

2021-22

ANNUAL REPORT

THE FLORIDA BAR FOUNDATION

Message from 2021-22 President Connie Bookman

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

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

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

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

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

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

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

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

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

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

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



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

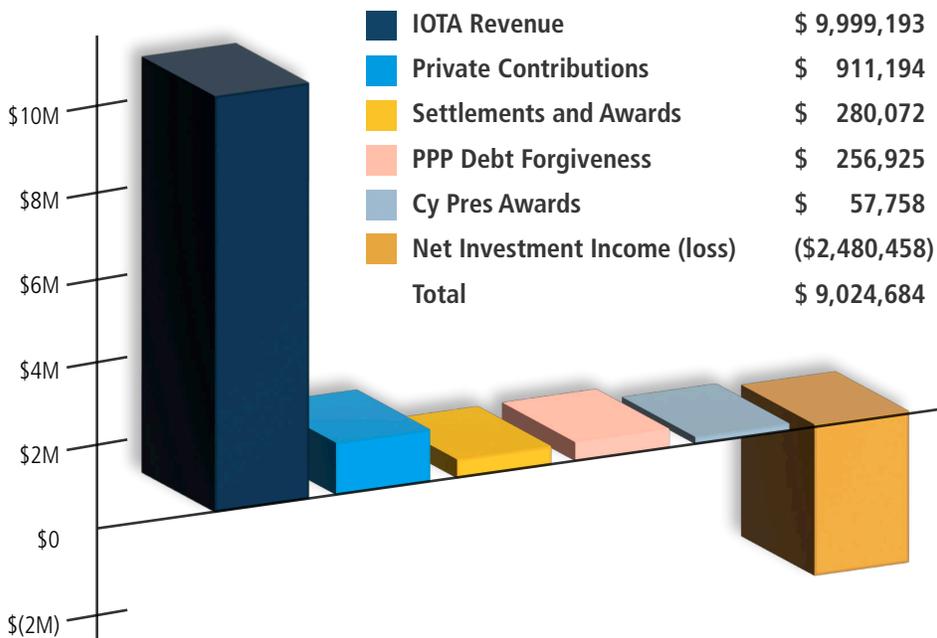
IOTA Rule implementation

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

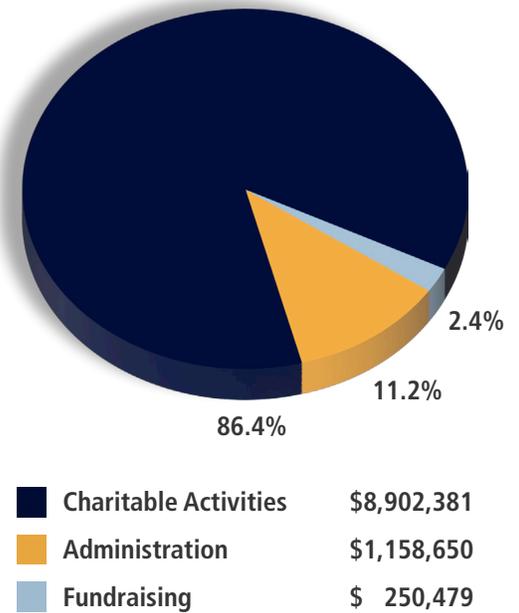
see MESSAGE, p. 9

2021-22 FISCAL SNAPSHOT

FUNDING SOURCES



HOW FUNDS ARE SPENT



GRANT EXPENDITURES



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

MESSAGE, from p. 8

Purchase of new building

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

Alan B. Bookman Service in Leadership Award

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

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

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

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

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

The Legacy for Justice

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

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 Anonymous Fund - Community Foundation of Sarasota County, Inc.
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 The Batchelor Foundation
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 Sean Estes*
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 The Florida Bar Business Law Section
 The Florida Bar Criminal Law Section
 The Florida Bar Family Law Section
 The Florida Bar General Practice, Solo and Small Firm Section
 The Florida Bar Real Property, Probate & Trust Law Section
 The Florida Bar Trial Lawyers Section
 The Florida Bar Young Lawyers Division

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 Hon. William A. Van Nortwick Jr.* ** and
 Maria Henderson*
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 Matthew D. Weidner
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 Jewel White*
 Kent G. Whittemore
 John Yanchunis*
 E. Clayton Yates
 Burton Young*
 Edward H. Zebersky

* Florida Bar Foundation Fellow ** Deceased

2,303,883

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

2021-22 Florida Bar Foundation Fellows



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

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

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

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

Lifetime Giving Circles

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

Judge's Society

(\$500,000-999,999)

Anonymous

Anonymous

The Florida Bar Family Law Section

Liggio Law PA

John A Yanchunis*

Advocate's Society

(\$250,000-499,999)

The Batchelor Foundation, Inc.

The Florida Bar Young Lawyers Division

Anonymous

Robert W. Murphy

Barrister's Society

(\$100,000-249,999)

The Florida Bar Business Law
Section

The Florida Bar Criminal Law Section

The Florida Bar Trial Lawyers Section

Florida Lawyers Mutual Insurance
Company

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Counselor's Society

(\$50,000-99,999)

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Shiple P.A.

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Coker Law

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(\$10,000-24,999)

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



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