This annual report recounts the Foundation’s work during 2001-02 in awarding grants of more than $11.7 million. The listing of our chief beneficiary of our grantmaking continues to be the poor persons and families served by Florida’s network of civil legal assistance organizations serving all 67 Florida counties. The Foundation, with assistance from Bar members on the annual Bar Fee Statement, also supports 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 put into place to promote their growth into productive adults.

Of course this brief description and listing of our legal assistance grants cannot paint the full picture of the Foundation or the impact of the significant leadership of our volunteers and staff in Florida’s civil legal assistance community. Whether through substantive and financial support of the important effort to make Florida’s system for delivering legal assistance more effective, 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 makes 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.

A second area of Foundation grants 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 in many counties for local courts, bar associations and other groups to test ways to make the justice system more responsive to the people it’s pledged to serve. 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.

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 from those programs is positive both in terms of the organizations served and the growing commitment by law students to use their legal skills to assist the less fortunate.

A disappointment this year was that falling interest rates prevented us from realizing a greater result from the amendments to the IOTA rule passed by the Florida Supreme Court in June 2001. The amendments required parity treatment in rates for IOTA accounts and permitted government money market accounts, in addition to sweep accounts and interest checking accounts, for IOTA funds. Of course, the lower interest rates have made our fundraising efforts even more critical to maintaining stability in Foundation grants. So, when a Foundation director or other volunteer asks you to become a Foundation Fellow or support our mission in other ways, I hope you’ll say yes.

However, an absolutely singular achievement during the year was one in which the Foundation played only a supporting role. But, this project proved that only with big vision and big goals do we achieve great results. Then Florida Bar President Terry Russell set what some may well have called an audacious goal of securing ten million dollars in state funds for civil legal assistance in Florida. It turned out that ten million was out of reach, but Terry’s vision, energy and leadership led to passage of the Florida Access to Civil Legal Assistance Act, the first time the Florida Legislature had appropriated state funds for civil legal assistance. Two million dollars were appropriated for pilot projects in seven judicial circuits. This funding brought the state into partnership with others who have long supported civil legal assistance — most notably the thousands of Florida attorneys who give generously each year of their time and money.

Finally, I am very proud of the fact that each year there are far more Florida Bar members seeking appointment to the Foundation’s board of directors than there are openings to fill. That’s not because of the perks or lavish meeting sites — three times a year we meet at airport hotels for two days and in June at the site of the Bar’s annual meeting, we hold our annual dinner and awards presentations. What drives that interest in working with the Foundation is a commitment to helping people in need, to the belief that people should not be denied access to legal assistance simply because they lack the financial resources and, most important, to a solemn recognition of the truth of Alexander Hamilton’s statement that, “The first duty of society is to justice.”

Darryl M. Bloodworth
President
The Florida Bar Foundation
2001-02

The Florida Bar Foundation Mission Statement

The mission of The Florida Bar Foundation, a philanthropic organization founded 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 the poor in civil legal matters;
- Improve administration of the institutions of justice;
- Provide financial assistance to students for the study of the law; and
- Promote service to the public by members of the legal profession by making public service an integral component of the law school experience.

Darryl M. Bloodworth
President, 2001-02
The Foundation's Legal Assistance for the Poor (LAP) grant program, supported primarily by IOTA funds, provides general support 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 2001-02, the Foundation awarded 39 grants for general support of legal aid organizations serving every Florida County:

<table>
<thead>
<tr>
<th>Grantee</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Friends Service Committee</td>
<td>$112,030.00</td>
</tr>
<tr>
<td>Central American Political Asylum Program</td>
<td></td>
</tr>
<tr>
<td>Miami</td>
<td></td>
</tr>
<tr>
<td>Bay Area Legal Services</td>
<td>$607,162.00</td>
</tr>
<tr>
<td>Tampa</td>
<td></td>
</tr>
<tr>
<td>Breadford County Legal Aid</td>
<td>$72,387.00</td>
</tr>
<tr>
<td>Rockledge</td>
<td></td>
</tr>
<tr>
<td>Central Florida Legal Services</td>
<td>$458,845.00</td>
</tr>
<tr>
<td>Olympos Beach</td>
<td></td>
</tr>
<tr>
<td>Clearwater Bar Foundation</td>
<td>$32,740.00</td>
</tr>
<tr>
<td>Clearwater</td>
<td></td>
</tr>
<tr>
<td>Community Law Program</td>
<td>$42,817.00</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td></td>
</tr>
<tr>
<td>Cuban American Bar Association</td>
<td>$28,479.00</td>
</tr>
<tr>
<td>Pro Bono Project (Administered by Florida Immigrant Advocacy Center) Miami</td>
<td>$28,479.00</td>
</tr>
<tr>
<td>Dade County Bar Association</td>
<td>$233,474.00</td>
</tr>
<tr>
<td>Office of Public Service/Volunteer Lawyers</td>
<td></td>
</tr>
<tr>
<td>Miami</td>
<td></td>
</tr>
<tr>
<td>Florida Immigrant Advocacy Center</td>
<td>$638,035.00</td>
</tr>
<tr>
<td>Miami</td>
<td></td>
</tr>
<tr>
<td>Florida Institutional Legal Services</td>
<td>$217,126.00</td>
</tr>
<tr>
<td>Civil Legal Assistance Project</td>
<td></td>
</tr>
<tr>
<td>Gainesville</td>
<td></td>
</tr>
<tr>
<td>Florida Justice Institute</td>
<td>$322,343.00</td>
</tr>
<tr>
<td>Miami</td>
<td></td>
</tr>
<tr>
<td>Florida Legal Services</td>
<td>$1,561,737.00</td>
</tr>
<tr>
<td>Tallahassee</td>
<td></td>
</tr>
<tr>
<td>Florida Rural Legal Services</td>
<td>$673,859.00</td>
</tr>
<tr>
<td>Lakeland</td>
<td></td>
</tr>
<tr>
<td>Florida State University College of Law</td>
<td>$5,000.00</td>
</tr>
<tr>
<td>Pro Bono Project</td>
<td></td>
</tr>
<tr>
<td>Tallahassee</td>
<td></td>
</tr>
<tr>
<td>Greater Orlando Area Legal Services</td>
<td>$212,098.00</td>
</tr>
<tr>
<td>Orlando</td>
<td></td>
</tr>
<tr>
<td>Guardianship Program of Dade County</td>
<td>$56,958.00</td>
</tr>
<tr>
<td>Miami</td>
<td></td>
</tr>
</tbody>
</table>

LAP grants also support legal assistance for specific client services and to serve specific client groups.

In fiscal year 2001-02, the Foundation awarded 39 grants for general support of legal aid organizations serving every Florida County:

<table>
<thead>
<tr>
<th>Grantee</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida Immigrant Advocacy Center</td>
<td>$638,035.00</td>
</tr>
<tr>
<td>Miami</td>
<td></td>
</tr>
<tr>
<td>Florida Institutional Legal Services</td>
<td>$217,126.00</td>
</tr>
<tr>
<td>Civil Legal Assistance Project</td>
<td></td>
</tr>
<tr>
<td>Gainesville</td>
<td></td>
</tr>
<tr>
<td>Florida Justice Institute</td>
<td>$322,343.00</td>
</tr>
<tr>
<td>Miami</td>
<td></td>
</tr>
<tr>
<td>Florida Legal Services</td>
<td>$1,561,737.00</td>
</tr>
<tr>
<td>Tallahassee</td>
<td></td>
</tr>
<tr>
<td>Florida Rural Legal Services</td>
<td>$673,859.00</td>
</tr>
<tr>
<td>Lakeland</td>
<td></td>
</tr>
<tr>
<td>Florida State University College of Law</td>
<td>$5,000.00</td>
</tr>
<tr>
<td>Pro Bono Project</td>
<td></td>
</tr>
<tr>
<td>Tallahassee</td>
<td></td>
</tr>
<tr>
<td>Greater Orlando Area Legal Services</td>
<td>$212,098.00</td>
</tr>
<tr>
<td>Orlando</td>
<td></td>
</tr>
<tr>
<td>Guardianship Program of Dade County</td>
<td>$56,958.00</td>
</tr>
<tr>
<td>Miami</td>
<td></td>
</tr>
</tbody>
</table>

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 grants to continue to expand the scope of pro bono opportunities they offer private attorneys in their communities.
Florida Legal Services

two years before Christmas, a single mother of two young daughters entered the legal aid lobby in a state of hysterics. She had just been notified that her abusive former husband had obtained an ex-parte custody order for the girl's from a Texas court and had tried to remove the girls from school. Fortunately, the school had refused to turn over the children from her mother's care. Later, legal aid collaborated with a Texas legal aid program and had the Texas custody order set aside. Dade County Bar Association's Office of Public Service

Housing Matters:

16,428 Cases (17%)

Hundreds of residents in a rural northeastern Florida county lost their homes to a local man who sold and financed residential real estate. The man used legal documents for transfer of title that did not include required Truth-in-Lending disclosures and charged illegal fees and other costs in the transactions that led to eventual default and loss of homes by the homeowners. A legal aid and private attorney co-counseled the case and filed suit in Federal District Court, winning a settlement for the homeowners.

Florida Legal Services

Individual Rights Matters:

An 82-year-old woman thought she had purchased $12,000 worth of home improvements on her older home, but signed a note that would have ultimately cost her $43,000. When her contractor's work turned out to be totally unsatisfactory, she called the mortgage company to tell them not to pay for it. Much to her surprise, the contractor had been paid in full without her authorization. On her behalf, legal aid sued the contractor, the mortgage broker, and the mortgage holder. Legal aid then mediated a settlement that relieved the woman of any obligation under the note and discharged the lien.

Central Florida Legal Services

How Grantees Have Helped This Year

The Florida Bar Foundation Legal Aid Advocates Fellowships

Since 1999, the Foundation and its Florida funding partners have provided matching funds for 26 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 aid organizations.

In addition to addressing the civil legal needs of the poor in Florida, the Legal Aid Advocates Fellowship program enriches Florida's legal aid community by focusing the enthusiasm of individual Fellows who renew and revitalize a host program's legal advocacy. In 2001-02, the Foundation approved matching funds for seven Fellows in the Class of 2002-04 and was joined by funding partners The Florida Bar, the law firms of Greenberg Traurig and Gary, Williams, Parenti, Finney, Lewis, Miron, anus, Watson & Sperando; the Advocacy Center for Persons with Disabilities; and the Orange County Bar Association Foundation.

The Florida Bar Foundation Legal Aid Advocates Fellowships

Host Legal Assistance Program

Fellow

Project Name

Broward County Legal Aid, Inc.

Delaine Arrington

Family Pro Se Project

Florida Immigrant Advocacy Center

Lisa Frodman

Unaccompanied Minor's Project

Florida Institutional Legal Services

Casandra Capobianco

Disabled Prisoner Advocacy Project

Miami

Joseph Cohen

Subsidized Tuition Project

Legal Aid Service of Broward County

Misha Zelner

Juvenile Advocacy Project

Fort Lauderdale

Legal Aid Society of Palm Beach County

Shahar Vinayk

Elder Advocacy Project

West Palm Beach

Legal Aid Society of the Orange County Bar Association

Cara Hallmon

Teen Parent Project

Orlando

The Florida Bar Foundation

Daytona Beach

Florida Bar Immigration Advocacy Center

Central Florida Legal Services

Daytona Beach

Unaccompanied Minor's Project

Miami

Children's Impact Advocacy and Clearinghouse

Tallahassee

State University of Florida

Tallahassee

Children's Advocacy Center

Florida Legal Services

Miami

Children's Impact Advocacy and Clearinghouse for State Support

Tallahassee

Florida State University College of Law

Tallahassee

Children's Advocacy Center

Lawyers for Children America

Miami

Florida Legal Services

Miami

Children's Impact Advocacy and Clearinghouse for State Support

Tallahassee

Florida State University College of Law

Tallahassee

Children's Advocacy Center

Total

$363,000.00

Florida Legal Services

Central Florida Legal Services

Daytona Beach

$47,000.00

Florida Bar Immigration Advocacy Center

Miami

$15,000.00

Florida Legal Services

Tallahassee

$73,500.00

Florida State University College of Law

Tallahassee

$60,000.00

Lawyers for Children America

Miami

$15,000.00

Florida Legal Services

Miami

$25,000.00

Florida Legal Services

West Palm Beach

$25,000.00

Florida Legal Services

Miami

$25,000.00

Florida Legal Services

Tallahassee

$15,500.00

Florida Legal Services

Tallahassee

$170,000.00

Florida Legal Services

Miami

$100,000.00

Florida Legal Services

Coral Gables

$50,000.00

Florida Legal Services

Coral Gables

$15,000.00

Florida Legal Services

Coral Gables

$15,000.00
Law Student Assistance Grants

Public Service Fellows 2001-2002 Grant Awards

Eighty law students participated in the 2001-02 IOTA Public Service Fellows Program and contributed over 19,000 hours of direct public service. Students worked at legal aid offices, guardian ad litem programs, public defender offices, state attorney offices and other public service agencies.

- Florida Coastal School of Law: $14,000.00
- Jacksonville
- Florida State University College of Law: $23,000.00
- Tallahassee

TOTAL: $152,500.00

Legal Services Summer Fellowship Program

In cooperation with Florida’s fully accredited law schools, the Foundation administers a Summer Fellowship Program for its first and second year law students at Foundation funded legal assistance programs in Florida. In 2001-02, $95,000.00 was awarded for Summer 2002 Fellowships (LAP funds — $47,500.00; LSA funds — $47,500.00). Twenty-one law students were assigned to 20 legal assistance programs for eleven-week internships from May to August 2002.

Brianna Adams
- Brevard County Legal Aid
- Lorena E. Bravo
- Florida Immigrant Advocacy Center
- Kristen M. Cooley
- Florida Institutional Legal Services
- Ariel Oscar Diaz
- Florida Justice Institute
- Evan George
- Florida Rural Legal Services
- Lizzie L. Johnson
- Seminole County Legal Aid
- Taliana Laroche
- University of Miami Law School Children & Youth Law Clinic
- Lisa K. M. Agnew
- Community Law Program
- Luis A. M. Alfonado
- Withlacoochee Area Legal Aid
- DeShannon M. Conrado
- Three Rivers Legal Services
- Janet C. Cornis
- Legal Aid Service of Broward County
- Alexander S. Orlowsky
- Legal Services of Greater Miami
- Sarah J. Rumpf
- GulfCoast Legal Services
- Thomas E. Runyan, Jr.
- Legal Aid Service of Broward County
- Sylvia T. Simmons
- Florida Legal Services - Tallahassee
- Tianna Sousa
- Dade County Legal Aid
- Tim Stevens
- Legal Aid Service of Palm Beach County
- McKeeha J. Anneke Tann
- Legal Aid Society of the Orange County Bar Association
- Valerie A. Thompson
- Legal Services of North Florida
- Joanna Volpe
- Southern Legal Counsel
- Jennifer Wimberty
- Jacksonville Area Legal Aid

Total: $152,500.00

Russell Receives Award for State Legal Aid Funding Initiative

A year to the day from telling the Foundation’s board of directors of his plan to secure state funding for civil legal aid, outgoing Florida Bar President Terry Russell received the President’s Award for Excellence in recognition of his success. The Florida Access to Civil Legal Assistance Act was passed in the 2002 session of the Florida legislature and signed into law, providing $2 million as funding for pilot projects at legal aid programs in seven judicial circuits.

Foundation President Darryl M. Bloodworth presented Russell the Award in June at the Foundation’s annual dinner in Boca Raton. Several legislative leaders also were recognized that evening for their support of the state funding legislation: incoming Speaker of the Florida House of Representatives Johnnie B. Byrd, Jr., the chief House sponsor of the Act and former Bar Board of Governor member J. Dudley Goodlette, chief Senate sponsor Burt L. Saunders and House of Representatives member Carlos A. Laca.

Blackwell Honored for Fundraising Success

Foundation director Bruce Blackwell was singled out for his yeoman fundraising effort in 2002 with a President’s Award for Excellence from Foundation president Darryl M. Bloodworth. The award was presented at the Foundation’s June annual meeting for Blackwell’s “…extraordinary commitment of time, energy, and talent to increase financial support for the mission of the Foundation through his successful leadership of the 2001-02 Orlando Area Fellows Recruiting Campaign.”
Medal of Honor Awards

Improvements in the Administration of Justice Grant Program

Grantsmanship Philosophy
A goal of The Florida Bar Foundation is to focus grants in areas where IOTA funds can have a measurable impact. Toward that end, the Foundation concentrates IOTA 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;
- 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;
- 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.

Improvements in the Administration of Justice 2001-02 Grant Awards

- Public education and understanding about the law, including law-related education
  - The Florida Law Related Education Association, Inc. $181,125.00
  - Rebuilding law-related education
- Improvement and reform of the criminal, civil, and juvenile justice systems
  - Florida Legal Services, Inc. $334,300.00
- Promotion and support for public interest legal representation
  - Florida State University $150,000.00
  - Florida Institutional Legal Services for its Good Time Credit projects tied for first runner-up for the award. They were Florida Institutional Legal Services for its Good Time Credit project, the Title Loan project of Florida Legal Services for its Good Time Credit, and the Title Loan project of Florida Legal Services for its Good Time Credit.
- Trial Lawyers Care, Inc. $12,500.00
  - New York Free Legal Help for 9-11 Victims

Total $677,925.00

Steven M. Goldstein Award for Excellence

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 Florida Bar and had, for many years, served as the touchdown by which the Foundation measured the significance of its mission and its progress.

This competitive award program recognizes a project of significant impact undertaken by an IOTA legal assistance for the poor grantee. To be eligible, the project must affect a substantial number of poor persons, address an important poverty-law issue, involve a significant commitment of grantee program resources and staff, and reflect legal work which is of a high professional level.

The inaugural Steven M. Goldstein Award for Excellence went to Florida Legal Services in June 1999 for its Migrant Farmworker Justice Project in recognition of the tireless efforts and outstanding legal work of project attorney Robert A. Williams. The project represented migrant farmworkers in Gadsden County, Florida to protect them in the face of mass firings and arrests, advance their rights to organize and take collective action to improve and protect their employment, and ensure their rights to unemployment compensation.

The award was next presented in June 2001 to Florida Immigrant Advocacy Center, Florida Justice Institute and Florida Legal Services for their collaborative effort to successfully enforce the legal rights of immigrants in Immigration and Naturalization Services (INS) proceedings in Miami. Three class action law suits were filed against INS challenging its delays of up to three years in processing citizenship applications and its summary denial of medical and fee waivers to qualified immigrants. As a result of the legal challenges, the INS adopted policies to rectify its practices.

Also in 2001, three grantee organization projects tied for first runner-up for the award. They were Florida Institutional Legal Services for its Good Time Credit project, the Title Loan project of Florida Legal Services for its Good Time Credit, and the Title Loan project of Florida Legal Services for its Good Time Credit.

Martha W. Barnett receives the prestigie Medal of Honor Award for an attorney on June 20, 2002, in Boca Raton. Darryl M. Bloodworth presents the award.

Raul G. Barrera, a paralegal with the Migrant Farmworker Justice Project of Florida Legal Services, was presented with the 2002 Medal of Honor for a non-lawyer. Barrera was recognized for more than 35 years of dedicated and selfless service in the cause of securing justice for migrant farmworkers in Indiana, Texas and Florida by providing outreach services and maintaining contact with isolated migrant farmworkers.

His accomplishments are the result of steadfast and tireless commitment, offering inspiration to the abused worker that justice will be served on their behalf.

Excerpt from Medal of Honor Citation for Martha W. Barnett
For dedication to improving the administration of justice as an inspired leader of the organized bar, passionate defender of the legal rights of the impoverished and of those with unpopular causes, and consummate lawyer typifying the highest ideals of the legal profession.
In 1991, the Foundation established an Endowment as a permanent source of support for all of the Foundation’s charitable activities. Initial funding for the Endowment came from $1 million in unrestricted IOTA investment earnings and a $250,000 gift from confidentiality which will fund ID TA grants. In 2001-02, additional Endowment funding came from $98,170 in Fellows’ pledge payments and other contributions increasing total Endowment net assets to $2,772,830.

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

The Fellows of The Florida Bar Foundation are concerned with improving Florida’s legal system and share a common interest in supporting the charitable purposes and share a common interest in supporting the charitable purposes and support the work of the Foundation — our community to help people when their justice system — the very heart of the Florida’s legal aid system.

Although IOTA funds are a significant source of support for the Foundation’s primary mission, we can and need to do more. Working together, we can continue our charitable activities and enhance our justice system. We do that primarily by providing legal aid to indigent individuals and the broader public—consistently demonstrating their sense of responsibility 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’s Fellows Program and make your investment in justice.

The Florida Bar Foundation
109 East Church Street, Suite 405
Ocala, FL 34470-1533
Toll free: 800.541.2195
Fax: 407.839.0287
This year, two accomplishments are particularly noteworthy. I think, as reflections of the Foundation's efforts to fulfill its mission and to be responsive to our principal constituents — the Florida Supreme Court, the legal profession, and our state's legal assistance organizations and the clients they serve.

**Fundraising**
A sampling of members of The Florida Bar told us several years ago that the Foundation was missing a bet by not engaging in traditional fundraising. We listened and did just that. Not that we expect to replace IOTA revenue anytime soon, but, we can raise funds to offset some, if not all, of the drops in IOTA revenue from interest rate cuts. And, we can make our case for support of special grant programs and initiatives such as children's legal services. Over the next three years, our program will focus on expanding the number of Foundation Fellows through campaigns in major Florida cities. At the same time, we will approach Florida attorneys and others capable of helping the Foundation achieve its mission through planned giving and major gift initiatives for special projects and programs, including gifts to The Florida Bar Foundation Endowment Trust. In addition, we will continue to encourage greater numbers of Florida Bar members to contribute to the Lawyers Challenge for Children on the annual Bar Fee Statement. Of course, a critical element of our fundraising program is close coordination of our fundraising activities with those of our grantees. We want to be sure that our fundraising successes are in addition to those of the organizations we support.

As reported elsewhere in this annual report, fundraising results to date are encouraging. It's been exciting to see how well the Foundation's board has stepped up to the plate, working through the development committee. On that committee, current and past Foundation officers and board members, Endowment trustees, former Bar presidents, and other leading Florida attorneys give readily of their time and talent to guide our fundraising efforts and participate directly in fundraising appeals. We are incredibly fortunate for their commitment to the Foundation's mission. Their enthusiasm for the work of the Foundation and our grantees is the best gauge of our ultimate fundraising success.

**Communications**
The Foundation's communications program was established in 2001 to achieve the following goals:

- To bolster visibility among members of Florida's legal community;
- To create an environment that encourages philanthropic gifts to the Foundation;
- To build a base of support for the Foundation's mission among key opinion leaders; and
- To become more responsive to ongoing media opportunities in order to comment on and support legal assistance to low-income clients, particularly work conducted by Foundation grantees.

Last summer, we launched our website: www.flabarfndn.org. This first phase of the website carries general information about the Foundation, our grant programs and grantees, assistance for attorneys and financial institutions in complying with the IOTA rule, and information for the media. Next up will be the ability to download the Foundation's on-line and to make working with us as a board or committee member, grant applicant or grantee more efficient and effective through more on-line information and interaction.

We've also developed a new logo which can be seen — and we hope — admired in this annual report. In addition, we are revising and re-designing brochures and developing new materials for use by current and past Foundation officers and other supporters to talk about the Foundation and the work of its grantees to local bar associations, civic and business groups, etc.

Much more needs to be done, but we're committed to success in communicating more effectively about the Foundation — primarily by telling the stories of our grantee organizations, especially our legal aid grantees, as they work to protect the legal rights of the poor and vulnerable.

**Special Thanks**
These accomplishments were possible only because of the generous contributions of time, talent and energy of the many volunteers who serve on the Foundation’s board of directors and committees, and our dedicated and professional staff.

Special thanks go as well to the attorneys who contributed to our successes through pro bono legal services to the Foundation itself:

- Richard E. Burke
- Gray, Harris & Robinson, Orlando
- James C. Rinaman, Jr.
- M arks, Gray, Conroy & Gibbs, Jacksonville
- Sylvia H. Walbolt
- Carlton Fields, Tampa
- Gerald W. Weedon
- Jacksonville
- Donald C. Works, III
- Jackson, Lewis, et al, Orlando

This work to improve the Foundation's fundraising and communications efforts is undertaken to ensure that funding will always be available for the programs we serve. We are proud to provide the leadership and funding needed to achieve the goal of "equal justice for all" in Florida.
IOTA Revenues Remain Stable In FY 2001-02

Despite continued declining interest rates, annual IOTA revenues remained stable at $12 million in FY 2001-02 due to implementation of revisions to the IOTA rule and increases in legal activity in Florida. To increase revenues for IOTA’s charitable purposes, on June 14, 2001, the Florida Supreme Court approved amendments to the IOTA Rule requiring banks to pay IOTA accounts the highest interest rate or dividend generally available to their similarly situated non-IOTA customers. Unfortunately, at the same time the rule was amended, interest rates began a rapid decline. As a result, IOTA revenue increases from the rule amendments were lower than expected.

Nonetheless, banks across the state have been cooperative in implementing the rule amendments. Further, brokerage houses have contacted the Foundation to discuss offering government money market funds to increase IOTA revenues. For example, a 100 basis point increase in interest rates could generate an additional $6 million in net IOTA revenue.

Profile of the IOTA Account Portfolio as of June 2002

Total Number of IOTA Accounts ....................................................... 21,050
Total Principal Balance in IOTA Accounts ........................................ $1.91 Billion
Average Balance per Accounts ......................................................... $92,200
Number of Lawyers Participating in IOTA ........................................ 27,634
Number of Banks Participating in IOTA ........................................... 303

IOTA Directors Honored For IOTA Rule Amendments

Two Foundation directors were recognized with the inaugural President’s Award for Excellence by A. Hamilton Cooke of Jacksonville for securing amendments to the IOTA rule which calls for parity treatment in interest rates by participating financial institutions. Cooke, the Foundation president during 2000-01, announced the awards to Kathleen S. McLeroy and Andrew M. O’Malley at the June 2000 meeting of the Foundation’s board of directors. He cited McLeroy’s and O’Malley’s work as essential to the Foundation’s success in obtaining approval from the Florida Supreme Court for the rule amendments.

Excerpt from Award

“For successful efforts in helping The Florida Bar Foundation to achieve amendments to the IOTA Rule to increase funding for legal assistance to low-income Floridians made possible, in great measure, by your positive commitment, energy, wisdom and great wit.”

Foundation Directors Honored For IOTA Rule Amendments

Two Foundation directors were recognized with the inaugural President’s Award for Excellence by A. Hamilton Cooke of Jacksonville for securing amendments to the IOTA rule which calls for parity treatment in interest rates by participating financial institutions. Cooke, the Foundation president during 2000-01, announced the awards to Kathleen S. McLeroy and Andrew M. O’Malley at the June 2000 meeting of the Foundation’s board of directors. He cited McLeroy’s and O’Malley’s work as essential to the Foundation’s success in obtaining approval from the Florida Supreme Court for the rule amendments.

Excerpt from Award

“For successful efforts in helping The Florida Bar Foundation to achieve amendments to the IOTA Rule to increase funding for legal assistance to low-income Floridians made possible, in great measure, by your positive commitment, energy, wisdom and great wit.”

The Florida Bar Foundation
109 East Church Street, Suite 405 | P.O. Box 1553 | Orlando, FL 32802-1553
800-541-2195 | Tel: 407-843-0045 | Fax: 407-839-0287
E-mail: fbf@flabarfndn.org | www.flabarfndn.org