

SPEAKING OF JUSTICE

NEWS FROM THE FLORIDA BAR FOUNDATION
Volume 14 Issue no. 3



Florida Lawyers Mutual director Jack Harkness, left, presents the Medal of Honor for a Lawyer to John Patterson at The Florida Bar Foundation's 2022 Award Ceremony and Breakfast in June. Florida Lawyers Mutual sponsored the award.

Sarasota lawyer John Patterson wins 2022 Medal of Honor for a Lawyer

Sarasota lawyer and former Florida Bar Foundation president John C. Patterson Jr. was awarded The Florida Bar Foundation's 2022 Medal of Honor for a Lawyer, the Foundation's highest honor, in June. Patterson, a partner with Shutts & Bowen LLP in Sarasota, was honored for his career-long dedication to increasing local and

statewide access to justice for all, his altruistic pro bono efforts, his service in leadership, and his devotion to educating others on the importance of equal access to justice.

"It is clear that John's motivation is truly altruistic," wrote Linda Harradine, CEO of Legal Aid of Manasota, in her nomination of Patterson. "It isn't about the prestige of having

his name on the letterhead, or in an article, or for the purpose of being recognized. He is a quiet force for good who is always working in the forefront, as well as behind the scenes, to improve the legal profession and the lives of those less fortunate. In the process, he has made significant connections all over the state; has earned the respect of countless people;

Message from the President

Hon. Suzanne Van Wyk

Charity Navigator rating

IOTA implementation

New staff



I am honored to serve as the Foundation's president for 2022-2023 and look forward to a productive and constructive year. The Foundation has so much to be grateful for and we are hard at work implementing changes to many aspects of the Foundation's operations.

We are proud to announce that the Foundation received in July a four-star rating from Charity Navigator. This is a testament to the stewardship of the Foundation's assets and the Foundation's commitment to fair and efficient operation. Read more about the Charity Navigator rating on page 10.

I am excited to announce that the Foundation is returning to in-person board meetings, and we look forward to welcoming grantees, volunteers, and other interested persons who attend. In an effort to reduce expenses, we are returning to sponsorship of our quarterly meetings by law firms and other supporters. This significantly reduces the Foundation's costs for meeting space, IT support, and meals. In addition to reducing costs, this allows the Foundation to meet in communities around the state.

Rather than asking grantee representatives, volunteers, and other interested supporters to travel to Orlando for our quarterly meetings, we can "meet you where you are."

We are well on our way to implementing the amended IOTA rule, having commenced with a trial run – using Foundation reserves, not IOTA collections – with distribution to grantees in September. Staff spent many hours analyzing the fairest and most effective way to distribute IOTA funds, and solicited and received input from grantees.

The result was a prototype methodology that was tested during the trial run. Over the next few months, we will evaluate that process and solicit more input from grantees and other stakeholders on the

trial run, as well as the objective standards used to develop the fair distribution plan. We will use the results and feedback to make any needed adjustments for our first "real-time" IOTA distribution, scheduled for December of this year.

Another change includes welcoming new personnel to the Foundation. In June, we said goodbye to long-time grants administrator Andrea Horne and IOTA remittance specialist Lizzie Tracy. We welcome Jordan Hopkins, the Foundation's new grants administrator; Summer Roberts, the new IOTA distribution and reporting manager; and Peter Balgobin, the new IOTA remittance specialist. Please extend a warm welcome should you meet them.

The Foundation's role as a steward of funding for legal aid and legal services drives us to seek out changes to reduce expenses and operate more efficiently. One of those changes was the move from an annual awards dinner during the 2022 Florida Bar Annual Convention to a breakfast award ceremony. The event included a pinning ceremony to recognize our past and new Medal of Honor award winners. We thank the Honorable Emiliano Jose "E. J." Salcines, past Medal of Honor recipient, for the idea, and we hope to make this event a new tradition to annually recognize superstars in service to Florida's most vulnerable residents, while reducing our expenses to do so.

A handwritten signature in blue ink that reads "Suzanne Van Wyk". The script is fluid and cursive.

Hon. Suzanne Van Wyk, President

Florida Bar Foundation President Suzanne Van Wyk began her term July 1, 2022. Van Wyk is an administrative law judge with the Florida Division of Administrative Hearings in Tallahassee. A graduate of Florida State University College of Law, she also has a master's degree in urban and regional planning. Previously, Van Wyk was a shareholder with Bryant Miller Olive, served as assistant general counsel to the Florida Department of Community Affairs, as assistant county attorney with the Leon County Attorney's Office, and as a staff attorney for the Florida Building Commission and the Florida Senate Committee on Community Affairs. She is board certified in City, County, and Local Government Law. Van Wyk, a Florida Bar Foundation Fellow and Bronze Society donor, is currently serving as chair-elect of The Florida Bar's Administrative Law Section, and previously served on the Committee on Professionalism and chaired the Voluntary Bar Liaison Committee. She is also a past president of the board of the Florida State University College of Law Alumni Association.

New members join Foundation board of directors July 1



Hon. Stefanie C. Moon, Director, 2022-25
Moon presides in the 17th Judicial Circuit of Florida in the Unified Family Court Domestic Violence division. She previously worked as a sole practitioner specializing in business litigation and white-collar criminal defense.



Craig Waters, Director, 2022-25
Waters recently retired as the Florida Supreme Court's communications director. He won the 2022 Pete Weitzel/Friend of the First Amendment Award in recognition of his groundbreaking use of internet and video technology in the courts.



Robert W. Murphy, Director, 2022-25
Murphy practices consumer litigation in Ft. Lauderdale. Since 2001, he has been a member of The Florida Bar's Consumer Protection Law Committee and served as its chair from 2004 to 2006.



F. Scott Westheimer, Designated Director, 2022-23
Westheimer is president-elect of The Florida Bar. He is a managing partner at Syrett Meshad, P.A., in Sarasota, where he primarily represents plaintiffs in personal injury and commercial litigation.

The Foundation has six designated directors, including the president of Florida Legal Services, the president, president-elect and immediate past president of The Florida Bar, and two judicial officers. At-large directors and public members serve a maximum of two three-year terms, with one-third selected by the Florida Supreme Court, one-third by The Florida Bar Board of Governors and one-third by the Foundation board.

Directors awards grants, oversee the fundraising program, set investment and Foundation policies generally, and adopt the annual operating budget.

The board of directors can be contacted at BoardofDirectors@TheFloridaBarFoundation.org.

Foundation purchases office building in Maitland

The Florida Bar Foundation closed on the purchase of a 4,200 sq. ft. building in Maitland on July 15. The building will house the Foundation's operations and staff.

In 2019, a board committee began researching the cost effectiveness of owning a building rather than paying rent for office space. After determining there would be significant savings of more than \$3 million over 25 years, the board approved the purchase of a building located at 175 Lookout Place.

The Foundation will not have a mortgage, having purchased the property paying cash out of funds allocated for a building purchase. The Foundation entered into a two-year lease for the top floor, which effectively offsets all of the costs associated with occupying and maintaining the property during that time.



175 Lookout Place, new home of The Florida Bar Foundation

June board of directors meeting report

The Florida Bar Foundation board of directors met in person in Orlando on June 23, 2022. The major actions of the board and reports received included:

Adoption of FY 2022-23 Operating Budget

The board adopted the recommendation of the Budget and Finance Committee and approved the Foundation’s FY 22-23 operating budget in the total amount of \$2,509,775. This amount is 2.7% below last year’s operating budget. In addition, the Foundation’s projected actual expenses for FY 21-22 are expected to be about 16.74% (or \$359,920) less than last year’s budget primarily due to the pandemic, timing, and reduced costs associated with personnel and program related activities.

A detailed overview of the Foundation’s operating budget was contained in the board materials and is available for review upon request. In addition, staff is available to answer any questions or provide further documentation or backup as requested.

Board awards five sets of grants and awards

Children’s Legal Services (CLS) grants were awarded to nine applicants. Funding allocated by the board for FY 2021-22 CLS grants was \$1,000,000. Ten applications seeking \$1,031,055 were received. The applications were initially reviewed and independently scored by staff and two directors (the workgroup).

The unanimous decision of the workgroup

was to fund nine projects in the full amounts requested, resulting in an aggregate total of \$994,483. The group decided that this was the best approach because it awards nine projects the full amounts each requested (something the Foundation has not been able to do frequently in recent years given its depleted resources).

As such, the working group recommended, and the board approved, funding nine projects (see page 7).

A special thank you to directors Steve Salzer and Dr. Patty Babcock, and staff Jessica Brown, Summer Roberts and Andrea De Voe, who volunteered considerable time to carefully review and thoughtfully consider all applications individually and collectively resulting in the funding recommendation.

Funding allocated by the board for FY 2021-22 **Law School Civil Clinic** grants was \$250,000. Three applications seeking \$259,312 in funding were received and scored. The Board approved funding the three projects (see chart below).

The board on December 17, 2021, allocated \$880,000 for an additional round of **CED grant extensions**. As a result, a survey was sent on March 24, 2022, to all grantees who had previously indicated that their CED projects were ongoing. The survey sought specific information related to those CED projects for the purpose of possible continued funding.

Thirteen projects responded to the survey seeking \$1,622,539, which was 184% of the funding amount available. In an effort

to increase available funding, two carryover requests totaling \$84,733 were added to the grant allocation increasing the total amount to \$964,733.

As usual, this was a difficult and time-consuming task. Several worksheets were developed and reviewed and eight alternatives for funding CED grants extensions were explored. The Grants committee recommended, and the board approved, extended funding for nine programs (see page 7).

Also on December 17, 2021, the board approved a \$250,000 allocation for FY 2021-22 dedicated to **Technology and Training**. The allocation was primarily directed to the disposition of technology assets acquired from FJTC as reflected in the Board’s September 10, 2021, adoption of a Long-Range Plan which was preceded by the board’s March 12, 2021, approval of the Technology Committee’s Asset Recommendations.

The board approved the transfer of several technology assets with certain provisos discussed in detail in the board materials, which are available for review upon request. \$69,090 was approved for funding the transfer of certain assets. Pursuant to the Grants Committee request, the Board deferred funding for training for future consideration. The Board will explore funding for training using other mechanisms or methods.

For FY 2021-22, the Board allocated \$1,250,000 of its previous reserves for an **IOTA Trial Run**, with the purpose of refining the implementation work plan developed by

see [REPORT](#), p. 6

2022-23 Law School Civil Clinic grants awarded

Law school clinical programs involve law students in the provision of community-based civil legal assistance with a focus on economic development in impoverished local communities, providing an in-depth educational experience in representing the poor and working with individual clients and client groups in civil matters, and encouraging law students to pursue public interest careers or pro bono representation.

Program	Clinic	Grant
Florida State University College of Law Public Interest Law Center	Farmworker and Immigration Rights Clinic	\$125,000
Nova Southeastern University Shepard Broad College of Law	Veterans Law Clinic	\$75,000
University of Miami School of Law	Immigration Clinic Detention Project	\$50,000
		Total: \$250,000

Foundation begins IOTA collections under amended rule, conducts trial run

The Florida Bar Foundation has collected \$9,498,804.89 in Interest on Trust Accounts (IOTA) collections during its first fiscal year under the amended Rule 5.1-1(g)(8) Rules Regulating The Florida Bar.

In accordance with the rule, the Foundation will, on or before Dec. 31, 2022, distribute to one or more qualified grantee organizations all IOTA funds collected during fiscal year 2021-22 except for direct expenses required to

administer the IOTA funds, funds required to fund the Loan Repayment Assistance Program, and an additional reserve amount if requested by the Foundation and approved by the Florida Supreme Court.

"The Foundation's board members and staff continue to work diligently to implement the amended rule as efficiently, effectively and fairly as possible," Hon. Suzanne Van Wyk, the Foundation's president, said.

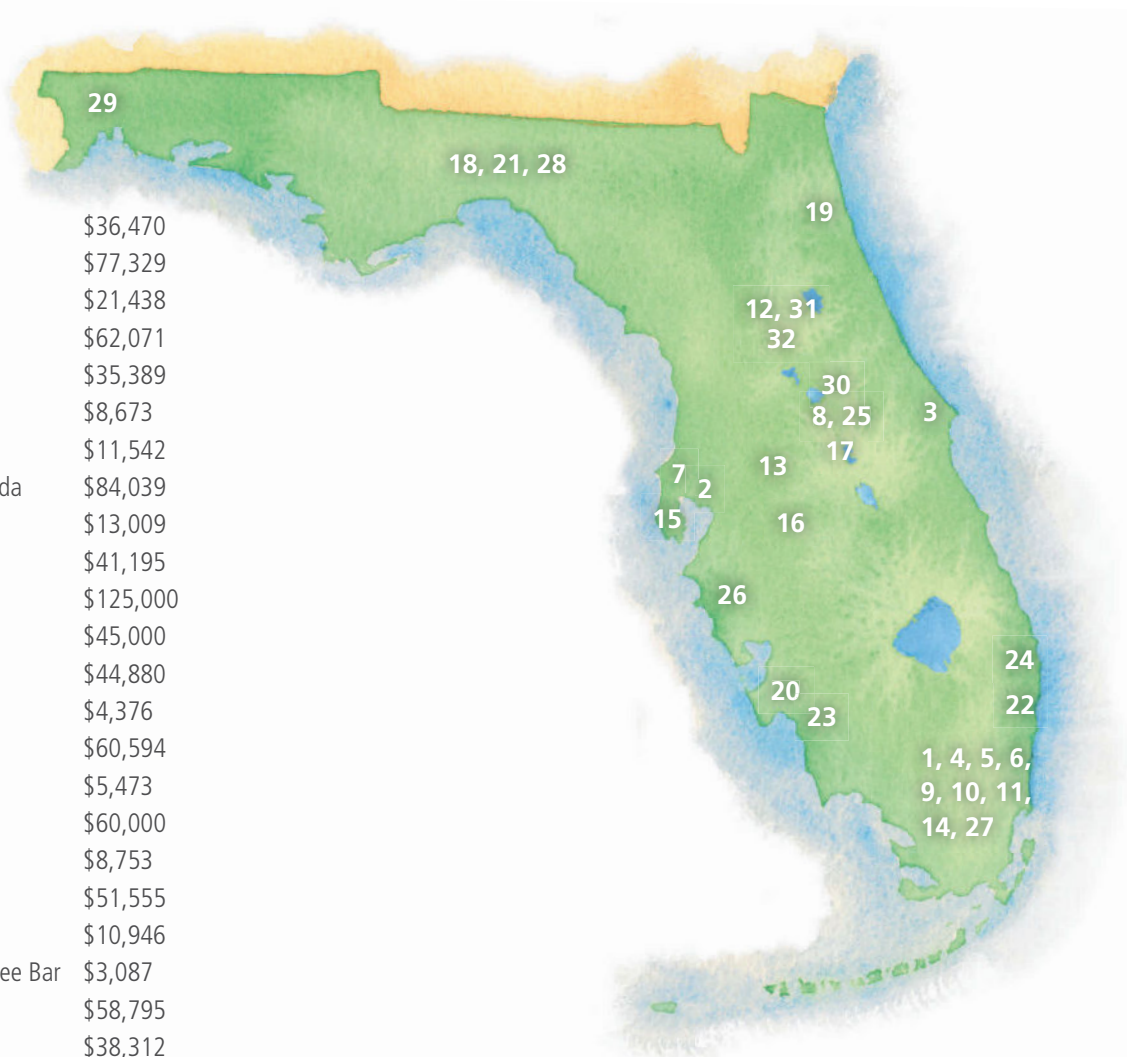
The Foundation created an initial

workplan to implement the amended rule. The workplan includes a matrix that calculates how IOTA funds will be distributed to qualified grantee organizations.

The Foundation is currently conducting a grant distribution trial run using the matrix to determine its effectiveness. Using \$1,250,000 set aside for the trial, the Foundation distributed trial run grants to 32 qualified legal aid organizations in August.

IOTA Trial Run Grant Recipients

1. Americans for Immigrant Justice	\$36,470
2. Bay Area Legal Services	\$77,329
3. Brevard County Legal Aid	\$21,438
4. Catholic Legal Services	\$62,071
5. Coast to Coast Legal Aid	\$35,389
6. Community Justice Project	\$8,673
7. Community Law Program	\$11,542
8. Community Legal Services of Mid-Florida	\$84,039
9. CABA Pro Bono	\$13,009
10. Dade Legal Aid	\$41,195
11. Florida Justice Institute	\$125,000
12. Florida Legal Services	\$45,000
13. Florida Rural Legal Services	\$44,880
14. Florida's Children First	\$4,376
15. Gulfcoast Legal Services	\$60,594
16. Heart of Florida Legal Aid Society	\$5,473
17. IDignity	\$60,000
18. Innocence Project of Florida	\$8,753
19. Jacksonville Area Legal Aid	\$51,555
20. Lee County Legal Aid Society	\$10,946
21. Legal Aid Foundation of the Tallahassee Bar	\$3,087
22. Legal Aid Service of Broward County	\$58,795
23. Legal Aid Service of Collier County	\$38,312
24. Legal Aid Society of Palm Beach County	\$80,730
25. Legal Aid Society of the Orange County Bar	\$85,754
26. Legal Aid of Manasota	\$14,427
27. Legal Services of Greater Miami	\$35,523
28. Legal Services of North Florida	\$51,864
29. Northwest Florida Legal Services	\$12,349
30. Seminole County Bar Assoc. Legal Aid Society	\$17,151
31. Southern Legal Counsel	\$17,506
32. Three Rivers Legal Services	\$39,771



The Foundation's approach provides funding in a more local manner (based on Legal Services Corporation regions) and for a larger population in need (including those under poverty level and the working poor). Funding is also based on legal aid provider capacity rather than other variable or subjective metrics. Funding is also weighted to reflect need and/or dependence on Foundation funding and to promote overall sustainability of the existing network.

the Executive Committee Special Committee which was approved by the Board in November 2021. Input from the Foundation's grantees was solicited numerous times throughout the process and the grantees are commended for their active participation and extensive input. Such input included narratives, reports, data points, survey responses received individually and collectively, direct communications with groups and individuals, and various references and citations. Input from board members and other IOLTA organizations was also received, and various research was conducted.

Consequently, a matrix was developed which was approved by the Board. This matrix reflects the starting point and basic construct for distributing IOTA funds going forward. The staff recommendation, which was approved by the Board, and corresponding worksheets are available for review upon request.

In sum, 32 legal aid providers located throughout the state and in all seven regions were funded using an approach that provided funding in a more local manner (regional) and for a larger population in need (poverty and working poor). The funding was further gauged on objective capacity rather than other metrics that may be variable or subjectively defined. Funding was also weighted to reflect need and/or dependence on Foundation funding and to promote overall sustainability of the existing network.

The Foundation will continue to research and seek input in preparation for its distribution of IOTA funds collected during FY 21-22 per the amended IOTA rule.

Board approves purchase of Foundation office building

In 2019, in an effort to cut future costs and expenses, the Board created a New Building Committee to explore locating real property that could be purchased by the Foundation. After an extensive search, the Building Committee, chaired by Stephen Senn, immediate past president, and with invaluable assistance from director Min Cho, located a suitable office building at 175 Lookout Place in Maitland, Fla. (See story, page 3.) The committee and staff were also authorized to

negotiate a contract subject to due diligence and specific approval by the board of directors. The Foundation then received pro bono legal assistance from Wiley Boston, Esq., to represent the Foundation in the transaction.

Mr. Senn reported on the status of the due diligence efforts and further reported that the contract for purchase also included an agreement to buy the building's customized furniture. It also included an agreement to lease the top floor of the 4,200 sq. ft. building for two years to the seller, along with a three-month lease for the bottom floor as well. The Foundation is endeavoring to sublet its existing lease whose term ends November 2023.

Mr. Senn further explained that the purchase of the building will result in an annual savings for the Foundation of at least \$76,451 in office expenses. During the first two years, while the top floor is leased, the savings should approach \$137,454 per year. Over a 25-year period, this will result in "rent" savings of \$3,780,197, which does not include the value of asset appreciation for the building itself.

The Board approved the New Building Committee's recommendation to proceed with the purchase subject to due diligence satisfactory to the New Building Committee and executive staff. The closing is scheduled for July 15. Special thanks are owed to Mr. Boston for his free legal services and exemplary work.

New auditor retained

Pursuant to the board's five-year audit review policy, the Audit Committee in September 2021 recommended the commencement of a five-year review. On December 17, 2021, an Audit RFP Ad Hoc Committee was convened by President Bookman and authorized to engage in an RFP proposal to consider a possible change in its current auditor. A request for proposal to 21 selected auditor firms was prepared and sent.

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 Board approved the retention of CRI as the Foundation's auditor going forward and thanked its previous auditor, BDO, for five years

of top-quality service to the Foundation.

Overall Review Ad Hoc Committee authorized to proceed

In connection with its ongoing work, the Overall Review Ad Hoc Committee recommended, and the board authorized, that it continue with its work consistent with its previously reported recommendations:

1. The Foundation's mission does not need to be and should not be changed;
2. The Foundation's mission statement should be changed and clarified;
3. The Foundation should adopt and use a fictitious name that better reflects its mission and purpose;
4. The Foundation should endeavor to change and refine its messaging; and
5. The Foundation should create, develop or refine its brand to reflect the changes above.

The committee is expected to present a first draft for approval in concept at the board's December 2022 meeting.

Passing of the Gavel and thanksgiving for service

The Honorable Suzanne Van Wyk received the president's gavel from outgoing President Connie Bookman. Judge Van Wyk's term as president began on July 1, 2022. She announced her committee assignments and dates for board meetings for FY 2022-23, which were ratified by the board.

President Bookman also recognized those members of the board and the Foundation Endowment Trust who were terming off and thanked them for their service and commitment. Those members are Lara Tibbals, Esq.; Greg Coleman, Esq.; Stephen Senn, Esq., immediate past president; Dori Foster-Morales, Esq., immediate past president of The Florida Bar; Judge Emerson Thompson, Endowment Trustee; and Samantha Vacciana, president of Florida Legal Services.

Next Meeting

The board's next scheduled meeting was set for September 9, 2022, in Ft. Lauderdale, Fla. Special thanks to Greenspoon Marder LLP and director Murray Silverstein for hosting the meeting.

2022-23 Children's Legal Services grants awarded

Children's Legal Services grants fund legal assistance to needy children in critical areas which affect their safety, well-being and future development. Grants help, but are not limited to, foster children, children seeking health benefits and children needing educational assistance.

Program	Project	Grant
Brevard County Legal Aid	Children's Legal Advocacy Project	\$60,000
Catholic Legal Services	Children Fleeing Violence	\$86,761
CABA Pro Bono Project	Immigrant Children's Program	\$150,000
Dade Legal Aid	Children's Legal Collaborative Project	\$125,000
Florida State University College of Law	Vulnerable Children Project	\$141,000
Lawyers for Children America	Every Lawyer (and Law Student) Can Make a Difference in a Child's Life	\$50,000
Legal Aid Society of the Orange County Bar Association	Mental Health and Crossover Youth: Securing Services and Specialized Placement	\$90,000
Legal Services of North Florida	Panhandle Children's Legal Advocacy Project	\$141,722
Southern Legal Counsel	Keep Kids in School Project	\$150,000
Total:		\$994,483

2022-23 Community Economic Development grants extended

Community Economic Development grants fund programs that provide services that revitalize or stabilize low- and moderate-income areas and address neighborhood blight resulting from problems facing communities including unemployment, poverty, job loss and environmental degradation.

Program	Project	Grant
Brevard County Legal Aid	Survivors of Domestic Violence Advocacy Project	\$80,000
CABA Pro Bono Project	Domestic Violence; Human Trafficking Victims Representation Program; etc.	\$80,000
Dade Legal Aid	South Dade Guardianship Project	\$80,000
Gulfcoast Legal Services	The Financial Stability Project	\$61,810
Jacksonville Area Legal Aid	Wealth Building Project	\$166,398
Legal Services of Greater Miami	Florida Community Development Legal Project	\$232,323
Seminole County Bar Association Legal Aid Society	John Hamilton Domestic Violence Prevention and Community Economic Project	\$72,000
Southern Legal Counsel	Economic Justice for the Homeless	\$132,200
Three Rivers Legal Services	Home Sweet Home Heirs Property Project	\$60,000
Total:		\$964,731

Family Law Section makes \$75,000 donation



During The Florida Bar Annual Convention in June, the Family Law Section presented a check for \$75,000 to the Foundation in support of children's legal services. The section has donated more to the Foundation than any other Bar section, totalling \$575,000 as of June 2022. "We're immensely proud of our partnership with The Florida Bar Foundation and we're deeply grateful for the support of our Section members who help make this possible, year after year," Heather L. Apicella, the section's immediate past chair, said.

and has made a lasting impact on the legal landscape."

Patterson, who earned his law degree from the University of Florida, served on The Florida Bar Board of Governors from 1995 to 1999. He was also appointed to the Second District Court of Appeal Nominating Committee and previously served on and chaired the Twelfth Judicial Circuit Nominating Commission. He is a past president of the Sarasota County Bar Association as well.

In 2004, he joined the board of The Florida Bar Foundation, ultimately becoming its president in 2013, a time of great uncertainty for the organization as it faced a financial crisis after more than a decade of near-zero interest rates and depleted reserves. Patterson was instrumental in negotiating a multi-million dollar bridge loan from The Florida Bar, securing the Foundation's future.

"John's steadfast, principled leadership of the Foundation guided his decisions when staff had to be reduced and funding to the grantees had to be slashed," Hon. Emerson R. Thompson Jr. said in a letter supporting

Patterson's nomination. "He explained each decision carefully and precisely and always stated why the decisions were made and why they were made to deliver the best service to clients. Not only is he a principled leader, he is a visionary."

Patterson currently serves as secretary of Innocence Project of Florida, general counsel of Girls Incorporated of Sarasota County, a director for the Sarasota Tiger Bay Club, an officer and director of The Kimberly Patterson Leukemia Research Fund and a director of Shands Teaching Hospital and Clinics.

"John is truly a shining example of what all attorneys should strive to accomplish throughout their careers," Scott Westheimer, a managing partner at Syrett Meshad, P.A., said in a letter of support for Patterson's nomination. "He has always selflessly advocated for access to the courts for all Floridians, supported legal aid organizations, and been committed to pro bono service."

Patterson also currently serves on the board of Legal Aid of Manasota, an organization he helped create 30 years ago. He continues to



Patterson, left, with Hon. Emerson R. Thompson Jr.

provide pro bono services there, most recently spending more than 50 hours to settle a highly contested property tax case for a low-income resident in Sarasota, saving the client's homestead in the process.

The Medal of Honor Award is presented each year to a member of The Florida Bar who has demonstrated his or her dedication to the objectives of The Florida 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."

Goldstein - Van Nortwick award winners recognized at ceremony

Community Law Program and Bay Area Legal Services won the Foundations's 2022 Goldstein - Van Nortwick Award for Excellence, a competitive award that recognizes significant impact work undertaken by a Foundation grantee.

Their project was a combined effort to expand access to free legal services for tenants impacted by COVID-19 who were at risk of eviction and homelessness.

The Pinellas Eviction Diversion Program was designed to provide holistic services to tenants in Pinellas County including free legal assistance, opportunities to mediate with landlords in a virtual setting using Zoom, expedited access to rental assistance and housing navigation, all within one location.

The project engaged in an aggressive and targeted outreach campaign both on the ground and via social media. It also engaged in

policy advocacy with Pinellas County to increase the efficiency of its emergency rental assistance program.

By the end of 2021, the project had served more than 1,000 tenant households. Seventy-two percent received extended services, resulting in them getting their past rent paid or remaining stably housed or gaining additional time to find alternate housing. Through formal mediation and informal negotiations, the project helped tenants access more than \$3 million in rental assistance. Fifty-six percent of those helped were persons of color.

In addition to these outcomes for individual



Tara Price, left, presents awards to Kimberly Rodgers of Community Law Program, middle, and Lisa Brody of Bay Area Legal Services, on behalf of award sponsor Shutts & Bowen LLP.

clients, Community Legal Program and Bay Area Legal Services collaborated with the Homeless Leadership Alliance, helping 84 tenant households find new housing without experiencing homelessness. Of this number,

Richard "Dick" C. Woltmann receives Curran Distinguished Service Award

Richard "Dick" C. Woltmann, president and CEO of Bay Area Legal Services, received the Foundation's 2022 Jane Elizabeth Curran Distinguished Service Award in June. Woltmann, who has led Bay Area Legal Services (BALS) since 1980, was honored for his four decades of being a staunch advocate and effectuating positive and lasting change by increasing access to civil justice for communities and underserved individuals, particularly seniors and veterans, in Florida and across the nation.

In his early days at BALS, Woltmann, who earned his law degree from the University of Florida, secured funding to create the Senior Advocacy Unit to provide services and legal representation to seniors facing obstacles like foreclosure, construction fraud, and unaffordable mortgage payments. He also worked to ensure access to justice for persons with AIDS, building partnerships with groups like the Tampa AIDS Network.

"Dick is a visionary and has approached his role as the leader of one of Florida's legal aid organizations as a true CEO - always looking out for opportunities and threats with an eye to capitalize on any potential opportunities and minimize or eliminate any perceived threats on the horizon," DLA Piper LLP partner Michael Bedke said in his nomination of Woltmann. "After four decades of selfless service to our less fortunate neighbors, Dick's commitment and efforts continue to effect positive and lasting change. He is as passionate today as he was in the early 80's when I first saw him

advocating for what is right."

When Woltmann realized the need for telephone legal assistance for Florida's seniors, he used funding from the Florida Department of Elder Affairs to create a hotline. More than 130,000 Floridians have received free legal assistance through the statewide Senior Legal Helpline.

Woltmann also facilitated a partnership with local law firms and volunteer attorneys to provide assistance to pro se litigants at the Hillsborough County Court House. The partnership culminated in one of the first "courthouse walk-in" projects in the nation. At the request of the federal judges, the project expanded into the Tampa federal courthouse. To date, the program has assisted more than 120,500 individuals with consumer debt, housing, guardianship, child support and more. Woltmann's vision has resulted in efficiencies that help unclog the judicial system while ensuring civil pro se litigants have their proverbial day in court.

Also under Woltmann's direction, BALS began providing on-site lawyers at The Spring of Tampa Bay, one of the oldest and largest domestic violence shelters in the country. Dick employed lessons learned from that



Richard "Dick" C. Woltmann, right, with Foundation past president Stephen R. Senn, whose firm, Peterson and Myers, sponsored the award.

partnership in the development of medical legal partnerships with Bay Pines VA Hospital and James A. Haley VA Hospital to provide free legal services to eligible veterans. Then, Woltmann worked with the United Way's Mission United Program, the Governor's "Forward March" initiative and with state Sen. Danny Burgess to obtain legislative funding for a statewide free legal helpline for veterans.

"There has never been a time in his life when he has not concentrated his energies on serving others," Judge Catherine Peek McEwen said in a letter to support Woltmann's nomination. "He took BALS from a solid little legal aid law firm to a sophisticated, large legal aid law firm dedicated to providing free civil legal services to low-income Tampa Bay area residents through traditional representation as well as innovative programs targeting discrete legal problems and client populations."

GOLDSTEIN, from p. 8

to date, 81 of the households remain stably housed.

The project's advocacy efforts led to a number of changes, including the county fast-tracking tenant applications that were in active eviction status, the removal of birth certificate documentation for minors in the household and allowing for utility payments to be made at the point of a tenant being 30 days past due, as opposed to waiting until a shut off notice has been issued. As a result, the

Pinellas Emergency Rental Assistance Program's processing time has been cut from an average of 60 days to 20 days.

The first runner-up of the award was Florida Health Justice Project for its Enforcing Medicaid Rights of Former Foster Youth Project. The project worked to reform, statewide, the Department of Children and Families' flawed eligibility determination process for young adults who, because they have aged out of foster care, remain eligible for Medicaid until their 26th birthday.

The second runner-up was Americans for Immigrant Justice's COVID in Immigration Detention litigation, which was an effort to obtain the release from ICE custody of immigrants, with the initial focus on persons with comorbidities for whom detention conditions threatened their lives on a daily basis, holding ICE accountable to its obligations under the CDC guidelines.

2022 Florida Bar Foundation Award Ceremony & Breakfast



Charity Navigator awards Foundation highest possible rating



The Florida Bar Foundation has received the highest possible rating, 4 stars, from Charity Navigator for exceeding industry standards and outperforming most charities. Since 2002, using objective analysis, Charity Navigator has awarded only the most fiscally responsible organizations a 4-star rating. In 2011, Charity Navigator added 17 metrics, focused on governance and ethical practices as well as measures of openness, to its ratings methodology. These Accountability & Transparency metrics, which account for 50 percent of a charity's overall rating, reveal which charities operate in accordance with industry best practices and whether they are open with their donors and stakeholders. Charity Navigator (www.charitynavigator.org) is the largest charity evaluator in the U.S., and its website attracts more visitors than all other charity rating groups combined.



Photos: 1. Hon. Emiliano Jose "EJ" Salcines, Hank Coxe, John Patterson, Kathy McLeroy, Jack Harkness, Dudley Goodlette; 2. Jesse Diner, Edith Osman, Adele Stone, Francisco Angones; 3. Donny MacKenzie, Hon. EJ Salcines, Stephen R. Senn; 4. Connie Bookman, Hank Coxe; 5. Ray Reid, Maria Gonzalez, Sara Courtney-Baigorry; 6. Robert W. Murphy, Brian Currie, Robin St. Denis, Donald St. Denis; 7. Leslie Powell-Boudreaux, Jeff Hearne, Ilenia Sanchez-Bryson, Darby Kerrigan Scott; 8. Katherine Woltmann, Joan Boles, Kathy McLeroy, Lisa Brody; 9. Aidan Browne, Brandon Williams, Angela Xu, Kimberly Rodgers, Raymond Blacklidge, Lindsey Jinright, Chrystal Lunsford, Mercy Roberg, Ted Starr; 10. Matthew Dietz, Marni Lennon; 11. Juliet Roulhac, Jake Schickel, Jack Harkness; 12. Richard "Dick" C. Woltmann, Sarah Lahlou-Amine, Hon. Catherine Peek McEwen.

Joseph "Jody" Hudgins receives President's Award

At the Foundation's June board of directors meeting, Foundation President Connie Bookman honored Joseph "Jody" Hudgins with the 2022 President's Award for his passionate dedication and innovative commitment to increasing access to Florida's justice system while promoting the principles of equal justice for all.

Hudgins began his term on The Florida Bar Foundation's board of directors in 2019 as a delegate for Florida Bar President John M. Stewart. He continued on the next term as Stewart's delegate, and again in 2021-22 for Florida Bar President Michael G. Tanner.

Hudgins, who was appointed to The Florida Bar Board of Governors as a public member in 2019, has been a banker for more than 40 years. He was the Chief Credit Officer of First Florida Integrity Bank in Naples.

In 2020, Hudgins proposed a rule amending rule 5-1.1 of the rules regulating The Florida Bar. The proposed rule, if passed, would establish a simplified framework for banks to pay interest rates on lawyers' trust accounts.

The rule is designed to provide more certainty in interest rate calculations for banks and the Foundation. It would also most likely increase IOTA revenues, which would allow the Foundation to award more grants.

The rule is currently pending before the Florida Supreme Court.

The award was sponsored by St. Denis & Davey.



Joseph "Jody" Hudgins

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