



WILLIAM L. THOMPSON, JR.
President
The Florida Bar Foundation
2002-03

The President's Message

I am pleased to report the Foundation's progress during 2002-03 in awarding grants of more than \$11.1 million. In that endeavor, it has been my great pleasure to work with the devoted and enthusiastic staff of the Foundation and the inspirational lawyers from Pensacola to Jacksonville to Tampa to Miami who have worked throughout the year to make the Foundation's grantmaking

so successful.

The chief beneficiary of our grantmaking continues to be Florida's network of dedicated civil legal assistance organizations operating in all 67 Florida counties. Whether through our general support and special purpose grants, 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 make 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.

I'm happy to report as well that gifts from lawyers through the *Lawyers' Challenge for Children* on the annual Florida Bar Fee Statement and from other donors have increased funding for 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 for children put into place to promote their growth into productive adults.

Again this year, the Foundation administered funds appropriated by the state under the Florida Access to Civil Legal Assistance Act. One and one-half million dollars were appropriated to continue pilot projects in seven judicial circuits. Although less than last year, this funding continues the partnership between the state and the thousands of Florida attorneys who give generously each year of their time and money to support legal services.

Another area of Foundation grantmaking 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 for local courts, bar associations and other groups to test ways to make the justice system more responsive. 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. For example, *Team Child*, a three-year demonstration project, showed that we can reduce juvenile recidivism when the public defender teams up with a legal services program to address basic family stability issues such as domestic violence, housing and public benefits, in addition to

just compensation due was zero. As a result, the Supreme Court found that the operation of the IOLTA program in Washington does not violate the Fifth Amendment. The decision, of course, also supports our IOTA program in Florida.

The continued decline in bank interest rates again prevented us from realizing a greater result from the 2001 IOTA rule amendments. The amendments require that financial institutions offering IOTA accounts pay the highest interest rate or dividend generally available to their similarly-situated non-IOTA account customers. The amendments also approved government money market accounts, in addition to sweep accounts and interest checking accounts, for IOTA funds. We are

... the Foundation is working to help make the promise of equal access to justice a reality in Florida.

focusing on the special needs of the child such as learning disabilities and access to health care.

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 about these programs is positive both in terms of the organizations served and the growing number of law students committed to using their legal skills to assist the less fortunate. Especially today, it is gratifying to see that law students increasingly understand a lawyer's responsibility to their community.

A real bright spot in the year was the victory for Interest on Lawyers Trust Accounts (IOLTA) programs in the United States Supreme Court. On March 26, 2003, the U.S. Supreme Court issued its decision in *Brown v. Legal Foundation of Washington*, upholding the constitutionality of IOLTA under the Just Compensation Clause of the Fifth Amendment. In its ruling, the Supreme Court held that even assuming the interest generated on IOLTA accounts amounted to a per se taking that taking was for a valid public use and the amount of

pleased, however, that a major brokerage firm has test marketed its new IOTA product and expects to roll it out statewide in 2004. In all, we are grateful that Florida financial institutions continue to work well with the Foundation to further the goals of the IOTA program.

Of course, lower interest rates have made our fundraising efforts more critical to maintaining stability in Foundation grants. This year saw a very successful recruiting campaign for Foundation Fellows in Tallahassee with more than \$198,000 in Fellows pledges added to the Foundation's Endowment, and 176 individuals becoming a Fellow with a \$1,000 pledge payable over five years. So, when a Foundation director or other volunteer asks you to become a Foundation Fellow or support our mission in other ways, I ask you to say yes.

WILLIAM L. THOMPSON
President, 2002-03

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The Florida Bar Foundation Mission Statement

The mission of The Florida Bar Foundation, a philanthropic organization established in 1956 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:

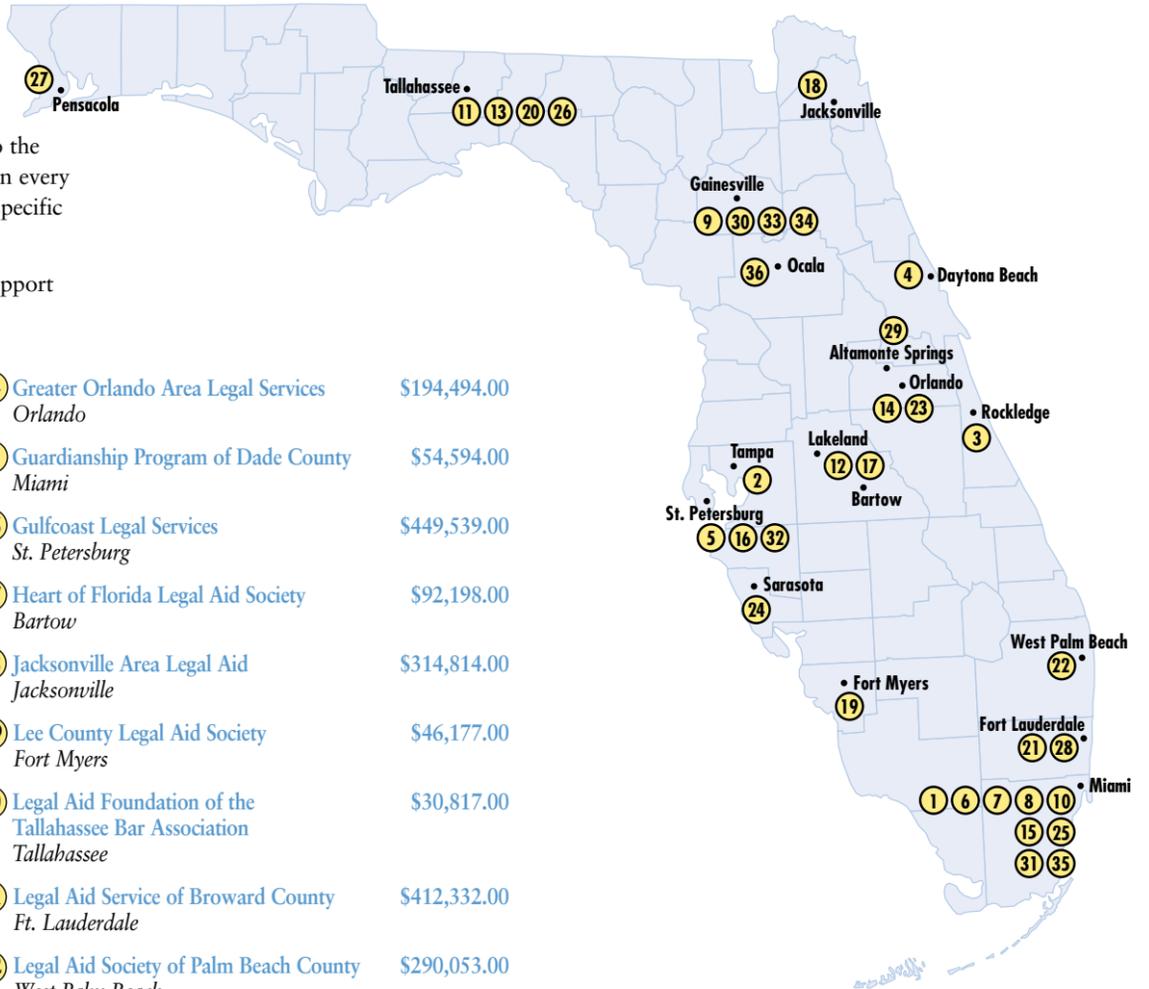
- Expand and improve representation and advocacy on behalf of low-income persons in civil legal matters;
- Improve the fair and effective administration of justice; and
- Promote service to the public by members of the legal profession by making public service an integral component of the law school experience.

Grants for Legal Assistance for the Poor

The Foundation's Legal Assistance for the Poor

(LAP) grant program, supported primarily by IOTA funds, provides general support and special purpose 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 2002-03, the Foundation awarded 36 grants in support of legal aid organizations serving every Florida County:



1 American Friends Service Committee Central American Political Asylum Program Miami	\$106,422.00	14 Greater Orlando Area Legal Services Orlando	\$194,494.00	31 St. Thomas University School of Law Immigrant Families Assistance Project Miami	\$2,500.00
2 Bay Area Legal Services Tampa	\$556,769.00	15 Guardianship Program of Dade County Miami	\$54,594.00	32 Stetson University College of Law Combined Civil Clinics St. Petersburg	\$2,500.00
3 Brevard County Legal Aid Rockledge	\$69,383.00	16 Gulfcoast Legal Services St. Petersburg	\$449,539.00	33 Three Rivers Legal Services Gainesville	\$297,535.00
4 Central Florida Legal Services Daytona Beach	\$420,762.00	17 Heart of Florida Legal Aid Society Bartow	\$92,198.00	34 University of Florida College of Law Virgil Hawkins Civil Clinic Gainesville	\$2,500.00
5 Community Law Program St. Petersburg	\$41,040.00	18 Jacksonville Area Legal Aid Jacksonville	\$314,814.00	35 University of Miami School of Law Children and Youth Law Clinic Miami	\$2,500.00
6 Cuban American Bar Association Pro Bono Project (Administered by Florida Immigrant Advocacy Center) Miami	\$27,297.00	19 Lee County Legal Aid Society Fort Myers	\$46,177.00	36 Withlacoochee Area Legal Services Ocala	\$237,593.00
7 Dade County Bar Association Office of Public Service-Volunteer Lawyers Miami	\$296,626.00	20 Legal Aid Foundation of the Tallahassee Bar Association Tallahassee	\$30,817.00	Total	\$9,540,097.00
8 Florida Immigrant Advocacy Center Miami	\$585,078.00	21 Legal Aid Service of Broward County Ft. Lauderdale	\$412,332.00		
9 Florida Institutional Legal Services Civil Legal Assistance Project Gainesville	\$297,126.00	22 Legal Aid Society of Palm Beach County West Palm Beach	\$290,053.00		
10 Florida Justice Institute Miami	\$223,231.00	23 Legal Aid Society of the Orange County Bar Association Orlando	\$381,722.00		
11 Florida Legal Services Tallahassee	\$1,415,000.00	24 Legal Aid Society of Manasota Sarasota	\$15,821.00		
Florida Legal Services Migrant Farmworker Justice Project Tallahassee	\$491,713.00	25 Legal Services of Greater Miami Miami	\$533,803.00		
12 Florida Rural Legal Services Lakeland	\$617,930.00	26 Legal Services of North Florida Tallahassee	\$406,015.00		
13 Florida State University College of Law Pro Bono Project Tallahassee	\$2,500.00	27 Northwest Florida Legal Services Pensacola	\$209,813.00		
		28 Nova Southeastern University/Shepard Broad Law Center Ft. Lauderdale	\$2,500.00		
		29 Seminole County Bar Association Legal Aid Society Altamonte Springs	\$52,076.00		
		30 Southern Legal Counsel Gainesville	\$192,324.00		

Foundation Legal Assistance for the Poor Grants Support a Wide Variety of Pro Bono Services by Members of The Florida Bar



Pro bono hours donated by members of The Florida Bar through organized pro bono programs in 2002 represented 17% of all cases — nearly 18,000 — closed by Foundation legal aid grantees. Foundation funds primarily support the intake and referral of cases to pro bono volunteer attorneys and to provide such volunteers with backup support and training.

While much of the time donated by pro bono attorneys was in family law cases, there is a wide variety of pro bono service opportunities for Florida attorneys. To name just a few:

- Transactional attorneys helping community groups develop affordable housing
- Handling small probate matters
- Representing children in dependency proceedings
- Co-counseling cases with legal aid attorneys in housing and consumer law and assisting particularly vulnerable clients, such as the elderly, the disabled and the mentally ill

And, not all pro bono work has to involve direct representation of clients. For example:

- Providing substantive law and skills training to legal aid attorneys
- Serving as mentors to less experienced legal aid attorneys
- Doing client intake
- Participating in community legal education programs such as being a panelist at a seminar on domestic violence or speaking to the elderly about protection of their homesteads

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 grantees to continue to expand the scope of pro bono opportunities they offer private attorneys in their communities.

How Legal Assistance Grantees Have Helped This Year

Family Matters: 37,483 Cases (36%)

A mother of three suffering from multiple sclerosis was abandoned by her husband who also refused to provide any financial support for her or their children. A social service agency from which she had sought financial help referred her to legal aid. Legal aid represented her in a dissolution of marriage proceeding in which the judge ordered that the father pay child support and alimony.

Legal Aid Society of Collier County

Housing Matters: 18,074 Cases (17%)

An elderly widow sought assistance from legal aid after being threatened with eviction by her homeowners' association for using an "illegal" wheelchair ramp. Legal aid filed a fair housing complaint and negotiated a settlement that ensured her right to stay in her home.

Florida Rural Legal Services

Individual Rights Matters: 16,043 Cases (15%)

A 41-year old immigrant fled his home country of Guatemala after being kidnapped, beaten and tortured because of his political activities. Legal aid advocated on his behalf before the Immigration and Naturalization Service, and he was granted asylum and the right to remain in the United States.

American Friends Service Committee

Consumer Matters: 8,832 Cases (8%)

Faced with foreclosure, an 84-year-old woman living on a small, fixed income came to legal aid for help. Several months earlier, she had been contacted by a contractor who advised her that a government program would pay for repairs to her home. After having her sign paperwork he did not explain, the contractor made costly and unnecessary repairs to her home which resulted in a \$32,000 mortgage she was unable to pay. Legal aid negotiated cancellation of the mortgage. The contractor was later prosecuted by the state of Florida.

Bay Area Legal Services

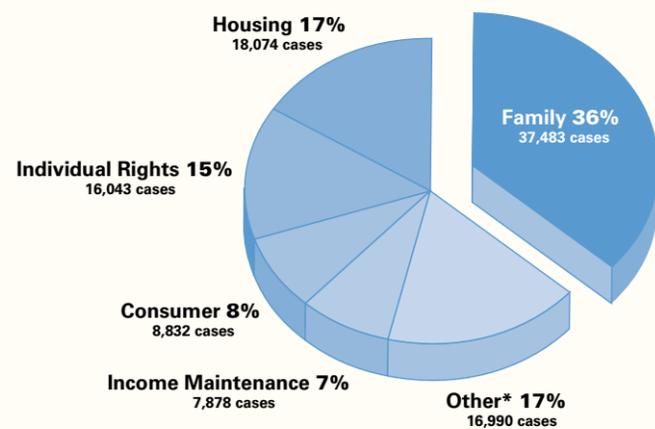
Income Maintenance Matters: 7,878 Cases (7%)

A woman's request for a car to help her move from welfare to work was denied by the local workforce board. Although cars and other supporting services were available, there was no formal application, review or appeals process. Two legal aid programs co-counseled and appealed the denial to an appellate court. The appeal led to the woman receiving a car and the state adopting a formal application process, and standards of review and denial policies which are in effect in Miami-Dade and Monroe counties for all people seeking assistance as they move from welfare to work.

Legal Services of Greater Miami, Florida Legal Services

TOTAL: 105,300 Cases

Percentage of Cases Handled in 2002



*Includes employment, health, children, education, etc.

Law School Loan Repayment Assistance Program

After surveying its legal assistance grantees, the Foundation re-established its Loan Repayment Assistance Program in 2002-03 to improve recruitment and retention of staff legal aid attorneys. The survey showed that a significant number of newly hired attorneys were leaving public service after just three years because of high student loan debt. The Foundation's Loan Repayment Assistance Program pays the legal aid attorneys up to 75% of the annual payments on their need-based law school debt for up to five years. Annual payments are capped at \$6,000 and are in the form of one-year loans forgiven annually for attorneys who remain employed full-time at a Foundation legal assistance grantee for the full 12-month period. In 2002-03, the Foundation committed \$189,171 to the Program for benefits to 49 staff legal aid attorneys. In selecting participants, the Foundation gave first priority to former Florida Legal Aid Advocates Fellows and second priority to attorneys in their second and third year of legal aid employment.

Legal Aid Advocates Fellowship Program

Since 1999, the Foundation and its Florida funding partners have provided matching funds for 32 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 assistance organizations.

In addition to addressing the civil legal needs of the poor in Florida, the Legal Aid Advocates Fellowship program enriches Florida's legal assistance community through the enthusiasm of individual Fellows who renew and enliven a host program's legal advocacy.

In 2002-03, the Foundation approved matching funds for six Fellows in the Class of 2003-05 and was joined by funding partners Dean, Mead, Egerton, Bloodworth, Capouano & Bozarth, P.A., GrayRobinson, P.A., Hill, Ward & Henderson, P.A., Mellon United National Bank, Rogow Greenberg Foundation and Bruce S. Rogow.

The Florida Bar Foundation Legal Aid Advocates Fellowships Class of 2003 - 2005

Host Legal Aid Program	Fellow	Project Name
University of Miami Children and Youth Law Clinic	Tammy Wilsker	Legal advocacy and outreach to older foster youth
Florida Institutional Legal Services	Kristen Cooley	Legal advocacy for civilly committed sex offenders requiring mental health treatment and adequate living conditions
Legal Aid Society of Palm Beach County	Tim Stevens	Legal advocacy and outreach to low-income grandparent caregivers
Florida Legal Services	Monica Ramirez	Legal advocacy and outreach to female farmworkers who are victims of sexual harassment and/or gender discrimination
Florida Immigrant Advocacy Center	Sabrina Salomon	Legal representation of low-income Haitian immigrant women and children who are victims of domestic violence
Three Rivers Legal Services	Rocky Mamerto Cabagnot	Development of a comprehensive model for delivery of legal services and education about legal rights in rural North Florida

Checking Off for Justice – Lawyers' Challenge for Children

As you complete your Annual Bar Fee Statement next spring, please consider contributing to the Foundation's Children's Legal Services Grant Program through the Lawyer's Challenge for Children. Just add your gift to your Bar Fee Statement total. Your support will help remove legal barriers to a productive future for thousands of low income children in Florida.



Children's Legal Services

Since 1999, The Florida Bar Foundation has funded special annual grants for legal assistance to children. Starting in 2000-01, gifts from attorneys to the Foundation from the Lawyer's Challenge for Children on the annual Florida Bar Fee Statement and from other sources also support these grants.

The Foundation set several goals for its Children's Legal Services grant initiative, but emphasizes access to special education and health care services required under law. Another goal is to create and energize a statewide network of children's legal services providers. The network also can provide support to the thousands of Florida attorneys involved in children's legal services through guardian ad litem and other projects.

In 2002-03, the Foundation gave Children's Legal Services grants totaling \$661,000 to 14 local legal aid and legal services programs.

Barry University School of Law Children First	Orlando	\$115,150.00
Central Florida Legal Services Legal Services for Children with Special Needs	Daytona Beach	\$47,000.00
Florida Immigrant Advocacy Center Unaccompanied Minor's Project	Miami	\$15,000.00
Florida Legal Services Children's Impact Advocacy and Clearinghouse for State Support	Tallahassee	\$73,500.00
Florida State University College of Law Children's Advocacy Center	Tallahassee	\$60,000.00
Lawyers for Children America Teen Legal Project	Miami	\$15,000.00
Legal Aid Service of Broward County Education Legal Rights	Ft. Lauderdale	\$25,000.00
Legal Aid Society of Orange County Bar Association Legal Services for Foster Children with Special Education Needs	Orlando	\$25,000.00
Legal Aid Society of Palm Beach County Educational Advocacy	West Palm Beach	\$25,000.00
Legal Services Greater Miami Special Education Advocacy Project	Miami	\$25,000.00
Legal Services of North Florida Teen Law Initiative	Tallahassee	\$15,500.00
Southern Legal Counsel Special Education Advocacy Project	Gainesville	\$100,000.00
University of Miami School of Law Children and Youth Law Clinic Children First	Coral Gables	\$104,850.00
Withlacoochee Area Legal Services Children's Advocacy Project	Ocala	\$15,000.00
Total		\$661,000.00

Law Student Assistance Grants

Foundation Law Student Assistance Grant Programs promote the concept of public service and provide financial assistance to eligible students at Florida's accredited law schools.

Public Service Fellows Program

Program Goals

- To promote pro bono legal services by members of the legal profession;
- To provide law students with direct involvement in public service legal assistance activities; and
- To promote the concept of public service legal work on law school campuses generally.

Public Service Fellows 2002-2003 Grant Awards

Forty-four students participated in the 2002-03 IOTA Public Service Fellows Program and contributed over 9,361 hours of direct public service. Students work at legal aid offices, guardian ad litem programs, public defender offices, state attorney offices and other public service agencies.

Florida Coastal School of Law Jacksonville	\$8,200.00
Florida State University College of Law Tallahassee	\$13,600.00

Nova Southeastern University/Shepard Broad Law Center Fort Lauderdale	\$13,600.00
St. Thomas University School of Law Miami	\$11,800.00
Stetson University College of Law St. Petersburg	\$13,600.00
University of Florida Levin College of Law Gainesville	\$13,200.00
University of Miami School of Law Coral Gables	\$16,000.00
TOTAL	\$90,000.00



Class of 2003 Summer Fellows Training Seminar.

Legal Services Summer Fellowship Program

In cooperation with Florida's fully accredited law schools, the Foundation administers a Summer Fellowship Program for first- and second-year law students at Foundation-funded legal assistance programs in Florida. In 2002-03, \$120,500.00 was awarded for Summer 2003 Fellowships. Twenty-one law students were assigned to 18 legal assistance programs for eleven-week internships from May to August 2003. Partnering with the Foundation in funding Summer Fellows are Florida Lawyers Legal Insurance Corporation (FLLIC) and Florida Legal Services Project Directors Association (PDA).

Rossana Arteaga*	Legal Aid Service of Broward County
Nadine Castro	Seminole County Bar Association Legal Aid Society
Barbara Costa	Legal Aid Society of Palm Beach County
Cassandra Fequiere	Three Rivers Legal Services
Evan George	Florida Institutional Legal Services
Zachary Hicks	Legal Aid Service of Broward County
Whitney Husby	Legal Aid of Manasota
Lisa Lauck	University of Miami Children and Youth Law Clinic
Christopher Lovelady	Gulfcoast Legal Services
Luis Maldonado	Withlacoochee Area Legal Services
Jennifer Margolis	Dade County Bar Association Legal Aid Society
Richard Middagh	Florida Rural Legal Services
Analise Perales	Legal Services of Greater Miami
Cassandra Rosas*	Florida Justice Institute
Lisa Ruby	Florida Immigrant Advocacy Center
Sylvia Simmons**	Florida Legal Services
Laura Sterling	Legal Aid Society of the Orange County Bar Association
Valerie Thompson	Northwest Florida Legal Services
Josephine Vacciana	Three Rivers Legal Services
C. Danette Zaghari-Mark	Southern Legal Counsel
Jessica Zagier	Florida Immigrant Advocacy Center

*funded by FLLIC

**The Terry Russell Summer Fellow funded by the PDA

"I enjoyed researching "real" issues. It was motivating to think that the consequence of my performance was not merely a good or bad grade; rather it could impact a client's outcome."

"I came to have a deeper understanding of the critical role attorneys play in their clients' lives. Whether it was a housing, special education or health care issue, it was sobering to realize that the clients have a strong dependence on the attorneys who are working on their behalf."

"My fellowship experience last year caused me to forego traditional on-campus interviewing for a chance to return to my program this summer. It further encouraged me to apply for a [Foundation] public service fellowship which I received."

Comments of 2003 Summer Fellows

"Along with the Foundation's support of Legal Aid Advocates Fellows and Loan Repayment Assistance, this program helps invigorate our legal services community with new, energetic and committed advocates."

"During our Fellow's tenure, he made significant contributions to our Senior Unit. His excellent research skills enabled our staff to process and review cases in a very efficient and productive manner."

Comments of 2003 Host Legal Aid Programs



The "Bringing Home the Bacon" piggy bank was presented to Foundation Director William H. Davis at the Foundation's annual dinner in June for his outstanding work on the Tallahassee Fellows Recruitment Campaign.

Thanks, we couldn't do it without you

Also making a difference are the attorneys, law firms, and others who contributed to our successes in 2002-03 through pro bono services to the Foundation itself:

- Christine Barney, RBB Public Relations, Coral Gables
- William O.E. Henry, Orlando, and Jeffrey S. Levin, New York, Holland & Knight, LLP
- David R. Punzak, Carlton Fields, P.A., St. Petersburg
- Donald C. Works, III, Jackson, Lewis, et al, Orlando

Medal of Honor Awards



Robert M. Ervin receives the prestigious Medal of Honor for an attorney on June 26, 2003 in Orlando. Foundation President William L. Thompson, Jr. presents the award.

The Florida Bar Foundation Medal of Honor Award Program was established in 1977 to recognize outstanding achievements in improving the administration of justice in Florida. Two categories of award recipients have been designated.

The first is for a member of The Florida Bar who has demonstrated his or her dedication to the objectives of the 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."

The second is given to a non-lawyer or person not actively engaged in the practice of law who has made an outstanding contribution to the improvement in the administration of justice through research, writing, or other deeds of such character and quality that, in the judgment of the Foundation, warrant the highest award that can be bestowed by the Foundation.

The 2003 Medal of Honor for a lawyer was presented to Robert M. Ervin, a partner in the Tallahassee law firm of Ervin, Boyd & Allaman, for his dedication to improving the administration of justice. Ervin was recognized for a career of exemplary public and professional service as a lawyer and for his leadership in creating and developing some of the most important public service functions and activities of the organized bar in the past half century.

Excerpt from Medal of Honor Citation for Robert M. Ervin

For dedication to improving the administration of justice and as a leader in fostering programs and institutions that continue today to advance the interests of the public and the legal profession he so loves.



Lois Thacker Graessle receives the prestigious Medal of Honor Award for a non-lawyer on June 26, 2003 in Orlando. Foundation President William L. Thompson presents the award.

Lois Thacker Graessle, a longtime Jacksonville civic leader, was presented with the 2003 Medal of Honor for a non-lawyer for a lifetime of dedicated and selfless volunteer service in the pursuit of justice.

Excerpt from Medal of Honor Citation for Lois Thacker Graessle

A feminist, a liberal and a philosopher, she persists in her mission today, renewing her call that the community focus its energies to meet the challenge of making life more equitable for all its citizens.

Improvements in the Administration of Justice Grant Program

Grantmaking Philosophy

A goal of The Florida Bar Foundation is to focus grants in areas where the funding can have a measurable impact. Toward that end, the Foundation concentrates 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; and
- 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; and
- 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 Grant Program

2002-03 Grant Awards

Public education and understanding about the law, including law-related education

Florida Law Related Education Association, Inc. Tallahassee Advancing Law-Related Education in Florida	\$181,125.00
Florida Law Related Education Association, Inc. Tallahassee Justice in Teaching Institute	\$9,121.00

Improvement and reform of the criminal, civil, and juvenile justice systems

Lee County Clerk of Courts Ft. Myers Lee County Pay-or-Appear Program	\$86,000.00
The Florida Bar and The Florida Bar Foundation Tallahassee Supreme Court Commission Message Development for State Court System Funding	\$40,000.00
Eleventh Judicial Circuit Administrative Office of the Courts Miami Lady Justice Needs You for Jury Service	\$60,000.00

Promotion and support for public interest legal representation

Professor Michael L. Radlet University of Colorado, Boulder, Colorado Tracking Florida Death Row Inmates	\$4,340.00
Florida Legal Services Tallahassee Juvenile Justice and Delinquency Prevention Advocacy Project – "Team Child"	\$69,000.00

Total

\$449,586.00

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 Foundation and had, for many years, served as the touchstone 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 a Foundation 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.

2003 Recipients

First Place

Florida Justice Institute and Florida Institutional Legal Services
Close Management (Isolation) Project

This project successfully challenged the conditions and administration of the solitary confinement system in Florida's state prisons, particularly as it was utilized against mentally ill prisoners.

First Runner-Up

University of Miami School of Law, Children and Youth Law Clinic and Legal Aid Society of Palm Beach County
Older Foster Youth Advocacy Project

This project challenged and reformed the standards by which the State of Florida limited and terminated the rights of older foster children to benefits which helped them to successfully transition from foster care to adulthood.

Second Runner-Up

Central Florida Legal Services
Daytona Beach Housing Authority Project

This project protected and advanced the rights of low income tenants in public housing to ensure that tenants receive benefits to which they are legally entitled and are not charged with unauthorized fees.

Fellows Program & Endowment Trust

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 of the Foundation.

Fellows contribute \$1,000 to become life members of the Foundation. Pledge payments can be extended over a period of five years and are charitable contributions to the Foundation.

Director's Circle

J. Wayne Hogan

Gold Circle

John W. Frost
Stuart Z. Grossman
William O.E. Henry
Miles A. McGrane III

Silver Circle

Darryl M. Bloodworth
A. Hamilton Cooke
Jane Elizabeth Curran
Howard M. Neu
Daryl Parks
Lou Ann Powell
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Frank M. Bedell
Joseph David Wentworth Beeler
R. Lee Bennett
Wings Slocum Benton
Howard Jay Berlin
Mary-Anne Bestebeurtje
David Wintrop Bianchi
Barbara Bisno
Sally Blackmun
Bruce B. Blackwell
Russell Merrin Blain
William Jay Blechman
Byron Block
Mark Bloom
Edward R. Blumberg
Ronald Lee Book
Tyrrie Boyer
Dana Gibson Bradford II
Debra Braga
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Jennifer R. Coberly
Kendall B. Coffey
Howard Coleman Coker
Ira Coleman
Dean C. Colson
Deborah S. Corbishley
William W. Corry
Henry M. Cox III
Thomas P. Crapps
Richard Harvey Critchlow
Benjamin L. Crump
Thomas A. Culmo
Michele Kane Cummings
Stephen Cypen
Howard L. Dale
Gabrielle L. D'Alemberte
Talbot D'Alemberte
Roy B. Dalton, Jr.
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Nancy A. Daniels
Joseph C. D'Annunzio
Edward B. Davis
William H. Davis
Stephen E. Day
Mary Anne De Petrillo
David Deehl
Ignacio Del Valle
Bernard H. Dempsey, Jr.
Lauren Detzel
Carlos DeZayas
Alan T. Dimond
Jesse H. Diner
Kathleen Dolan-Valdes
W. Dexter Douglass
Mayame Downs
Paul C. Doyle
Anibal Duarte-Viera
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Eli Harold Subin
John J. Sulik
Dwight Sullivan
Timon V. Sullivan
Alan C. Sundberg
Roland Sutcliffe, Jr.
Chantale Leif Suttle
William Francis Sutton, Jr.
Herbert Walker Tannenbaum
Dennis P. Thompson

Hon. Emerson R. Thompson
William L. Thompson, Jr.
John W. Thornton, Jr.
Melinda Thornton
Richard Joseph Thornton
George Eurpede Tragos
Robert Traurig
A. Rodger Traynor, Jr.
William Trickel, Jr.
Harley S. Tropin
Richard Troutman
Russell Troutman
Catherine Tucker
M. Stephen Turner
Steven J. Uhlfelder
Samuel C. Ullman
David Elmer Ward, Jr.
Natalia Utrera
Hon. William A. VanNortwick, Jr.
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George Volsky
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Bill Wagner
J. Jeffrey Wahlen
Mary L. Wakeman
Stanley Wakschlag
Sylvia H. Walbolt
James H. Walden
Deana Walker
Vernetta L. Walker
Michael Raymond Walsh
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Richard P. Warfield
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Robert Wayne
Nancy Weber
Lori Weems Herz
Donald J. Weidner
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Carol A. Whery
William Whitaker
Larry K. White
C. Gary Williams
O. Edgar Williams, Jr.
Reginald L. Williams
William E. Williams
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Richard Frederick Wolfson
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Frank Wotitzky
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John A. Yanchunis
Leighton D. Yates, Jr.
Nicholas Youclas
Burton Young
Stephen N. Zack
Thomas Zehnder
Louise Zehli
Harry Zukernick

Memorial Fellows

Hon. Sidney Aronovitz

The Foundation strives to present a complete and correct list of donors. If a mistake has been made in your listing, we sincerely apologize and ask that you contact Amanda Styles so that we may correct our records.

Tallahassee Fellows Campaign Committee

Thanks to the following volunteers for their work recruiting new Fellows in Tallahassee in the spring of 2003.

- | | |
|---|--------------------------|
| William H. Davis
<i>Chair</i> | M. Catherine Lannon |
| Philip Bruce Culpepper
<i>Vice-Chair</i> | James Elliott Messer |
| W. Dexter Douglass | Harry Lewis Michaels |
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| Kenneth R. Hart | Robert Rivas |
| Kelly Overstreet Johnson | Lawrence E. Sellers, Jr. |
| | Linda F. Wells |



Fellows and friends at the Law Day Celebration following the Tallahassee Fellows Campaign.

Other Contributors

- Children's Legal Services Grant Program**
1760 Attorneys through The Florida Bar Fee Statement
Cy Pres Award
Javier Guadayol
James Keeter
John P. Seiler
- Legal Aid Advocates Fellowship Program**
Dean, Mead, Egerton, Bloodworth, Capouano & Bozarth, P.A.
GrayRobinson, P.A.
Hill, Ward & Henderson, P.A.
Mellon United National Bank
Rogow Greenberg Foundation and Bruce S. Rogow
- Legal Assistance for the Poor Grant Program**
Jeffrey L. Shore
Yasmine Zyne
- Legal Services Summer Fellowship Program**
Florida Lawyers' Legal Insurance Corporation
Legal Services Project Directors Association in honor of Terry Russell
- Samuel S. Smith Endowment Fund of The Florida Bar Foundation Endowment Trust**
Ruden McClosky Smith Schuster & Russell, P.A.
- Unrestricted Gifts**
Luis Lucas Fernandez

Memorial Gifts

Burton Young in memory of Fletcher Rush

From the Executive Director

Making a Difference

I think that there are at least three reasons organizations succeed. Great volunteers. Great staff. And a great partnership between the two. The Florida Bar Foundation has all three. In his President's Message, Bill Thompson celebrates the generous contributions of time, talent and energy of the Foundation's volunteer leadership. Now, I'd like to boast a bit about the Foundation's staff and describe just a little about their individual contributions to the Foundation's success.

In 2002-03, there were 13 Foundation staff members, five of whom have been at the Foundation for more than ten years, and two for more than 15 years. The names of many staff are familiar.

Paul Doyle provides the vision for the Foundation's legal assistance for the poor grant program. Lou Ann Powell assures the accuracy and integrity of our financial systems. Deana Walker makes sure the office runs smoothly and that we get our paychecks. LuShawn Phillips and Emily Silvia help the lawyers, law firms and financial institutions who are the IOTA program. And, Carol Wherry assists the board with their information needs, including the meeting materials on which the board bases its decisions. The names of two newer staff are becoming ever better known to Fellows recruiting committee members and Fellows alike — Amanda Styles, who heads up our fundraising program, and development assistant Nancy Saxton. Not as familiar, perhaps, are the names of other staff who are key to the Foundation's success —

Foundation grant coordinators Camille Stawicki and Andrea Kempkens, receptionist Jessica Perez, and staff accountant Judy Godette. We said goodbye this year to long-time grants administrator Cathy Perry who joined the staff in 1988.

The longevity of the Foundation's staff speaks most to the importance of the Foundation's mission of assuring greater access to justice. But also to staff's dedication and professionalism. In the quality of their work, their judgments and consistent effort, the staff of The Florida Bar Foundation are truly remarkable


JANE ELIZABETH CURRAN
Executive Director

The Florida Bar Foundation

2002-03 Officers and Board Members

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President

Andrew M. O'Malley
President-Elect

William H. Davis
Secretary/Treasurer

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Endowment Trustees

Term Expires

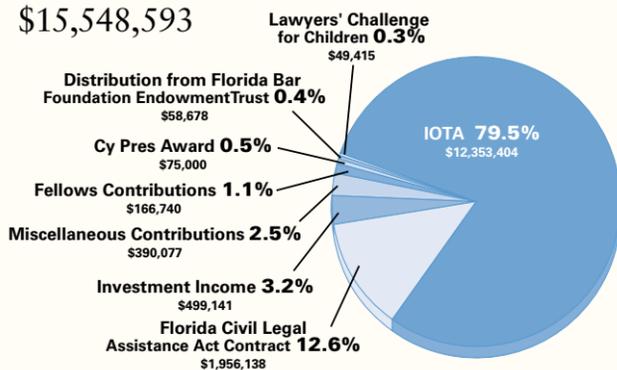
Neal R. Sonnett June 30, 2003
James A. Baxter June 30, 2004
Rene V. Murai June 30, 2005
A. Hamilton Cooke June 30, 2006
Darryl M. Bloodworth June 30, 2007

Staff

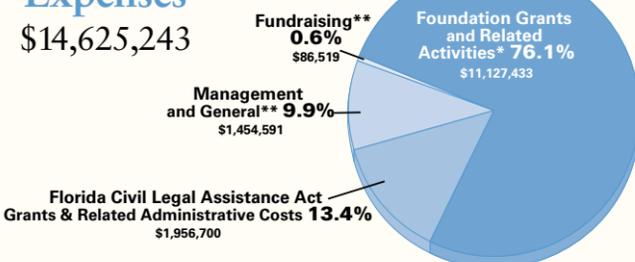
Jane Elizabeth Curran
Executive Director

FINANCIAL INFORMATION

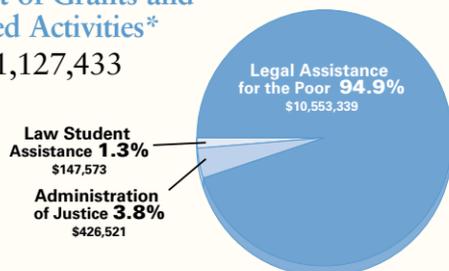
2002-03 Revenues \$15,548,593



2002-03 Expenses \$14,625,243



2002-03 Breakout of Grants and Related Activities* \$11,127,433



* Foundation grant amounts are based upon the net revenues of the 2001-02 fiscal year and amounts may differ from grant totals listed elsewhere in this report because of conditional and multi-year grants.

**Administrative expenses represent 10.5% of the Foundation's total activities

Audited financial statements are available from the Foundation upon request. The Foundation's IRS Form 990 is available from the Foundation and on the Foundation's Web site at www.flabarfdn.org.

IOTA Revenues Increase Slightly In FY 2002-2003

In spite of continually declining interest rates, annual IOTA revenues in FY 2002-03 at \$12.3 million were slightly ahead of 2001-02 due to implementation of revisions to the IOTA Rule and increases in Florida legal activity.

To increase revenues for IOTA's charitable purposes, the Florida Supreme Court approved amendments to the IOTA Rule in June 2001 requiring banks, which choose to offer IOTA accounts, to pay the highest interest rate or dividend generally available to their similarly-situated non-IOTA customers. Unfortunately, shortly afterward, interest rates began falling. As a result, IOTA revenue increases from the rule amendments have been smaller 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 revenues.

Profile of the IOTA Account Portfolio as of June 2003

Total Number of IOTA Accounts	21,663
Weighted Average IOTA Account Interest Rate	.57%
Total Principal Balance in IOTA Accounts	\$2.46 Billion
Average Balance per Account	\$104,559
Number of Lawyers Participating in IOTA	28,739
Number of Banks Participating in IOTA	315

GOVERNANCE

The Florida Bar Foundation is a not-for-profit Florida corporation established in 1956 by the Board of Governors of The Florida Bar to foster law-related public interest programs on behalf of Florida's legal profession. Membership is open to all members in good standing of The Florida Bar. Members are eligible to hold office and serve as directors of the Foundation. Participants in Florida's Interest on Trust Accounts ("IOTA") program, administered by the Foundation, are automatically entitled to membership. Membership also is available through annual Foundation dues or through the Foundation's Fellows program. Both annual dues and Fellows contributions are charitable contributions to the Foundation.

The Foundation is governed by a 29-member board of directors which meets quarterly. The board conducts its work through ad hoc and standing committees. The board is comprised of the officers

of the Foundation, six directors by designation (two judicial officers appointed by the Chief Justice of the Florida Supreme Court, the president, president-elect, and immediate past president of The Florida Bar, and the president of Florida Legal Services, which provides coordination, training and other support services to legal aid programs across the state), two public members and 18 at-large directors. At-large directors serve a maximum of two, three-year terms, with one third selected by the board of governors of The Florida Bar, one third by the board of directors of the Foundation, and one third by the Florida Supreme Court.

Committees are appointed annually by the president, and include Foundation directors, members of the bar generally, and the lay public. A nine-member executive committee appointed annually by the board meets between meetings of the board.



The Florida Bar Foundation

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