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
LEADERSHIP AND FUNDING

**THE FLORIDA BAR FOUNDATION**

Annual Report

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.

2021-22 FISCAL SNAPSHOT

**FUNDING SOURCES**

- IOTA Revenue: $9,999,193
- Private Contributions: $911,194
- Settlements and Awards: $280,072
- PPP Debt Forgiveness: $256,925
- Cy Pres Awards: $57,758
- Net Investment Income (loss): $(2,480,458)
  
  Total: $9,024,684

**HOW FUNDS ARE SPENT**

- Charitable Activities: $8,902,381
- Administration: $1,158,650
- Fundraising: $250,479

**GRANT EXPENDITURES**

- COVID-19 Relief: $2,476,961
- IOTA Trial Run: $1,250,000
- Loan Repayment Assistance Program Forgiveness: $1,018,355
- Children’s Legal Services: $994,483
- Community Economic Development: $855,000
- Improvements in the Administration of Justice: $780,000
- Equal Justice Works Fellowship Program: $298,000
- Law School Civil Legal Clinics: $250,000
- Engle Grant Program: $138,572
- Other Grants: $90,431
- TOTAL: $8,151,802

MESSAGE, from p. 8

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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.* **
Akerman LLP
Anonymous Fund - Central Florida Foundation
Anonymous Fund - Community Foundation of Sarasota County, Inc.
Tod Aronovitz*
The Batchelor Foundation
James L. Bell*
Bruce B. Blackwell*
F. Paul Bland Jr.
The BMC Charitable Foundation, Inc.
Buchanan Ingersoll & Rooney
Philip M. Burlington
John P. Cardillo*
Valorie S. Chavin
A. Hamilton Cooke*
Carl J. Domino*
Emmanuel, Sheppard & Condon
Sean Estes*
Richard A. Fisher
Robert W. Fisher* **
Anonymous
The Florida Bar Appellate Practice Section
The Florida Bar Business Law Section
The Florida Bar Criminal Law Section
The Florida Bar Family Law Section
The Florida Bar General Practice, Solo and Small Firm Section
The Florida Bar Real Property, Probate & Trust Law Section
The Florida Bar Trial Lawyers Section
The Florida Bar Young Lawyers Division

Florida Lawyers Legal Insurance Corporation
Florida Lawyers Mutual Insurance Company
The Flourish Fund of Gulf Coast Community Foundation
Brian K. Gart* **
Maria Gonzalez*
Deborah P. Goodall*
GrayRobinson, PA
William O.E. Henry* **
Michael J. Higer*
J. Wayne Hogan*
Holland & Knight LLP
Michael J. Howell, The Howell Family Fund
Joseph D. Hudgins
H. Scott Huizenga
T. Glenn Jackson Jr.* **
Anonymous
Scott T. Johni
The JPB Foundation
Theodore J. Leopold
Jeffrey M. Liggio*
Laird A. Lile*
Tom H. Loffredo*
Erin Whittemore Lohmiller
Donny* and Monica MacKenzie
Diana Martin
Miles A. McGrane, III*
Terry L. Merlin
Kathleen S. McLeroy*
Anonymous
Melissa A. Moss*
Mellon United National Bank

Robert W. Murphy
Anonymous
John* and Pam Noland*
John* and Nora Patterson*
Roderick N. Petrey*
Polashek, Berman, Hansen
Lou Ann Powell* **
David C. Prather*
Stephen A. Rappenecker
Ruden McCloskey Smith Schuster & Russell, PA
William P. Sklar*
Searcy Denney Scarola Barnhart & Shipley, PA
John Woolslair Sheppard* **
Geoffrey S. Stahl
Larry* and Pat Stewart
Rhonda D. Stroman*
Stroock Stroock & Lavin LLP
Russell Troutman* **
Marvin A. Urquhart Jr.*
Hon. William A. Van Nortwick Jr.* ** and Maria Henderson*
Robert Craig Waters*
Marshall C. Watson
Matthew D. Weidner
Hon. John D. Wessel* **
Jewel White*
Kent G. Whittemore
John Yanchunis*
E. Clayton Yates
Burton Young*
Edward H. Zebersky

* 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
Allison Hughes
Richard P. Morris
James P. Schwarz
Sarah R. Sullivan
Lifetime Giving Circles

Lifetime contributions as of April 17, 2023. Does not reflect pledges or in-kind gifts.

**Judge’s Society ($500,000–999,999)**
- Anonymous
- John A. Yanchunis*

**Advocate’s Society ($250,000–499,999)**
- The Batchelor Foundation, Inc.
- The Florida Bar Young Lawyers Division
- Anonymous
- Robert W. Murphy

**Barrister’s Society ($100,000–249,999)**
- The Florida Bar Business Law Section
- The Florida Bar Criminal Law Section
- The Florida Bar Trial Lawyers Section
- Florida Lawyers Mutual Insurance Company
- Ruden McClosky

**Counselor’s Society ($50,000–99,999)**
- Bruce F. Iden
- Carolyn Huggins
- The Howell Family Fund
- Michael J. Howell

**Platinum Society ($25,000–49,999)**
- AMGEN PAC
- Buchanan Ingersoll & Rooney PC
- Mary E. Cantrell*
- Carlton Fields, P.A.
- Coker Law
- Ann D. Davidson*
- Carl J. Domino*

**Gold Society ($10,000–24,999)**
- Akerman LLP
- Anonymous Fund - Community Foundation of Sarasota County
- Rosemary E. Armstrong*
- Kimberly A. Bald*
- Berger Singerman LLP
- Darryl M. Bloodworth*
- The BMC Charitable Foundation Inc.
- Burr & Forman LLP
- John P. Cardillo*
- Central Florida Foundation
- Henry M. Cox, III*
- Mary C. Cox*
- Mary G. Croft-Henry
- Jane E. Curran*
- Robert Dennis
- Jesse H. Diner*
- Joanne Flanagan
- The Florida Bar Solo and Small Firm Section
- The Flourish Fund of Gulf Coast Community Foundation
- Foundation for Improvement of Justice Inc.
- John W. Frost II*
- Stuart Z. Grossman*
- John F. Harkness Jr.*
- William O.E. Henry* **
- Hill, Ward & Henderson, P.A.
- T. Glenn Jackson Jr.* **
- Gary S. Lesser*
- The Lightning Foundation Inc.
- Laird A. Lile*
- Juliette E. Lippman*
- Terry L. Merlin
- Anonymous
- Melissa A. Moss*
- Anonymous*
- Ohio State Bar Foundation
- Thomas R. Oldt*
- Patsy Palmer*
- Hon. Barbara J. Pariente*
- Peterson & Myers, P.A.
- Roderick N. Petrey*
- Hon. Peggy A. Quince*
- James C. Rinaman Jr.*
- Catherine A. Roth
- David B. Rothman*
- Hon. Patricia A. Seitz*
- John W. Sheppard* **
- Mitchell E. Silverstein
- William P. Sklar*
- Adele I. Stone*
- Stroock Stroock & Lavin LLP
- United States District Court Middle District of Florida
- Marvin A. Urquhart Jr.*
- Hon. William A. Van Nortwick Jr.* **
- Hon. Suzanne H. Van Wyk*
- Matthew D. Weidner
- Hon. John D. Wessel* **
- Carol A. Wherry*
- Jewel White*
- Burton Young*

**Silver Society ($5,000–9,999)**
- Richard Abramowitz*
- David P. Ackerman*
- Hon. Alfonso L. Adderly
- William Akers III
- Allegheny County Bar Association
- Francisco R. Angones*
- Marcella Auerbach*
- David P. Babner*
- Mark O. Bagnall*
- BankAtlantic Foundation
- Julio C. Barbosa
- Jonathan D. Beloff*
- Mary-Anne Bestebreurtje*
- Bigglesworth Family Foundation
- Birnbaum Lippman & Gregoire, PLLC
- Alan B. Bookman* **
- Connie Bookman*
- Michele Booth
- David Bridger
- Hon. Catherine M. Brunson*
- L. Kinder Cannon, III*
- Hon. Hugh A. Carthiers Jr.*
- Patrick J. Casey*
- Howard C. Coker*
- Greg W. Coleman*
- Ian Comisky*
- A. Hamilton Cooke*
- Father Timothy Corcoran, III
- Ashley Cox*
- Hon. Marva L. Crenshaw*
- Critton, Luttier & Coleman, LLP
- Michele K. Cummings*
- William H. Davis*
- Dean, Mead, Egerton, Bloodworth DI Law Group
- Jesse T. Diamandis
- Paul C. Doyle*
- Kathleen A. Dubin
- Stephen C. Eisenhardt
- Mary G. Evertz* **
- Eddie Farah*
- Luis L. Fernandez
- Michael W. Fisher*
- Florida Justice Technology Center
- The Florida Bar Citizens Advisory Committee
- The Florida Bar City, County and Local Government Section
- Hon. Gill S. Freeman*
- Paige A. Greenlee*
- Greenspoon Marder, P.A.
- Greer Seitz Charitable Fund
- Merrick “Rick” L. Gross*
- Peter J. Gulden III*
- Douglas M. Halsey*
- Hopping Green & Sams, P.A.
- Michael J. Howell
- The Howell Family Fund
- Carolyn Huggins
- Bruce F. Iden
- Pamela M. Jones*
- Philip N. Kabler*
- KE Law Group, PLLC
- Robert G. Kerrigan*
- Hon. Larry Klein*
- Elizabeth M. Knoblock
- Jasmine Lee-Gaumier*
- Gary Leppla*

* Continued on p. 12
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.