

2021-22

ANNUAL REPORT

THE FLORIDA BAR FOUNDATION

Message from 2021-22 President Connie Bookman

RESEARCH was the theme during my year in leadership! I distinctly remember daily feelings of awe and gratitude for the incredible mind bank and giftedness that attorneys and public members offered in moving the mission of The Florida Bar Foundation forward. No decision was ever made without thorough investigation and discussion. Because of that commitment, the Foundation is standing at its leanest and strongest ever.

The creation of FIVE Ad Hoc committees enhanced our commitment of transparency and inclusiveness in all of our policy making.

The **Overall Review Committee** studied, reviewed and made recommendations regarding the Foundation's brand, name, mission and mission statement. A daunting task for 14 committed members! Fortunately, the Emmy Award-winning Gary Yordon guided us in these five decisions:

- The mission does not need to be and should not be changed;
- The mission statement should be changed and clarified;
- Adopt and use a fictitious name that better reflects our mission and purpose;
- Endeavor to change and refine our messaging; and
- Create and refine our brand to reflect the changes above.

The **Audit RFP Ad Hoc Committee** was charged with overseeing the planned periodic review of the Foundation's current auditor and possible replacement. A request for proposal to 21 selected auditor firms

was prepared. Ultimately, four finalists were identified and interviewed, with the committee recommending the retention of Carr, Riggs & Ingram (CRI) as the Foundation's new annual auditor.

The **Paul Doyle Children's Advocacy Award Criteria Review Committee** and the **Goldstein-Van Nortwick Award Selection Committee** reviewed the selection and qualifications criteria for the awards and recommended changes for consideration.

The Grants Committee formed the **EJW Policy Ad Hoc Committee** to develop a formal policy relating to the Foundation's funding and participation in the Equal Justice Works program. The Grants Committee also recommended and the board approved in concept, the development of a policy regarding receipt, processing, and administration of donations.

Eight grant programs were approved for funding of \$5,880,000 during my year.

The Foundation's FY 2021-22 operating budget was presented and approved by the board in the amount of \$2,579,365, which represented a 10.5% reduction from the Foundation's FY 2020-21 operating budget. Actual spending for FY 2021-22 was \$2,159,709, which was \$419,656 or 16% below budget. Now, that's great work!

After three years of intense work and study, the Long-Range Technology Plan of the **Technology and Training Committee** was approved. To streamline operations of the Foundation, the majority of technology assets



were transferred to legal aid organizations that are better equipped to maintain and run them.

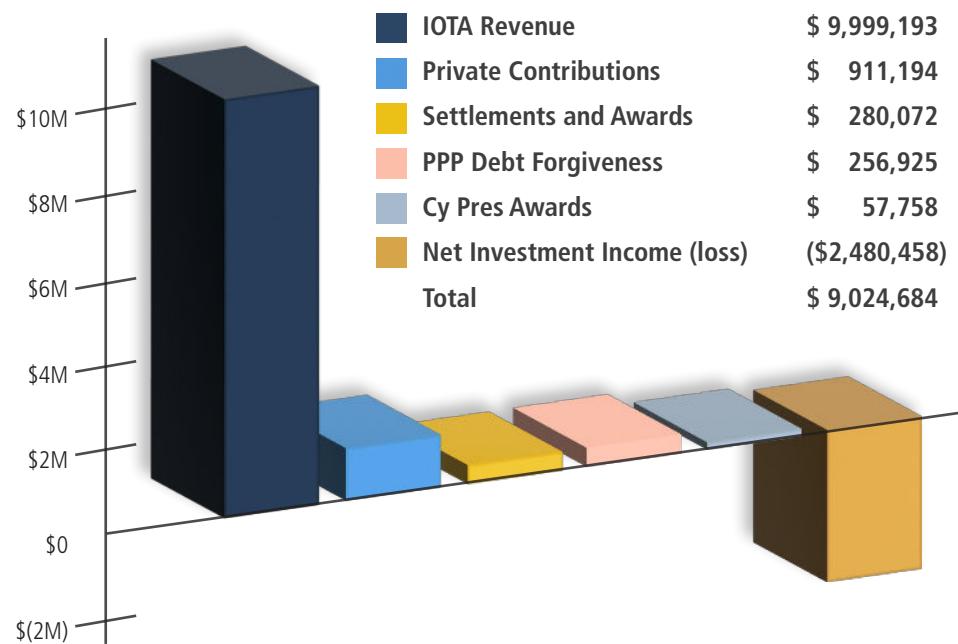
IOTA Rule implementation

I have always found that change, though uncomfortable at first, is good! As is the case of the new IOTA rule. The Foundation continued its focus on expenses associated with its entire operation, as well as those required to administer IOTA funds pursuant to Rule 5.1-1(g). The Foundation sought input from all stakeholders and grantees regarding its grants and awards and all other obligations and duties consistent with its mission, specifically including those required under Rule 5.1-1(g). Those efforts included consideration of either terminating, renegotiating or sub-leasing the Foundation's current rented space. Exciting times for the Foundation!

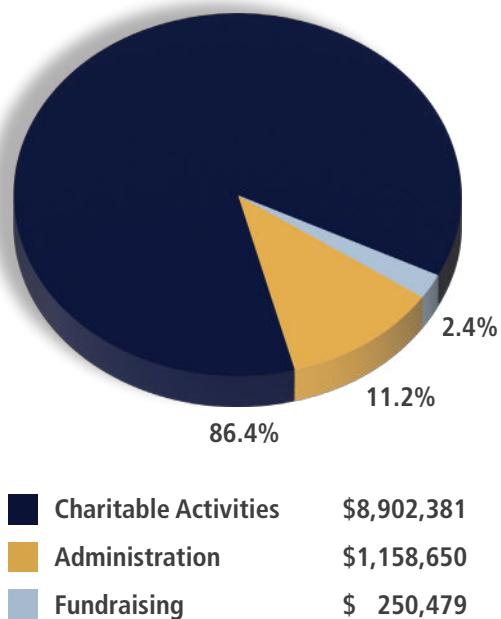
see MESSAGE, p. 9

2021-22 FISCAL SNAPSHOT

FUNDING SOURCES



HOW FUNDS ARE SPENT



GRANT EXPENDITURES

MESSAGE, from p. 8

Purchase of new building

The Foundation made a financially prudent choice to purchase a building to house its operations, rather than continuing to rent space. 175 Lookout Place is the Foundation's new home.

Alan B. Bookman Service in Leadership Award

During my year as president, I lost the love of my life, Alan B. Bookman, an

honorable man and past president of The Florida Bar. I could not have asked for a more loving and caring support system than my friends and colleagues of the Foundation and past presidents of The Florida Bar.

More than \$100,000 was quickly raised to honor Alan and to provide an annual grant to a lawyer who represents the character and values of Alan. His name

will go on in perpetuity as this lawyer gifts \$5,000 each year to a legal aid organization of his or her choice. For that I am very grateful.

Awe and gratitude capture the essence of all that the Foundation does to assure that everyone living in Florida has a voice. God bless you for your support.

The Legacy for Justice

The Legacy for Justice recognizes those who have included the Foundation in their estate planning, made a gift or pledge of more than \$10,000, directed a significant cy pres award to the Foundation or facilitated a colleague's major gift. We offer the members of this prestigious group our sincerest gratitude for their deep and abiding commitment to the Foundation. (Through April 14, 2023)

Louie N. Adcock Jr.* **	Florida Lawyers Legal Insurance Corporation	Robert W. Murphy
Akerman LLP	Florida Lawyers Mutual Insurance Company	Anonymous
Anonymous Fund - Central Florida Foundation	The Flourish Fund of Gulf Coast Community	John* and Pam Noland*
Anonymous Fund - Community Foundation of Sarasota County, Inc.	Foundation	John* and Nora Patterson*
Tod Aronovitz*	Brian K. Gart* **	Roderick N. Petrey*
The Batchelor Foundation	Maria Gonzalez*	Polaszek, Berman, Hansen
James L. Bell*	Deborah P. Goodall*	Lou Ann Powell* **
Bruce B. Blackwell*	GrayRobinson, PA	David C. Prather*
F. Paul Bland Jr.	William O.E. Henry* **	Stephen A. Rappenecker
The BMC Charitable Foundation, Inc.	Michael J. Higer*	Ruden McCloskey Smith Schuster & Russell, PA
Buchanan Ingersoll & Rooney	J. Wayne Hogan*	William P. Sklar*
Philip M. Burlington	Holland & Knight LLP	Searcy Denney Scarola Barnhart & Shipley, PA
John P. Cardillo*	Michael J. Howell, The Howell Family Fund	John Woolslair Sheppard* **
Valorie S. Chavin	Joseph D. Hudgins	Geoffrey S. Stahl
A. Hamilton Cooke*	H. Scott Huizenga	Larry* and Pat Stewart
Carl J. Domino*	T. Glenn Jackson Jr.* **	Rhonda D. Stroman*
Emmanuel, Sheppard & Condon	Anonymous	Stroock Stroock & Lavin LLP
Sean Estes*	Scott T. Johni	Russell Troutman* **
Richard A. Fisher	The JPB Foundation	Marvin A. Urquhart Jr.**
Robert W. Fisher* **	Theodore J. Leopold	Hon. William A. Van Nortwick Jr.* ** and
Anonymous	Jeffrey M. Liggio*	Maria Henderson*
The Florida Bar Appellate Practice Section	Laird A. Lile*	Robert Craig Waters*
The Florida Bar Business Law Section	Tom H. Loffredo*	Marshall C. Watson
The Florida Bar Criminal Law Section	Erin Whittemore Lohmiller	Matthew D. Weidner
The Florida Bar Family Law Section	Donny* and Monica MacKenzie	Hon. John D. Wessel* **
The Florida Bar General Practice, Solo and Small Firm Section	Diana Martin	Jewel White*
The Florida Bar Real Property, Probate & Trust Law Section	Miles A. McGrane, III*	Kent G. Whittemore
The Florida Bar Trial Lawyers Section	Terry L. Merlin	John Yanchunis*
The Florida Bar Young Lawyers Division	Kathleen S. McLeroy*	E. Clayton Yates
	Anonymous	Burton Young*
	Melissa A. Moss*	Edward H. Zebersky
	Mellon United National Bank	

* Florida Bar Foundation Fellow ** Deceased

2,303,883

people benefited either directly or indirectly because their civil legal cases were taken by Foundation-funded grantees in calendar year 2021.

2021-22 Florida Bar Foundation Fellows



Florida Bar Foundation Fellows pledge \$1,000 to support the Foundation. Learn more at www.TheFloridaBarFoundation.org/Fellow.

New Fellows from July 1, 2021 to June 30, 2022:

Gale M. Bobenhausen
C. Jade Davis
Katie Fackler
Joseph Fasone
Cynthia L. Hall

Tiffany S. Hilton
Allyson Hughes
Richard P. Morris
James P. Schwarz
Sarah R. Sullivan

Markham Leventhal	Randall Wilson, C.P.A.*	Sheryl E. Berkowitz*	Sharla R. Charpentier
Rutledge R. Liles*	Sandra K. Wolkov*	Jed Berman	Douglas A. Cherry*
The Maher Law Firm	Gwynne A. Young*	William Berzak	Min Cho*
David Manz*	Bronze Society	Kathleen Bickelhaupt	Susan H. Churuti*
Massachusetts Bar Association	(\$2,000-4,999)	Nancy E. Biesinger*	Hon. Nikki A. Clark*
Charles R. Mathis IV*	Ramón A. Abadin*	Brian L. Bilzin*	Jay M. Cohen
Susan H. Maurer*	David Abbey*	Lauren C. Bingham*	Hon. Robert S. Cohen*
Hon. Raymond McNeal*	Louie N. Adcock Jr.* **	James I. Black III	Gerald R. Colen
Tatiana Melnik	David Adler	Hon. Deb S. Blechman*	Craig Coller*
Joseph P. Milton* **	Steven N. Ainbinder*	Byron B. Block*	Sonia Colon
Linda Moore*	David Albert	Jan Blue	Dr. Douglas E. Combs
Howard M. Neu	Marcy L. Aldrich*	Hon. Ellyn S. Bogdanoff*	Christy Compro
Ohio State Bar Association	Lynn Alfano	Sarah A. Bohr*	Jonathan Compton
Oklahoma Bar Foundation	Allen, Dyer, Doppelt, Milbrath &	Carlos J. Bonilla*	Kenneth Conrad
Edith G. Osman*	Gilchrist, P.A.	Ronald L. Book*	Charles Coomes
Pajcic & Pajcic PA	Julie W. Allison	William R. Boose III*	Leslie L. Cooney*
Thomas F. Panza*	Cristina Alonso*	John P. Booth	Deborah S. Corbishley*
Daryl D. Parks*	Eric Alvarez	Boston Holding Company	William W. Corry*
Parks & Crump, LLC	Cesar L. Alvarez*	Brooke J. Bowman	Sarah Cortvriend*
Anonymous	Georgie Angones*	Dana G. Bradford*	Patrick Coughlan
Robert M. Rhodes*	Paolo Annino*	Debra Braga* **	Sara Courtney-Baigorri*
Dennis Richard*	Hon. Harry L. Anstead*	Jack P. Brandon*	Dale W. Cravey
William H. Robinson Jr.*	Susann Anstead*	Alana C. Brenner*	Gail E. Crawford
Anne B. Robjohns*	Linda Appleby	Matthew G. Brenner*	Manuel L. Crespo*
Rogow Greenberg Foundation Inc.	Lourdes M. Armengol	Alejandro Brito*	Anonymous
Juana Maria Rojas	Tod Aronovitz*	Donna Brooks*	Lynda Crouse
Rothman & Associates, P.A.	Alan H. Aronson*	Broward County Bar Association	Patricia Simone Cruz
Lee Sanderson	Margarete P. Ashmore	Young Lawyers Section	Lisette Currier-Martinez
Hala A. Sandridge*	Jack Attias	Bonnie A. Brown	Clinton A. Curtis* **
Gerold L. Schiebler, M.D.	Jonathan L. Awner*	Gregory P. Brown*	Garrett Cutler
Tracey L. Schneider	Scott L. Baena*	Jay A. Brown*	Stephen Cypen*
Anne R. Schultz	Anonymous	Julie Brown	Howard L. Dale*
Christian D. Searcy*	Douglas R. Bald*	Lorna E. Brown-Burton*	Talbot D'Alemberte* **
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	Jorge Gurian		Marsha Madorsky*
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Barnaby L. Min*	Hon. Gregory A. Presnell*	Hon. Edwin A. Scales III*	Scott Stichter*
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John Morse	Johanna Ravelo	Carl Schuster*	Harry Tempkins*
Rene V. Murai*	Kimberly Reddy	David Schwartz	O. Stephen Thacker II*
John C. Murrow*	Diane E. Reese	James P. Schwarz*	Adrian P. Thomas
Karen Myatt*	James Regan	Gregory L. Scott*	Dean D. Thomas
James Myers	Laura M. Reich*	Stephen H. Sears	James D. Thomas
Diane C. Nardone	Benjamine Reid*	William M. Seider*	Daniel H. Thompson*
Claudia M. Negrette-Gonzalez	Raymond P. Reid Jr.*	Lawrence E. Sellers Jr.*	John M. Thomson*
The New York Bar Foundation	Sanford Reinhard	Mark A. Sessums*	Melinda Thornton*
Hon. James P. Nilon*	Richard Reinhart*	Robert L. Shaver	Gary P. Timin
Eucharia Nnadi	Raymond A. Reiser*	Detra Shaw-Wilder*	Jennifer C. Tindall
		L. David Shear* ***	Anthony J. Titone*

David Toal	Astrid M. Vellon	Il S. We	Michael Wolf
Joel Toomey*	Angela C. Vigil*	Charles T. Wells*	Jacquelyn L. Wooden*
Anonymous	Doris Vigo	Linda F. Wells*	Council Wooten Jr.*
Ronald Toward*	Jorge P. Villoldo	The Welsh Charitable Trust	Donald A. Workman*
George E. Tragos*	Jennifer L. Vozne	Claudia Wheeler*	Anonymous
A. Rodgers Traynor Jr.*	Carl Wagner	John G. White III* **	Diana M. Yankee
Trenam Law	Sylvia H. Walbolt*	Marva Wiley	Tad A. Yates*
Ronald J. Trevisani	Hon. David S. Walker*	John W. Williams Jr.*	Grisel Ybarra*
Christopher M. Tuccitto	Charles T. Wallace	Warren Williams	Cassie M. Yde*
M. Stephen Turner*	Anonymous	Donna Wilson	Anthony A. Yezbick
Diane H. Tutt*	Peter G. Walsh	John Wilson	Roy C. Young
Michael S. Tyde	Daniel I. Ward	Kerry Wilson*	Stephen N. Zack*
John A. Van Ness*	Gregory C. Ward*	Jennifer D. Wimberly*	Nivine K. Zakhari
Wallace Van Nortwick	Jeffrey W. Warren*	William "Bill" Winters	Stuart Ziegler
Brian P. Vassallo	Michelle M. Wasielewski	Wm. Reece Smith Jr. Leadership	Yasmine B. Zyne
Milagros Vazquez	Robert Wayne*	Academy, Class II*	

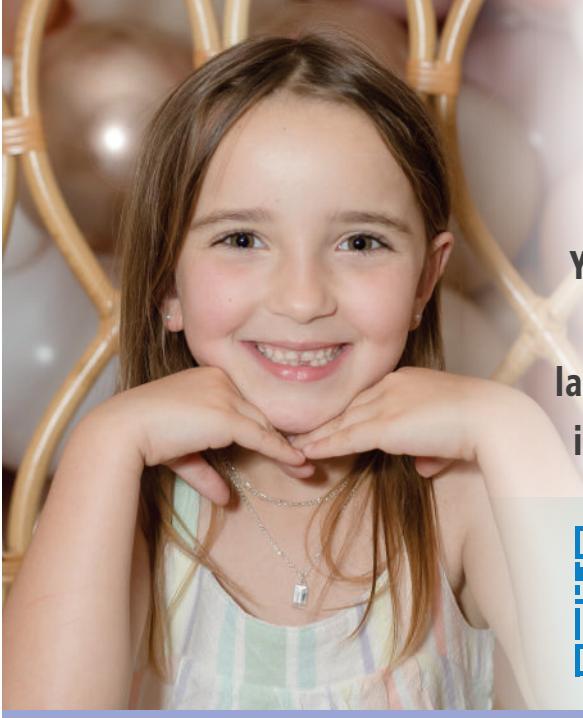
*Florida Bar Foundation Fellow

**Deceased

2022 Cy Pres Awards

Under cy pres, courts can approve a charitable donation out of unclaimed class action funds, or a direct grant in lieu of damages to an organization that could vindicate class member rights in the future. To learn how you can direct a cy pres award to The Florida Bar Foundation, contact Michelle Fonseca at 407-960-7019 or visit www.TheFloridaBarFoundation.org/cypres.

Award	Case	Lawyers
\$59,662	Terrance Guidry v. Penn Credit Corporation	John Yanchunis, Octavio Gomez, Patrick A. Barthle II of Morgan & Morgan PA, Tampa; Dale Golden of Golden Scaz Gagain, PLLC, Tampa
\$2,132	Finerman v. Marriott Vacations Worldwide Corporation et al.	John Yanchunis, Marcio W. Valladares, Patrick A. Barthle II of Morgan and Morgan PA, Tampa; Steven Teppler of Abbott Law Group, P.A., Jacksonville
\$57,558	Northwest Federal Credit Union v. Donna E. Franklin	Robert W. Murphy of Murphy Law Firm, Ft. Lauderdale, FL



Every child deserves a forever home.

Your donation to our Children's Legal Services program supports children like Charlotte, who need legal aid lawyers to stand up for them in court, advocate for them in the child welfare system and protect their interests.



Six-year-old Charlotte spent three years in foster care. Her attorney ad litem, whose work is supported by The Florida Bar Foundation, advocated for her, ensuring she had the best chance at finding her forever home.

Visit www.TheFloridaBarFoundation.org/children to donate.