calls the program her field of dreams. She built it, and they came.

Students from Heffernan’s after-school program have competed in “We The People,” a national competition designed to test high school students on their knowledge of the U.S. Constitution. So far, Heffernan’s teams have won the national championship three times.

Not content to solely promote the ideals of democracy in her own country, Heffernan has also worked in Hungary, Russia and Latvia, sharing with teachers her faith in the power of constitutional freedoms and declaring their role and responsibility to engender such faith among their own peoples.

## Improvements in the Administration of Justice Grant Program

### 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 five 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;
- Promotion and support for public interest legal representation; and
- Promotion and support for voluntary bar association sponsored community-service initiatives to improve the operation of the civil or criminal justice systems and for education, outreach or service-delivery projects, which enhance the administration of justice in Florida.

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 a governmental responsibility to provide funding, and does not provide continuing program support.

### Improvement in the operation and management of the court system 2003-04 Grant Awards

Office of the State Courts Administrator Tallahassee Florida Supreme Court Committee on Privacy and Court Records	\$12,500.00
Office of the State Courts Administrator Tallahassee Florida Court Public Information Officer Training	\$40,700.00

### Public education and understanding about the law, including law-related education

Florida Law Related Education Association Tallahassee Perceptions in Justice: Advancing Law-Related Education in Florida	\$181,900.00
Florida Law Related Education Association Tallahassee Florida Justice Teaching Institute	\$25,000.00
The Florida Bar Tallahassee Reporting on the Courts and the Law: A Workshop for Journalists	\$5,700.00
The Florida Supreme Court Historical Society Tallahassee General support of the Florida Supreme Court Historical Society	\$35,000.00

**Total** **\$300,800.00**

## 2003-04 Voluntary Bar Association Community Service Grant Program

The *Voluntary Bar Association Community Service Grant Program* was established by the Foundation in 2003-04 as an ongoing program of one-time grants up to \$5,000 each (\$50,000 total funds available) awarded to voluntary bar associations in Florida to promote **new** or **significant improvement in existing** charitable, community-service projects. The goals of the Voluntary Bar Association Community Service Grant Program are:

1. To increase community service by Florida’s legal profession through voluntary bar association initiatives; and
2. To serve as a *readily accessible* source of funding for a *full range* of voluntary bar association charitable, community-service projects.

### 2003-04 Voluntary Bar Association Community Service Grant Awards

Broward County Bar Association-Young Lawyers Section Charity Golf Tournament	Ft. Lauderdale	\$5,000.00
Clearwater Bar Association People’s Law School	Clearwater	\$5,000.00
Florida Association for Women Lawyers (Palm Beach County) Breakfast and Books Mentoring Program	West Palm Beach	\$5,000.00

Haitian Lawyers Association Koze Legal Television Show	Miami	\$5,000.00
Hillsborough Association for Women Lawyers Florida Kinship Legal Assistance Summit	Tampa	\$5,000.00
Miami Beach Bar Association Rebecca Towers Monthly Legal Clinic Project	Miami	\$5,000.00
Palm Beach County Bar Association Small Claims Pre-Filing Mediation Program	West Palm Beach	\$5,000.00
Tallahassee Barristers Association Voting and Credit: Legal Rights and Responsibilities Education Campaign	Tallahassee	\$3,000.00
Tallahassee Women Lawyers Legacy of Excellence Law Day Program	Tallahassee	\$1,800.00
Third Circuit Bar Association Drug Court Mentoring Project	Lake City	\$2,500.00
The Bankruptcy Bar Foundation of the Southern District of Florida Bankruptcy Assistance Clinic	Ft. Lauderdale	\$5,000.00

**Total** **\$47,300.00**





# Foundation Annual Dinner



# Fellows Program & Endowment Trust

The Fellows of The Florida Bar Foundation are committed to improving Florida’s legal system and share a common interest in supporting the charitable purposes of the Foundation.

Fellows contribute \$1,000 to become life members of the Foundation. Pledge payments may be extended over a period of five years and are charitable contributions to the Foundation. Young lawyers may opt for a 10-year payment period.

## Director’s Circle\*

J. Wayne Hogan

## Gold Circle\*

John W. Frost  
Stuart Z. Grossman  
William O.E. Henry  
Miles A. McGrane III  
Lou Ann Powell  
Russell Troutman  
Marvin A. Urquhart, Jr.

## Silver Circle\*

Bruce B. Blackwell  
Darryl M. Bloodworth  
A. Hamilton Cooke  
Jane Elizabeth Curran  
Howard M. Neu  
Daryl Parks  
William L. Thompson, Jr.

## Bronze Circle\*

William Aaron  
Anthony J. Abate  
David Abbey  
Adam G. Adams III  
Louie N. Adcock, Jr.  
Marcy Levine Aldrich  
Bonnie Allen  
Herbert L. Allen  
Sandra E. Allen  
John Rollins Allison III  
Jonathan L. Alpert  
Cesar L. Alvarez  
Francisco R. Angones  
Georgina A. Angones  
Justice Harry Lee Anstead  
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\*Current as of 10/08/04



# Fellows Program & Endowment Trust

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The Foundation strives to present a complete and correct list of donors. If a mistake has been made in your listing, we sincerely apologize and ask that you contact Amanda Styles at email: [astyles@flabarfdn.org](mailto:astyles@flabarfdn.org) so we may correct our records.

\*Current as of 10/08/04

## Other Contributors

**Children's Legal Services Grant Program**  
4,421 Attorneys through The Florida Bar Fee Statement  
*Florida Trend*

**Legal Aid Advocates Fellowship Program**  
GrayRobinson, P.A.  
The Florida Bar

**Legal Assistance For The Poor Grant Program**  
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**Legal Services Summer Fellowship Program**  
Florida Lawyers' Legal Insurance Corporation  
Legal Services Project Directors Association  
in honor of Terry Russell

**Medal of Honor Awards**  
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**Samuel S. Smith Endowment Fund of The Florida Bar Foundation Endowment Trust**  
Ruden, McClosky, Smith, Schuster & Russell, P.A.

**Statewide Pro Bono Project Director**  
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George Cauthen, in memory of Chesterfield H. Smith  
Dean, Mead, Egerton, Bloodworth, Capouano & Bozarth, P.A., in honor of Darryl M. Bloodworth  
Valory Greenfield, in honor of Amy and Richard Pollack  
Valory Greenfield, in honor of Gerald B. Wald  
Francine Walker, in memory of Emma Sue Shashy



# Fellows Program & Endowment Trust

## Miami Fellows Campaign Committee

*Thanks to the following volunteers for their work recruiting new Fellows in Miami-Dade County in the fall of 2003.*

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William Aaron  
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Stephen N. Zack



*Miles McGrane, John Thorton and Terry Russell*



*Chantale Suttle and Jennifer Coberly*



*Neal Sonnett, Bob Parks and Randy Berg*

## Sixth Circuit Fellow Campaign Committee

*Thanks to the following volunteers for their work recruiting new Fellows in the Sixth Judicial Circuit in the spring of 2004.*

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*John Yanchunis*

## Investing in Justice



**O**ur mission is to provide greater access to justice. We do that primarily by providing leadership and funding for legal aid in Florida. We also fund projects to improve Florida's justice system, including innovations in court operation, and to instill the spirit of public service in students at Florida law schools.

Foundation funding for civil legal aid supports programs in your community that offer advice and help with legal matters for people with no place else to turn. From helping a single mother collect the child support she deserves, to assisting an elderly person to overturn an unlawful eviction, civil legal aid is

working in your community to help people when their rights are denied.

Although IOTA funds are a significant source of support for the Foundation's mission, we can and need to do more. Working together, we can continue our charitable activities and enhance our mission.

Your charitable contributions to the Foundation can help provide access to justice for the most vulnerable members of society. Gifts can support current programs or can be added to The Florida Bar Foundation Endowment Trust as a permanent source of support for Foundation programs.

Florida lawyers — and the broader public — consistently demonstrate their sense of responsibility to care for those in need, and their belief in the value of fairness in our justice system — the very heart of the Foundation's mission. We invite you to support the work of the Foundation — and make your investment in justice.

To learn more about charitable giving opportunities at the Foundation, please contact:

**Amanda B. Styles**  
Development Coordinator  
Toll free: 800.541.2195  
Email: [astyles@flabarfdn.org](mailto:astyles@flabarfdn.org)

# From the Executive Director

*It would be a shame to the Foundation board members, other volunteers and staff to hide the Foundation's light under a bushel . . .*

## Making a Difference

In his President's Message, Drew O'Malley celebrates the generous contributions of the Foundation's volunteer leadership, that of The Florida Bar to the success of Foundation programs, and support for IOTA from Florida's banking community. Now, I'd like to boast a bit about the Foundation's staff and talk about their contributions.

In 2003-04, there were 13 Foundation staff members, five of whom have worked for the Foundation for more than 10 years, and two for more than 15 years. Paul Doyle provides the vision for the Foundation's legal assistance for the poor and law student assistance grant programs. Lou Ann Powell assures the accuracy and integrity of our financial systems. Deana Walker makes sure the office runs smoothly, makes arrangements for Foundation committee and board meetings,

and makes sure we get our paychecks. LuShawn Phillips and Emily Silva help the lawyers, law firms and financial institutions that are the heart of Florida's IOTA program. Carol Wherry assists the board with its information needs, including the meeting materials on which the board bases its decisions. Amanda Styles, who heads up our fundraising program together with development assistant Sharon Cook, are two of our newer staff members. Rounding out the team of staff members who are key to the Foundation's success are grant coordinators Camille Stawicki and Andrea Kempkens, receptionist Jessica Perez, and staff accountant Judy Godette.

The longevity of the Foundation's staff speaks to the importance of the Foundation's mission of assuring greater access to justice. The Foundation's staff is making a difference, through the quality of their work, their judgments and their consistent, professional efforts.

## Looking Ahead

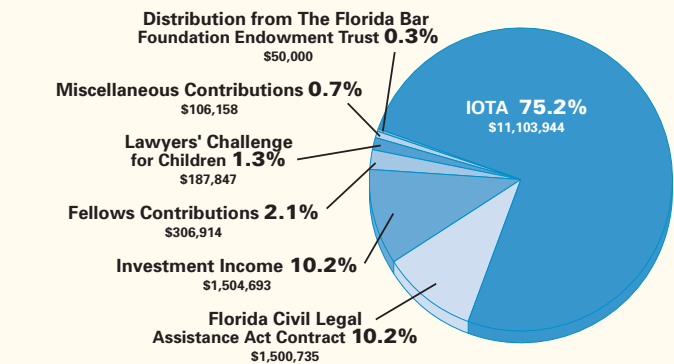
Sales of the Florida *Kids Deserve Justice* specialty license plates will support Foundation grants to address the unique legal needs of children. The entire proceeds from the \$25 plate, which we expect to be available in late 2004 or early 2005, will benefit children's legal services. Passage of the specialty license plate in 2004 was made possible by the creativity, dedication and hard work of then Florida Bar President Miles McGrane and Bar President Kelly Overstreet Johnson during her term as Bar President-Elect. Members of Florida's voluntary bar associations also have enthusiastically pitched in to successfully market the *Kids Deserve Justice* specialty license plate. And if you can't handle giving up your law school alumni plate, go ahead and join the many lawyers who have contributed the \$25 anyway. This will evidence your belief that kids really do deserve justice.



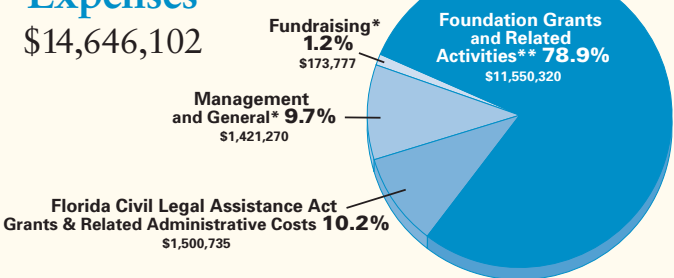
*Jane Elizabeth Curran*  
JANE ELIZABETH CURRAN  
Executive Director

## FINANCIAL INFORMATION

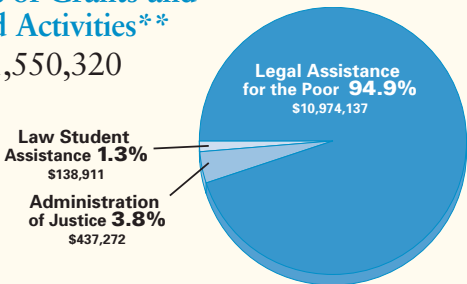
### 2003-04 Revenues \$14,760,291



### 2003-04 Expenses \$14,646,102



### 2003-04 Breakout of Grants and Related Activities\*\* \$11,550,320



\* Administrative expenses represent 10.9% of the Foundation's total activities.

\*\* Foundation grants are based upon the net revenues of the 2002-03 fiscal year. These amounts may differ from the grants in excess of expenses listed elsewhere in this report due to activity on conditional and multi-year grants.

Audited financial statements are available from the Foundation upon request. The Foundation's IRS Form 990 is available on the Foundation's Web site at <http://www.flabarfdn.org>.

## Merrill Lynch Launches First in the Nation IOTA Product

Spring 2004 marked the availability of the first IOTA account product from a brokerage firm. The *Merrill Lynch Working Capital Management Account for IOTA* is available throughout Florida and offers standard bank checking account services and automatic overnight investment of available account balances in a Merrill Lynch government money market fund. The Merrill Lynch WCMA Account for IOTA operates in full compliance with the Rules Regulating The Florida Bar for IOTA.

Florida was the first IOTA program to permit use of brokerage accounts. Because brokerage products hold promise for increasing revenue for legal aid for the poor and IOTA's other charitable programs, bar rules modeled on Florida's now have been adopted in Alabama and are pending in several other states.

For information about the Merrill Lynch IOTA product, contact the Foundation.

### Profile of the IOTA Account Portfolio as of June 2004

Total Number of IOTA Accounts	22,688
Weighted Average IOTA Account Interest Rate	.44%
Total Principal Balance in IOTA Accounts	\$3.62 Billion
Average Balance per Account	\$151,828
Number of Lawyers Participating in IOTA	29,811
Number of Banks Participating in IOTA	293

## GOVERNANCE

The Florida Bar Foundation is a not-for-profit Florida corporation established in 1956 by the Board of Governors of The Florida Bar to foster law-related public interest programs on behalf of Florida's legal profession. Membership is open to all members in good standing of The Florida Bar. Members are eligible to hold office and serve as directors of the Foundation. Participants in Florida's Interest on Trust Accounts ("IOTA") program, administered by the Foundation, are automatically entitled to membership. Membership also is available through annual Foundation dues or through the Foundation's Fellows program. Both annual dues and Fellows contributions are charitable contributions to the Foundation.

The Foundation is governed by a 29-member board of directors which meets quarterly. The board conducts its work through ad hoc and standing committees. The board is comprised of the officers

of the Foundation, six directors by designation (two judicial officers appointed by the Chief Justice of the Florida Supreme Court, the president, president-elect, and immediate past president of The Florida Bar, and the president of Florida Legal Services, which provides coordination, training and other support services to legal aid programs across the state), two public members and 18 at-large directors. At-large directors serve a maximum of two, three-year terms, with one third selected by the board of governors of The Florida Bar, one third by the board of directors of the Foundation, and one third by the Florida Supreme Court.

Committees are appointed annually by the president, and include Foundation directors, members of the bar generally, and the lay public. A nine-member executive committee appointed annually by the board meets between meetings of the board.

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### The Florida Bar Foundation

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