

SPEAKING OF JUSTICE

NEWS FROM FFLA, FORMERLY THE FLORIDA BAR FOUNDATION
Volume 16 Issue no. 1

Florida Bar Foundation rebrands, changes name to FFLA



FFLA

FUNDING FLORIDA LEGAL AID

The Florida Bar Foundation is now known as FFLA. The nonprofit organization, which is the designated administrator of Florida's Interest on Trust Accounts (IOTA) program, has changed its name and rebranded to increase awareness of its purpose and raise its profile among the general public.

"Since 1956, the Foundation has been known by lawyers and those in the legal system as the trusted steward of IOTA collections and as a funder committed to increasing access to the civil justice system," Murray Silverstein, FFLA president, said. "Now, we begin our work to educate those outside of the legal community about our mission, the critical need for legal aid funding, and the valuable economic impact of accessible, free legal counsel."

FFLA funds a network of more than 35 legal aid organizations that help people of limited means. When issues like eviction, domestic violence protection, identity theft, and healthcare benefits are resolved, lives are stabilized.

Each year, approximately two million people benefit either directly or indirectly because FFLA grants enable qualified legal aid programs to employ lawyers and staff that provide free civil legal services to people who cannot afford to hire a lawyer.

"Though our name has changed, our mission, staff, board members and operations remain the same," Silverstein said. "Funding Florida Legal Aid succinctly describes what we do, making it easier for everyone to understand the role we play."



FFLA President Murray B. Silverstein's term began July 1. A partner in the newly-opened Tampa office of Stinson LLP, he practices in the areas of unfair competition, trade secrets, intellectual property and health care litigation. He earned both his bachelor's and law degrees from Stetson University. Silverstein served for eight years on The Florida Bar Board of Governors and chaired The Florida Bar Rules of General Practice and Judicial Administration Committee. He also led committees of the Florida Courts Technology Commission. He was honored with The Florida Bar President's Award of Merit in 2010 and The Florida Bar President's Pro Bono Service Award in 2011. In 2006, he received the William Reece Smith Jr. Public Service Award.

FFLA is off and rolling! In December, we distributed more than \$33 million in IOTA funds to 35 legal aid providers. Undoubtedly, this funding gives more low-income Floridians a greater chance to address and resolve their legal needs.

Right now, FFLA staff are finalizing an IOTA Distribution final report template. The 34 qualified grantee organizations that received this funding for the 2023 calendar year are required to report on the use of those funds and certify their compliance with the IOTA rule. Our report template is designed to gauge the actual work and results achieved using these funds. Once received, FFLA staff will review and summarize the information and data provided, including the detailed metrics and performance outcomes required by Florida's Supreme Court. This will also allow us to better assess the impact of the amended rule.

Recently, FFLA added Westlaw Precision with AI-Assisted Research to our statewide subscription that provides legal research tools to grantees at a fraction of the regular cost. Better technology tools provide clients with better value and service, and we are proud to make this available to our legal aid partners. Read more about this on page three.

If you or someone you know is looking for a job in legal aid, check out FundingFLA.org/florida-legal-aid-jobs, which compiles and posts legal aid job openings across the state.

Finally, check out page seven for photos of our wonderful housewarming event in December.

Murray B. Silverstein

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FFLA distributes \$33.8 million in IOTA funds

On Dec. 8, 2023, the board of directors of FFLA approved the distribution of \$33,870,910 of Interest on Trust Accounts (IOTA) funds to 35 Florida legal aid organizations.

"FFLA is pleased to announce that our grantees will benefit greatly from IOTA funding that has grown to four times more than last year's funding under the 2023 amended IOTA rule," Murray Silverstein, FFLA president, said.

"These IOTA grants will enable qualified legal aid providers to serve more clients, pay their legal aid staff salaries commensurate with their experience and increase the availability of pro bono lawyers."

FFLA collected \$45,547,391 in IOTA cash collections during fiscal year 2022-23, its second year after the 2021 Bar rule amendment. \$23,343,795 in accrued interest was added to the collections.

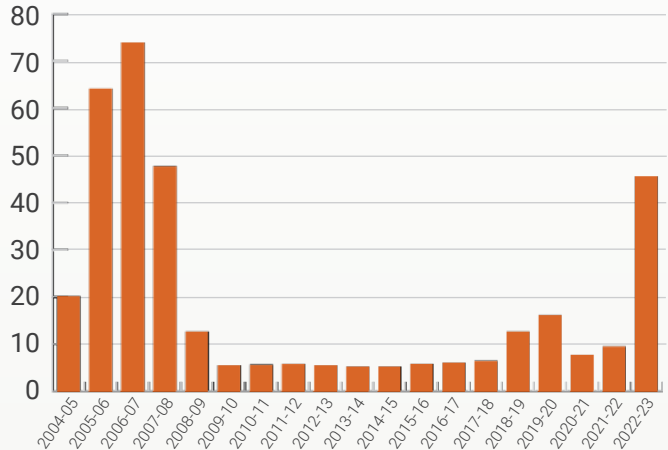
Under Bar Rule 5.1-1(g), FFLA distributes no less than 85% of IOTA funds collected in its fiscal year no later than six months after the end of its fiscal year. FFLA's fiscal year runs July 1 to June 30.

In October, \$3,687,158 of IOTA funds were distributed to 20 qualified grantee organizations for pro bono support and enhancement. An additional \$712,162 was used for the Loan Repayment Assistance Program, and \$800,900 was used to

partially fund Children's Legal Services grants.

A list of grantees and grant amounts is on page five.

IOTA Collections in Millions



With a decade-long global recession beginning in 2007 and a pandemic in 2020, the U.S. Federal Reserve instituted monetary policies that held the Federal funds rate near zero for many years. This had a devastating impact on IOTA revenue. The recently amended IOTA rule and an increased Federal funds rate have allowed FFLA to fund legal aid at levels not seen since 2007.

FFLA provides AI-Assisted Research tool to grantees

FFLA has added Westlaw Precision with AI-Assisted Research to its statewide subscription that provides legal research tools to its grantees. FFLA's subscription allows more than 20 Florida legal aid organizations to access Westlaw's many tools at a reduced rate.

Westlaw, an online legal database platform, provides case histories, form builders and research tools for lawyers. As the account holder, FFLA manages payment to Westlaw and is reimbursed by each legal aid provider. FFLA's investment in Westlaw reduces the cost of it for legal aid providers, allowing them to put more funds toward other services.

The Florida Bar Foundation was one of the first statewide IOTA programs in the nation to facilitate this type of agreement more than 20 years ago. FFLA believes legal aid clients benefit from having lawyers who have access to cutting edge research tools.

According to Thompson Reuters, which owns Westlaw, their AI-Assisted Research tool uses reliable information from its

library of materials, which reduces the risk of AI-generated hallucinations, or faulty information.

FFLA is committed to exploring projects that promote complementary, not competing, technology tools that can coordinate efforts, avoid redundancy, reduce costs and share best practices.



December board of directors report

The FFLA board of directors met in Winter Park, Fla., on Dec. 8, 2023, at the Winter Park campus of Valencia College. Prior to the meeting, presentations were made by Silvia McLain, executive director of Seminole County Bar Association Legal Aid Society, and Robert L. Johnson Jr., executive director of Brevard County Legal Aid. Both presentations focused on the history and work of their respective organizations and the populations they each serve. The board is grateful for Ms. McLain's and Mr. Johnson's presentations and the work they do.

The major actions of the board and reports received included:

FFLA Officers Elected

Pursuant to its Articles of Incorporation and Bylaws, the Nominating Committee of FFLA presented, and the board elected, the following officer nominees for a term beginning July 1, 2024, and concluding June 30, 2025:

President: Roberto R. Pardo, Esq.
 President-elect: Ashley N. Sybesma, Esq.
 First Vice President: Maria C. Gonzalez, Esq.
 Second Vice President: Hon. Hugh A. Carithers Jr.
 Immediate Past President: Murray B. Silverstein, Esq.

Report of the Grants Committee

The board approved \$33,870,910 for FY 2023-24 IOTA Funds Distribution grants to 35 qualified grantee organizations (see page 5). These grants are in addition to previous IOTA distributions for calendar year 2023 Loan Repayment Assistance Program (LRAP) loans (\$712,162), Children's Legal Services grants (\$800,900) and Pro Bono Support and Enhancement grants (\$3,687,158).

Total IOTA distributions equaled \$39,071,130, which is 85.7% of the \$45,547,391 in total IOTA collections received by FFLA in FY 22-23.

Additionally, the Grants Committee recommended, and the board approved, St. Michael's Legal Center for Women and Children as a qualified grantee organization eligible to receive IOTA funding.

For FY 23-24 LRAP payments, the Grants Committee recommended and the board approved funding 154 loan applications totaling \$760,393. The average amount of law school student loan debt for the applicants is \$152,208. As such, an LRAP ad hoc committee was created by President Silverstein to study and consider whether an increase in the principal loan amount for annual LRAP loans is in order. Retired Justice Peggy A. Quince was appointed as chair.

Work on a proposed IOTA Collections Spending and Reserve Policy continues

IOTA Collections Spending and Reserve Policy Task Force Chair Jim Schwarz reported that work continues on the

preparation of a proposed policy. The policy is intended to provide greater economic stability to FFLA's qualified grantee organizations and instill a more consistent and predictable IOTA distribution process. It will also modulate spending and provide greater transparency and more notice of expected IOTA distributions from FFLA allowing grantees more time for planning, building infrastructure and budgeting. Mr. Schwarz reported that the task force anticipates that it will have a proposed policy ready for review at the Executive Committee's Jan. 31 meeting.

Presentation and Review of Audited Financial Statements set for January 31, 2024

Audit Committee Chair Steve Salzer reported that FFLA's and The Florida Bar Foundation Endowment's Audited Financial Statements are expected to be completed by Jan. 31. Heather Mosier, a partner with Carr Riggs & Ingram CPAs, was present to answer questions and comment on the proposed schedule for completion.

Executive Director Report

Donny MacKenzie provided a short report on FFLA's updated schedule of insurance coverage and its housewarming event. He reported that approximately 75 people toured FFLA's new offices, new FFLA signage was unveiled, a Legacy Garden was dedicated and a tree was ceremonially planted in honor of the late Alan B. Bookman, former Florida Bar president and beloved husband of Connie Bookman, former president of The Florida Bar Foundation.

In addition, the housewarming included the playing of a Public Service Announcement prepared by Gary Yordon of Zachary Productions for FFLA. The PSA was replayed at the board meeting and can be found on FFLA's YouTube channel (@FundingFLA). Mr. MacKenzie then yielded the floor to Jessica Brown, FFLA's Communications Director, who gave an overview of FFLA's name and brand standards.

Next Meeting

The Board's next scheduled meeting will be on March 21, 2024, in Tampa, Fla. Former Medal of Honor Winner Hon. E.J. Salcines Jr. is hosting and coordinating the event, for which FFLA is most grateful.

ON OUR WEBSITE

- Past board reports
- Annual Reports
- Past newsletters
- Donor lists
- Financial statements
- Press releases

FUNDINGFLA.ORG

FFLA awards 2023 IOTA collections



Recent donations benefit FFLA

Cy Pres Award

FFLA received a cy pres award of \$392,549 from a recent class action settlement with unclaimed and residual funds. Plaintiffs' lawyers John Yanchunis and Ryan McGee of Morgan & Morgan facilitated the cy pres award.

2023 End of Year Giving Campaign

More than 161 donors contributed to FFLA's end-of-year giving campaign, which featured a story about single mother

who obtained a divorce from her abusive husband with the help of legal aid. As of January, \$63,859 have been donated.

Legacy Bricks

FFLA is filling our Legacy Garden with bricks that honor and memorialize loved ones. To date, donors have purchased 25 bricks, contributing more than \$7,000 to FFLA. Bricks are available at FundingFLA.org/housewarming in 4x8 and 8x8 sizes.

Ways to Make a Donation



PLANNED GIVING

Give gifts from a will or trust, life insurance, charitable remainder trusts, IRA charitable rollovers, charitable gift annuities and more.



GENERAL DONATION

Donate by cash, check or credit card to support FFLA's areas of greatest need.

TRIBUTE & MEMORIAL GIFTS

Honor the exceptional, celebrate the occasion and recognize the significant people in your life with a charitable gift to FFLA, or a brick in our Legacy Garden.



CY PRES AWARDS

Advocate for unclaimed class action funds being designated to FFLA as charitable donations.

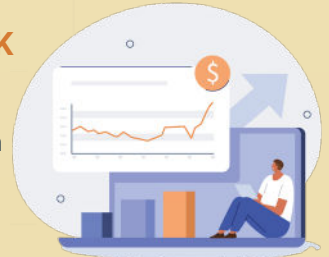


AWARD CEREMONY SPONSORSHIP

Sponsor an award that recognizes contributions made by legal aid lawyers and others at our annual event.

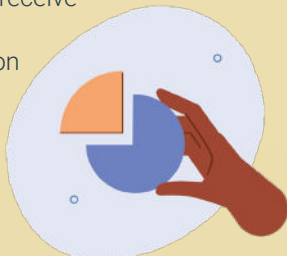
GIFTS OF STOCK

Donate appreciated securities, including stocks or bonds, as an easy and tax-effective way to support FFLA.



WORKERS' COMPENSATION

Donate dividends you receive from The Florida Bar's Workers' Compensation Member Benefit.



FFLA FELLOWS

Become a core supporter by pledging \$1,000 to FFLA's endowment.

For more information, questions about ways to give, or to make a donation, visit FundingFLA.org or contact Development Director Michelle Fonseca at 407-960-7000 or mfonseca@FundingFLA.org.

FFLA hosts housewarming, dedicates Legacy Garden

FFLA held a housewarming event on December 7, 2023, to officially announce its new name, welcome guests to its new office and dedicate its Legacy Garden.

During the event, a memorial tree was planted in FFLA's Legacy Garden in honor of the late Alan B. Bookman, former Florida Bar President and spouse of former Foundation President Connie Bookman. Former Florida Bar President Miles McGrane and his wife Patty were the Housewarming Signature Sponsors.

Reception Sign Sponsors Judge Emerson R. Thompson, a former Foundation president, and Sen. Geraldine F. Thompson and Foyer Sign Sponsors Jim Schwarz and Trisha Meili unveiled FFLA's new office signs.

If you would like to purchase a brick to be placed in FFLA's Legacy Garden as seen below, visit FundingFLA.org/housewarming.



Left to right, clockwise from top: Connie Bookman and Miles McGrane; FFLA President Murray Silverstein, Development Director Michelle Fonseca, Board Member Robert Murphy, Executive Director Donny MacKenzie; Memorial tree in honor of Alan B. Bookman; Jim Schwarz and Trisha Meili; Sen. Geraldine F. Thompson and Judge Emerson R. Thompson.



SAVE THE DATE

THURSDAY, JUNE 20, 2024



Join us for our annual award ceremony and breakfast as we recognize the winners of the Medal of Honor, Goldstein - Van Nortwick Award, Curran Award and more.

Scan QR code for sponsorships, tickets and more.

2024 Award Ceremony & BREAKFAST

FFLA
FUNDING FLORIDA LEGAL AID



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Mission

To increase access
to the justice system
for people of limited means,
FFLA funds legal services,
develops innovative tools
and programs, and supports
legal aid providers
and the courts.

www.FundingFLA.org

CONTACT FFLA
(407) 960-7000



Without access, there can be no justice.

Legal aid helped Stephanie, a survivor of domestic abuse, obtain a divorce and get custody of her two young daughters. Your donation helps mothers like Stephanie protect their children and end cycles of abuse. We count on your support to fund critical legal aid. Please consider a gift today.

www.FundingFLA.org/give



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The Florida Bar Foundation's new name is FFLA! Though our name has changed, our mission, staff, board members and operations remain the same. We are rebranding to increase awareness and educate those outside of the legal community about the acute need for legal aid funding and the valuable economic impact of accessible, free legal counsel.

