

# THE FLORIDA BAR FOUNDATION

## 2012-13 Annual Report

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Leadership and Funding for Justice in Florida

# The President's Message

What a wonderful experience my past nine years on the board of directors of The Florida Bar Foundation has been. Having my colleagues entrust me with the role of president was the highest praise, but anyone who has served in a leadership capacity knows that success is the result of the right team. And what a terrific team I had – my fellow officers and board members, along with Jane Curran, Paul Doyle, Lou Ann Powell and the rest of the tireless staff at the Foundation, the grantees, and our Fellows. Everyone has made significant contributions.

While the past year presented a number of challenges as continued low interest rates depressed IOTA funds and consequently, reduced grants, there is a silver lining. Many of The Florida Bar sections and divisions provided financial support to the Foundation through generous gifts. New Fellows joined us, and individuals gave through various activities such as the Children's Legal Services campaign. We were able to make nearly \$17 million in grants, and our grantees have continued to do amazing work as the population who needs their support and talents grows. The staff at

the Foundation took on numerous roles as they, too, had to downsize. But the work continues to get done in the most excellent way, as they provide support and guidance.

Sadly, it was during my term that my friend, Paul Doyle, who served the Foundation as Director of Legal Assistance for the Poor/Law Student Assistance Grant Programs for 22 years, retired. Paul will be missed by all of us. Happily, we now have Melissa Pershing serving in this role. Melissa brings a wealth of knowledge and creativity, and I am delighted that she is part of our organization.

One of the most rewarding parts of my role is to recognize those who have provided great service to help provide legal assistance to the poor. First, what a gift it was to honor former Florida Supreme Court Justice Arthur England with the IOTA Founder's Award before his passing in July. Arthur not only was instrumental in getting the funding in Florida, but he provided guidance to other states as they adopted similar programs. I was also especially happy to present Bob Josefsberg with the 2013 Medal of Honor Award. Bob is a role model for all of us



Maria E. Henderson

as he manages to find time to assist the poorest of the poor.

Now the board is being led by one of the wisest and kindest people I know, John Patterson. John is a strategic thinker and has already challenged us to look for creative solutions for access to justice. While I will miss being the president, I am excited to serve this final year with John's leadership.

Sincerely,

A handwritten signature in black ink, appearing to read 'Maria E. Henderson', written in a cursive style.

Maria E. Henderson  
President, 2012-13

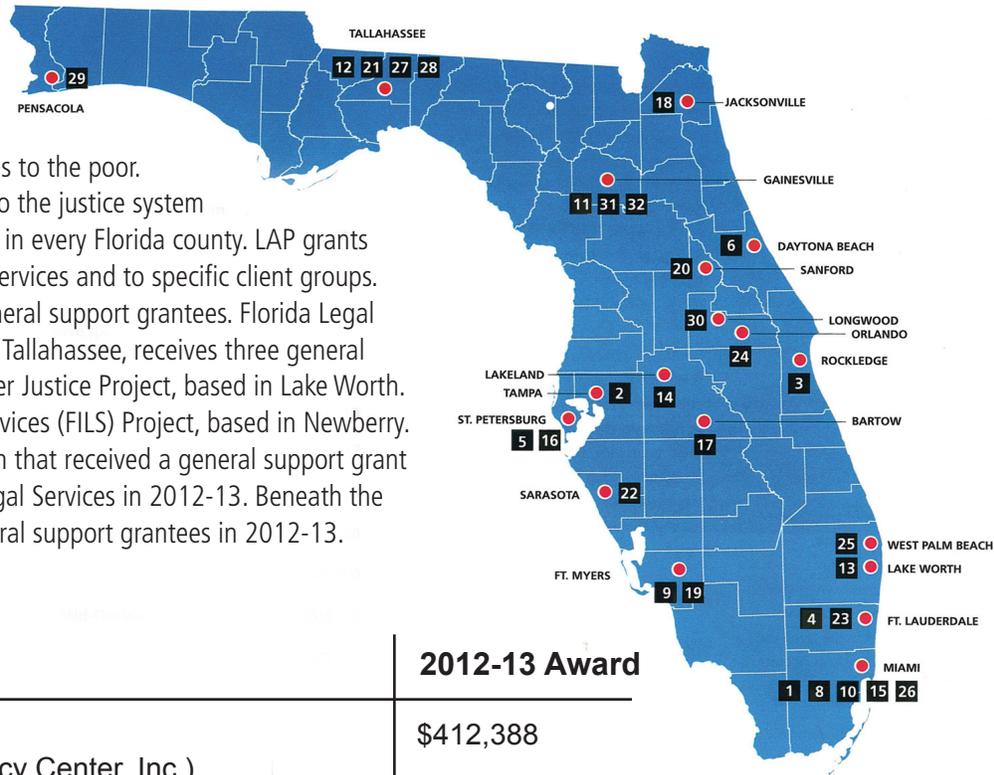
## Providing access to justice for Florida's most vulnerable residents

The Florida Bar Foundation provides leadership and funding to support and strengthen Florida legal services programs and increase client services. This report provides information on grantmaking and financials for the 2012-13 fiscal year. But to put the information into context, we can look at the following data from the 2012 calendar year, for which statewide data is now available on the results from 2011-12 grantmaking:

- Of \$87.12 million received by Florida legal services organizations in 2012, \$21.88 million, or 25.1 percent, came from The Florida Bar Foundation
- The Foundation is the only funder linking 30 legal services programs in Florida to form a comprehensive, statewide legal services delivery system. The federally funded Legal Services Corporation is the second-largest funder of legal aid in Florida, providing 19.7 percent of all funding received by Florida legal aid organizations in 2012, but many legal aid programs do not receive LSC funding and therefore rely more heavily on Foundation funding.
- Foundation grantees documented direct dollar benefits to clients totaling more than \$65 million in 2012 from sources including child support and federal programs such as Social Security and Supplemental Security Income, which is designed to provide food, shelter and medical care to the elderly and disabled.
- Foundation-funded providers completed 89,720 cases in 2012.
- Legal aid handled 10 cases for every \$10,000 in funding in 2012, with 77 percent of cases resolved without litigation.

# Legal Assistance for the Poor Grant Program

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 greater access to the justice system for low-income individuals and families residing in every Florida county. LAP grants also support legal assistance for specific client services and to specific client groups. This map shows the locations of the 30 LAP general support grantees. Florida Legal Services, a statewide program headquartered in Tallahassee, receives three general support grants. One is for its Migrant Farmworker Justice Project, based in Lake Worth. The other is for its Florida Institutional Legal Services (FILS) Project, based in Newberry. FILS, once an independent legal aid organization that received a general support grant from the Foundation, became part of Florida Legal Services in 2012-13. Beneath the map is a list of the 32 grants made to LAP general support grantees in 2012-13.



## General Support Grants

### Grantee (main office)

### 2012-13 Award

1. Americans for Immigrant Justice (formerly Florida Immigrant Advocacy Center, Inc.) <i>Miami</i>	\$412,388
2. Bay Area Legal Services, Inc. <i>Tampa</i>	\$180,393
3. Brevard County Legal Aid, Inc. <i>Rockledge</i>	\$54,228
4. Coast to Coast Legal Aid of South Florida, Inc. <i>Plantation</i>	\$16,880
5. Community Law Program, Inc. <i>St. Petersburg</i>	\$20,702
6. Community Legal Services of Mid-Florida, Inc. <i>Daytona Beach</i>	\$234,623
7. Cuban American Bar Association Pro Bono Project <i>Miami</i>	\$32,642
8. Dade County Bar Association Legal Aid Society <i>Miami</i>	\$251,818
9. Florida Equal Justice Center, Inc. <i>Fort Myers</i>	\$295,345
10. Florida Justice Institute, Inc.* <i>Miami</i>	\$235,729
11. Florida Legal Services, Inc.* <i>FILS Project</i> <i>Newberry</i>	\$502,040
12. Florida Legal Services, Inc.* <i>Tallahassee</i>	\$1,398,625
13. Florida Legal Services, Inc.* <i>Migrant Farmworker Justice Project</i> <i>Lake Worth</i>	\$461,778

<b>Grantee</b> <i>(main office)</i>	<b>2012-13 Award</b>
14. Florida Rural Legal Services, Inc. <i>Lakeland</i>	\$247,460
15. Guardianship Program of Dade County, Inc. <i>Miami</i>	\$42,120
16. Gulfcoast Legal Services, Inc. <i>St. Petersburg</i>	\$658,444
17. Heart of Florida Legal Aid Society, Inc. <i>Bartow</i>	\$73,087
18. Jacksonville Area Legal Aid, Inc. <i>Jacksonville</i>	\$543,022
19. Lee County Legal Aid Society, Inc. <i>Fort Myers</i>	\$36,605
20. Legal Advocacy Center of Central Florida, Inc. <i>Sanford</i>	\$392,377
21. Legal Aid Foundation of the Tallahassee Bar Association <i>Tallahassee</i>	\$27,929
22. Legal Aid of Manasota, Inc. <i>Sarasota</i>	\$20,702
23. Legal Aid Service of Broward County, Inc. <i>Plantation</i>	\$584,967
24. Legal Aid Society of the Orange County Bar Association <i>Orlando</i>	\$347,299
25. Legal Aid Society of Palm Beach County, Inc. <i>West Palm Beach</i>	\$229,931
26. Legal Services of Greater Miami, Inc. <i>Miami</i>	\$416,591
27. Legal Services of North Florida, Inc. <i>Tallahassee</i>	\$146,175
28. North Florida Center for Equal Justice, Inc. <i>Tallahassee</i>	\$128,844
29. Northwest Florida Legal Services, Inc. <i>Pensacola</i>	\$175,299
30. Seminole County Bar Association Legal Aid Society <i>Longwood</i>	\$42,405
31. Southern Legal Counsel, Inc.* <i>Gainesville</i>	\$204,109
32. Three Rivers Legal Services, Inc. <i>Gainesville</i>	\$42,461
<b>TOTAL</b>	<b>\$8,442,984</b>

\* These grants are non poverty-population based or have non poverty-population based components that support statewide legal aid services and activities.

All general support grants not marked with an asterisk are poverty-population based.

## Foundation support for pro bono services by Florida Bar members

Florida legal aid grantees reported that 6,547 members of The Florida Bar donated their time in 2012 to handle 13,444 cases, which represented 15 percent of all cases closed by Foundation legal aid grantees. At an average rate of \$120 an hour, the 105,079 hours contributed by Florida attorneys through organized pro bono programs in 2012 represents \$12.6 million of free legal assistance for low-income Florida residents.

Foundation legal aid grants support the intake and referral of cases to pro bono attorneys and provide such volunteers with backup support and training. There is a wide variety of pro bono service opportunities for Florida attorneys, including:

- Handling cases in family law, housing matters, immigration, etc.
- Transactional attorneys helping community groups develop affordable housing
- Providing advice and counsel through clinics
- Representing children in dependency proceedings
- Co-counseling cases with legal aid attorneys in housing and consumer law
- Assisting particularly vulnerable clients, such as the elderly, the disabled and the mentally ill.

Not all pro bono work has to involve direct representation of clients. For example, pro bono attorneys can also:

- Provide substantive law and skills training to legal aid attorneys
- Serve as mentors to less experienced legal aid attorneys
- Do client intake
- Participate 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.

## Pro bono attorney provides scam victim a fresh start

On the verge of 75, Caroline Pennington found herself starting all over.

After a lifetime of hard work and solo parenting, the former marketing executive fell victim to an investment scam that wiped out her nest egg.

Fearing she would end up on the street, Pennington turned to Dade Legal Aid staff attorney Annika Miranda, a bankruptcy lawyer with the “Put Something Back” program.

Miranda’s position was initially supported through a \$25,500 Pilot Pro Bono grant from The Florida Bar Foundation in 2010-11, with ongoing support from the Bankruptcy Bar Association. The Florida Bar Foundation also provided Dade Legal Aid with a \$251,818 general support grant in 2012-13, which helps fund the organization’s operations.

Miranda matched Pennington with pro bono attorney Dorothy Negrin.

“I helped her with actually filing the

bankruptcy and getting the discharge she needed to get a fresh start,” Negrin said.

In all, Negrin invested 19 hours in the case, for which Pennington is exceedingly grateful.

“My whole life has changed since the bankruptcy,” Pennington said.

“You have to be creative to rebuild, to overcome the psychological effect of going broke completely, nearly going into the street after having a decent life.”

Negrin, who has handled a wide variety of pro bono cases, said she finds that the court, legal aid organizations and other lawyers are always willing to help when they know she is handling a case pro bono.

“I consider myself pretty lucky in life so I like to give back, even if it’s only a small amount,” Negrin said. “It’s one case. There are thousands of attorneys in Florida. If everyone took on one case, I’m sure there wouldn’t be that much of a need.”



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*“I consider myself pretty lucky in life so I like to give back, even if it’s only a small amount.”*

– Dorothy Negrin

# How legal assistance grantees helped in 2012

## Income Maintenance Matters:

(AFDC, Social Security, SSI, food stamps, unemployment compensation, veterans' benefits, workers' compensation)

"Tory," a 4-year-old girl with cystic fibrosis, requires round-the-clock care and two hours a day of treatment to survive. As her full-time caregiver, Tory's mother could not work outside the home. Meanwhile, Tory's father received limited and variable earnings from his work in industrial mills, which often left the family unable to pay the bills. Legal Aid was able to help Tory's parents obtain monthly Supplemental Security Income benefits of \$698 a month, along with retroactive benefits of \$12,891, providing the family with the economic stability they needed to be able to continue caring for their daughter at home.

*Three Rivers Legal Services, Gainesville*

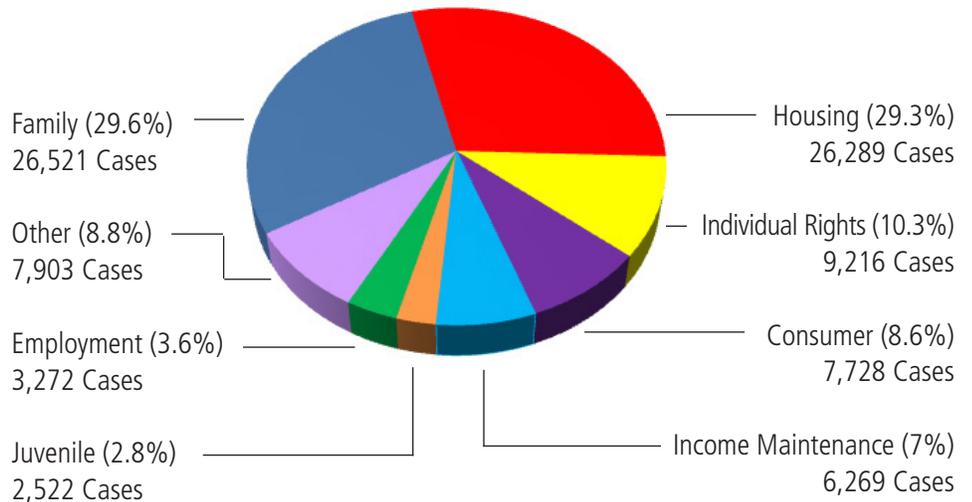
## Individual Rights:

(immigration/naturalization, mental health, prisoners' rights, physically disabled rights)

Originally from Ecuador, "Maria" married an American citizen who abused her. After separating from her husband, she needed legal assistance to obtain employment authorization so that she could support her 2-year-old daughter. Her initial application for permanent resident status had been denied, but Legal Aid filed a request for reconsideration and submitted additional evidence to U.S. Citizenship and Immigration Services, and the decision was reversed. She is now a long-term legal resident of the United States capable of providing a home for herself and her child.

*Northwest Florida Legal Services, Pensacola*

## 89,720 Cases Closed in 2012



## Family Matters:

(adoption, custody/visitation, dissolution of marriage, guardianship/conservatorship, paternity, spouse abuse)

"Clara," a mother of six, came to Legal Aid seeking help with a divorce. It turned out she and her children had been severely physically abused by Clara's husband. After Clara had put her husband through plumbing school and certification by working two jobs, she learned that her children were being abused while she was working. The older children were forced to hold down the younger ones while their father beat them. If they refused, they would also be beaten or have food withheld. When Clara came to Legal Aid she was facing eviction. Through a divorce action, her legal aid attorneys obtained a court order granting Clara assistance in maintaining her home and an order for \$800 a month in child support through an income deduction order. Clara and her children have since been able to create a new life for themselves free of abuse.

*Gulfcoast Legal Services, St. Petersburg*

## Housing:

(federally subsidized housing rights, homeownership/real property, landlord/tenant, public housing)

Elderly and disabled, "Annie" fell behind on her mortgage payments after a "foreclosure rescue company" tricked her into deeding her home to them. As a result, she lost her homestead tax exemption and her senior citizen tax discount and fell further behind on her payments. Legal Aid defended Annie in a foreclosure suit, filing a counter-suit against the foreclosure rescue company to get title to the property placed back in her name. Legal Aid negotiated a loan modification with the bank, and the judge dismissed the foreclosure action. Title to the property was again placed in Annie's name. She is now current on her mortgage payments, and her homestead exemption and senior citizen tax discount have been restored, enabling her to remain in her home.

*Florida Rural Legal Services, Lakeland*

## Legal aid project helps break the cycle of dependency

**A**manda Alvarez, 18, comes across as a high school grad who racked up a long list of achievements.

She has the poise, diction and vocabulary of a student council president. With her long, dark hair, tasteful makeup and neat-as-a-pin pencil skirt, she has the grace and style of a homecoming queen. She appears so put-together, in fact, that the reality of her high school career is almost unfathomable.

It lasted all of one month before she was kicked out. And that wasn't the first time. In spite of a 3.9 grade point average, she was expelled in the eighth grade.

"I would get suspended and then come back and ace the test," Alvarez said. "I've always been intellectual."

But it's hard to be the all-American girl when your father is in prison and your mother is abusing drugs and getting you hooked, too. At 17, instead of picking out her prom dress, Alvarez was incarcerated and pregnant. She faced the distinct possibility of losing her baby in two ways. First, she had a high-risk pregnancy, eventually giving birth to a 1-pound, 7-ounce baby girl. Second, she was facing charges that could have resulted in her baby going into the care of the Florida Department of Children and Families.

Enter Ashley Wilson, an Equal Justice Works Fellow funded by The Florida Bar Foundation and the law firm of Greenberg Traurig. Wilson developed a project at the Legal Aid Society of Palm Beach County that provided legal advocacy for Alvarez and 71 other teenage mothers.

Later as a staff attorney Wilson convinced the judge at Alvarez's delinquency hearing that she should be released to a group home and given the right to visit her baby Liliana during the months she was at the hospital.

Besides being by Liliana's side in the neonatal intensive care unit, Alvarez has done everything in her power to get her life in order and provide a stable environment for her child.



Amanda Alvarez and her daughter Liliana are together thanks in large part to the help of legal aid attorney Ashley Wilson, left, and her project to help teen moms.

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She passed her GED test, scoring in the 99th percentile. Through Wilson's advocacy she was able to enroll in college and receive Road to Independence benefits that cover tuition for former foster youth. A parade of different caseworkers had failed to complete the paperwork for Alvarez to take the GED, so Wilson got a court order requiring them to do it.

Alvarez is one of dozens of success stories from Wilson's Legal Advocates for Minor Mothers Project (LAMMP), which had its roots in a Public Service Fellowship grant made to the FSU College of Law.

LAMMP seeks to break the cycle of dependency and delinquency by helping teen mothers and babies get the services they need to be self-sufficient. Wilson points out that if Alvarez had been separated from Liliana, the baby would have entered the dependency system, potentially creating 18 years or more of costs to the state, starting the cycle anew.

And for Alvarez, there is no telling what would have come next.

"Honestly I would have probably had no motivation," she said. But with Wilson advocating for her, she had the support to make the right choices.

*"I don't want to be a repeat in the cycle," Alvarez said. "Of all the kids that go into foster care, there aren't that many who end up well because of the quality of their childhood. Mine just got changed at the end. So, I got more motivation than I would have been able to conjure up on my own. There were cracks in the sidewalk for me, and legal aid filled those cracks. If they were to take legal aid away or not support it, there wouldn't be stories like mine."*

# Children's Legal Services Grants

Since the early 1990s, The Florida Bar Foundation has funded special annual grants for legal assistance to children. Gifts from attorneys to the Foundation from the Children's Legal Services campaign on the annual Florida Bar Fee Statement help support these grants, along with proceeds from The Florida Bar's Kids Deserve Justice license plate initiative. The Foundation's priorities for its Children's Legal Services grants include representation of foster youth and access to special education, medical, developmental and mental health services that are required under law.

Grantee	2012-13 Award
Americans for Immigrant Justice <i>Miami</i> Children's Legal Project	\$34,195
Bay Area Legal Services <i>Tampa</i> L. David Shear Children's Law Center	\$71,957
Brevard County Legal Aid <i>Rockledge</i> Independent Living Project	\$41,268
Community Law Program <i>St. Petersburg</i> Transitioning Dependent Youth Project	\$80,000*
Community Legal Services of Mid-Florida <i>Daytona Beach</i> The Child Advocacy Project	\$76,454
Dade County Bar Association Legal Aid Society <i>Miami</i> Teen Legal Collaborative Project (Jointly with Lawyers for Children America)	\$44,973*
Florida Equal Justice Center Schoolhouse-Safehouse	
Florida Institutional Legal Services <i>Newberry</i> Children in Custody Project	\$47,725
Florida International University College of Law <i>Miami</i> Children's Education Advocacy Clinic	\$49,470
Florida's Children First <i>Coral Springs</i> Florida's Children First Children's Systemic Initiatives	\$124,504
Florida Legal Services, Inc. <i>Tallahassee</i> Children's Statewide Litigation and Policy	\$69,709

\* The Community Law Program is the beneficiary of a \$75,000 gift from The Florida Bar Trial Lawyers Section to fund the Trial Lawyers Section Children's Legal Services Fellow.

Florida State University College of Law Public Interest Law Center <i>Tallahassee</i> Health Care Access/ Special Education Project	\$69,709
Gulfcoast Legal Services <i>St. Petersburg</i> GLS CHILD (Children's Immigration Legal Defense)	\$31,481
Jacksonville Area Legal Aid <i>Jacksonville</i> Crisis in Duval Foster Care Education Systems Project	\$35,979
Lawyers for Children America, Inc. <i>Miami</i> Teen Legal Collaborative Project (Jointly with Dade County Bar Association Legal Aid Society)	\$44,973**
Lawyers for Children America, Inc. <i>Miami</i> Miami Youth S.H.I.N.E. Project (Striving High for Independence and Empowerment)	\$46,686
Legal Aid Service of Broward County <i>Plantation</i> Children's Advocacy Program Education Legal Rights Project, Broward and Collier	\$60,714
Legal Aid Society of Palm Beach County <i>West Palm Beach</i> Children's Educational Advocacy Law Project	\$62,962
Legal Aid Society of the Orange County Bar Association <i>Orlando</i> Guardian Ad Litem Project	\$60,264
Legal Services of Greater Miami <i>Miami</i> Special Education Advocacy Project	\$25,455
Legal Services of North Florida <i>Tallahassee</i> Children's Legal Representation Project (CLRP)	\$52,169
Southern Legal Counsel <i>Gainesville</i> Education Advocacy Project	\$67,460
University of Miami School of Law Children & Youth Law Clinic <i>Coral Gables</i> Statewide Foster Children's Advocacy Project	\$52,855
<b>TOTAL</b>	<b>\$1,300,000</b>

# Legal Assistance for the Poor Grant Program



## Affordable Housing Grants

The Foundation has sought to make an impact on the affordable housing crisis for low-income individuals and families through the implementation of a statewide-regional affordable housing project. The goal of the project is to undertake systemic advocacy to prevent the loss of affordable housing units and to support the development of new affordable housing units. Grants support multi-forum legal advocacy, including legislative advocacy, administrative advocacy, public policy advocacy and litigation on a statewide and local level. In 2012-13, the Foundation provided \$390,000 in affordable housing grants to four regional projects, as well as a \$150,000 grant to Florida Legal Services for its work on affordable housing.

## Statewide Special Project Grants

The following grants were made to support statewide initiatives on behalf of the legal aid community.

Project	2012-13 Award
<p><b>Statewide Immigration Component</b> (administered by Americans for Immigrant Justice) Provides training and technical assistance to other immigration projects in Florida and provides some assistance to immigrants in areas of Florida not covered by any immigrant programs.</p>	<b>\$99,642</b>
<p><b>Florida Senior Legal Helpline</b> (administered by Bay Area Legal Services) Provides support for expanded access to legal aid statewide by Floridians aged 60 and over by providing callers free legal advice, brief services and referrals by telephone.</p>	<b>\$29,575</b>
<p><b>Statewide Website</b> (administered by Florida Legal Services) Internet-based resources provided to Foundation-funded legal aid and legal services advocates, volunteer attorneys who provide pro bono assistance to the poor, and members of the client community who need access to self-help legal information and referrals to Foundation legal aid grantee organizations.</p>	<b>\$141,600</b>
<p><b>Statewide Pro Bono Project</b> (administered by Florida Legal Services) Provides staff support for the work of The Florida Bar Standing Committee on Pro Bono Legal Service. Of these grant funds, \$50,000 comes from The Florida Bar.</p>	<b>\$146,000</b>
<p><b>Statewide Supplemental Training Funds</b> (administered by Florida Legal Services) Provides support for organized statewide training events for staff members of Foundation-funded legal aid programs.</p>	<b>\$98,000</b>
<p><b>Migrant Component</b> (administered by Florida Rural Legal Services) This project, funded primarily by Legal Services Corporation, receives Florida Bar Foundation funding to help support services provided to eligible migrant farmworkers under federal regulations, assisting with wage claims, landlord-tenant matters and other housing issues.</p>	<b>\$33,715</b>
<p><b>University of Miami School of Law Children &amp; Youth Law Clinic</b> (Funds made available by the Batchelor Foundation. Granted to Miami Law in honor of Burton Young) The clinic represents children in foster care and former foster youth in dependency, health care, mental health, disability, independent living, education, immigration and other general civil legal matters, ensuring that they have a voice in court proceedings. (see article on opposite page)</p>	<b>\$100,000</b>
<b>TOTAL</b>	<b>\$648,532</b>

## Small Program Special Needs Grants

The purpose of this competitive grant program is to recognize and support small legal assistance programs with a long history of providing legal representation to special needs clients. The recipients are programs not otherwise supported by a Foundation grant. In 2012-13 the Colombian American Service Association and HIV, Education and Law Project (HELP) Inc. received a total of \$64,610.

## Attorney General Mortgage Foreclosure Defense Grant Program

In 2009-10, The Florida Bar Foundation initiated a mortgage foreclosure defense grant program using funds provided by then-Florida Attorney General Bill McCollum from settlement of a class action lawsuit against Countrywide Financial Corporation. More than \$4 million was made available over the first two years, with another \$1 million awarded to 17 grantees in 2011-12 through a settlement reached by McCollum's successor, Florida Attorney General Pam Bondi, in a different case. An additional \$462,630 from yet another settlement reached by Bondi's office was awarded to the same 17 grantees in 2012-13. The grants have funded lawyer and paralegal positions devoted to providing free assistance to low-income homeowners facing foreclosure on their homestead property. The Foundation distributed the funds through annual grants to legal aid organizations according to the number of area foreclosures.

## Florida Access to Civil Legal Assistance Act Grants

The Florida Access to Civil Legal Assistance Act (FACLA) was passed by the Florida Legislature and signed into law by Fla. Gov. Jeb Bush in 2002. The free civil legal assistance FACLA has provided to low-income Floridians has furthered the goals of the act to stabilize lives, provide independence and self-sufficiency, and secure protection from domestic violence and abuse. According to a Florida TaxWatch study of 2008-09 FACLA-funded legal services, state dollars generated \$13.86 of economic impact for every \$1 spent on legal aid by the state for FACLA funding. In the 2013 legislative session, \$1 million was appropriated by the Florida Legislature to the unique public-private partnership formed under the act and administered by The Florida Bar Foundation. However, for the third year in a row, the FACLA appropriation was later vetoed by Fla. Gov. Rick Scott.

## Batchelor Foundation funds directed to Miami Law's children's clinic

In support of legal advocacy for Florida's foster children, The Florida Bar Foundation awarded a grant of \$100,000 toward Miami Law's Children & Youth Law Clinic in 2013 through funds made available by the Batchelor Foundation. The grant honors Miami Law alumnus and past Florida Bar Foundation President Burton Young.

Professor Bernard Perlmutter, co-director of the Children & Youth Law Clinic, said the award came at a time when The Florida Bar Foundation's grants are being significantly reduced because of a steep drop in revenue from Florida's Interest on Trust Accounts program, the chief source of funds for the Bar Foundation's grants.

"So in a year when we were expecting a 28 percent cut in the Bar Foundation's grant for our Statewide Foster Children's Advocacy Project, the Batchelor Foundation's gift is an act of great generosity that will help us to continue our 17 years of advocacy for Florida's foster children," Perlmutter said.

Young was instrumental in making the award a reality. The late George Batchelor, an aviation pioneer who

established the foundation, was a good friend and client of Young's. Young had asked the Batchelor Foundation to make the funds available to the Bar Foundation for legal services for children. The Batchelor Foundation directed the funds to the Children & Youth Law Clinic.

The first Jewish-American president of The Florida Bar, Young is a longstanding champion for the underserved, whether through pro bono work or by leading the charge to establish fairer legal standards.

"We are incredibly grateful to Mr. Young, the Batchelor family, and The Florida Bar Foundation for their support of our legal advocacy on behalf of the most vulnerable persons in our state – child victims of parental abuse and neglect placed in foster care, and young adults who have aged out of foster care," Perlmutter said.

The Batchelor Foundation, based in Miami Beach, has supported many programs at the University of Miami. The foundation supports organizations involved with arts and culture, education, the environment, animals and wildlife, health, human services, and economically



Burton Young

disadvantaged people.

The Children & Youth Law Clinic primarily assists current and former foster youth in matters of dependency, health care, mental health, disability, independent living, education, immigration and other civil areas, ensuring that they have a voice in court proceedings. The Statewide Foster Children's Advocacy Project has been funded by The Florida Bar Foundation through the Children's Legal Services grant program for 10 years.

# Fostering Public Service Careers

The Florida Bar Foundation offers a number of programs through its Legal Assistance for the Poor grants to encourage law school graduates to choose and remain in public interest careers. This includes providing matching funds for Equal Justice Works Fellows who spend two years working on public service projects, as well as providing loan repayment assistance and salary supplementation to legal aid attorneys employed at Foundation-funded legal aid programs throughout Florida.

## Equal Justice Works Fellowship Program

Over the last 15 years, The Florida Bar Foundation and its funding partners have provided matching funds for 70 Florida Equal Justice Works Fellows, who complete two-year public interest fellowships sponsored by the Washington, D.C.-based Equal Justice Works. The Foundation is the second largest all-time funder of EJW Fellows, with \$2.7 million in funding provided since 1999 to Fellows hosted by Foundation-funded legal assistance organizations. EJW Fellows have designed and led legal assistance projects in affordable housing, welfare-to-work, domestic violence, special education, homelessness, immigration, prisoner rights, environmental justice and family preservation. A 2012 report by Equal Justice Works found that 81 percent of Florida's EJW Fellows continue to work in public interest employment, and 68 percent remain in Florida. In addition to addressing the civil legal needs of the poor in Florida, the EJW 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 2012-13, the Foundation approved matching funds for two Fellows in the Class of 2013-15 and was joined by its funding partners, the law firm of Greenberg Traurig and The Florida Bar.

### Equal Justice Works Fellowships Class of 2013-15

Host Legal Aid Program	Fellow	Project
Coast to Coast Legal Aid of South Florida	Amanda Sejba	Facilitate a Medical Legal Partnership and provide legal advocacy and representation to Broward County veterans and military personnel to assist them in receiving disability and veteran's benefits.
Legal Aid Society of Palm Beach County	Alexandra St. Pierre	Provide holistic direct representation and systemic legal advocacy to youths as they age out of the foster-care system and transition to early adulthood in order to preserve legal rights and ensure a more successful transition into independence.

## Loan Repayment Assistance Grant Program

The majority of law students today graduate with educational debt of more than \$100,000. In 2007 the Foundation released the results of an in-depth study titled, "The Quest for the Best: Attorney Recruitment and Retention Challenges for Florida Civil Legal Aid," which found that one of the top three reasons attorneys were leaving public service careers was "financial pressure due to student loans." The study noted that salary increases alone would not be adequate to alleviate the burden of debt payments on legal aid attorneys. In response, the Foundation strengthened its Law School Loan Repayment Assistance Program, which now pays legal aid attorneys up to 80 percent of their annual payments on need-based law school debt for up to 10 years. Annual payments are capped at \$7,500 and are in the form of one-year loans forgiven annually for attorneys who remain employed at a Foundation legal assistance grantee for the full 12-month period. In 2012-2013, the Foundation committed \$711,293 to the program for benefits to 175 legal aid attorneys.

# Staff Attorney Salary Supplementation Grant Program

The 2007 “Quest for the Best” study found that the median starting salary for a licensed attorney in a Florida legal aid program was \$38,500 and that staff attorneys did not reach a salary of \$50,000 until nine years after law school graduation. Common measures of a middle class lifestyle, such as home ownership, proved beyond the reach of many legal aid attorneys in spite of their highly specialized skills. The study also found that “financial pressure due to low salary” was the number one reason legal aid attorneys left their jobs. In accordance with the recommendations of the study, The Florida Bar Foundation developed a plan to help increase staff attorneys’ starting salaries beginning Jan. 1, 2008 to a minimum of \$43,500 with an increase to a minimum of \$46,000 in 2010. It also established goals that attorneys with three years, six years and 10 years of experience would be earning a minimum of \$50,000, \$60,000 and \$70,000 respectively by 2010. To enable legal aid programs to implement these salary improvements, along with other professional development enhancements recommended by the study, the Foundation initiated a Staff Attorney Salary Supplementation Grant Program in 2008 for its general support grantees. In 2012-13, the Foundation awarded salary supplementation grants totaling \$4,085,965 to 29 legal aid programs.

## Law Student Assistance Grant Program Suspended

The Florida Bar Foundation made the difficult decision in 2011-12 to suspend its Law Student Assistance grant programs in order to conserve funds for legal aid in the face of the steep and protracted decline in revenue from Florida’s Interest on Trust Accounts (IOTA) Program. The Foundation hopes to reinstate these grant programs once IOTA revenue has fully rebounded and legal aid funding has been substantially restored to pre-recession levels. The programs that have been suspended are as follows:

### Legal Aid Summer Fellowship Grant Program

An 11-week program that places first- and second-year law students at Foundation-funded legal assistance programs, Legal Aid Summer Fellowships have long provided additional client service while encouraging law students to enter public service careers and undertake pro bono representation in private practice. The Foundation at one time funded 40 summer fellows a year, but had decreased the number to 20. In 2011-12 it suspended its funding for the program.

### Public Service Fellows Grant Program

Through the Public Service Fellows Program, law students completed internships at legal aid offices, Guardian ad Litem programs and public defender offices, as well as human rights and other public service agencies. The program was established to promote pro bono legal services among future members of the legal profession, to provide law students with direct involvement in public service activities and to promote the concept of public service legal work on law school campuses. The grants were awarded to law schools, which distributed the funds to students in the form of stipends. The Public Service Fellows Grant Program was suspended in 2011-12.

### Law School Civil Clinic Grant Program

The Florida Bar Foundation has helped support civil clinics at Florida law schools in an effort to:

- involve law students in the provision of civil legal assistance to the poor;
- provide an in-depth experience in representing the poor and working with individual clients and client groups in civil legal matters;
- encourage law students to pursue public interest careers representing the poor; and
- promote a commitment to pro bono representation of the poor.

Cases handled through the clinics are predominantly in the areas of family law, children’s legal services, homeless advocacy, public benefits (food stamps, Medicaid), immigration, community outreach and education. The Law School Civil Clinic Grant Program was suspended in 2011-12.

# Legal services icon Paul Doyle retires



PETER CROSS

Paul Doyle reflected on his 22 years as director of legal assistance for the poor and law student assistance grant programs at the Foundation's 37th Annual Reception and Dinner.

**A**fter 40 years at the forefront of local, statewide and national efforts to strengthen systems for providing civil legal services to the poor, Paul C. Doyle, 77, a graduate of Harvard Law School, retired June 30.

"The impact Paul has had on access to justice is profound," said Jane Curran, executive director of The Florida Bar Foundation, where Doyle served as director of legal assistance for the poor and law student assistance grant programs for the last 22 years. "He has led the legal services community here in Florida and nationally to a higher standard, all the while garnering greater support and better results."

In 1990, The Florida Bar and The Florida Bar Foundation formed the Joint Commission on the Delivery of Legal Services to the Indigent in Florida to determine how best to employ the large increase in Interest on Trust Account (IOTA) funds that were becoming available to The Florida Bar Foundation as a result of Florida changing its IOTA program to mandatory. Under the IOTA Program, also known as Interest on Lawyers' Trust Accounts (IOLTA), the interest earned on client funds held in lawyers' trust accounts is used for the public good unless the funds can otherwise earn income for the

client or third person in excess of the costs incurred to secure such income. The joint commission also developed The Florida Bar's current pro bono rules, which became a model for other states.

Doyle was called on to staff and lead this historic undertaking. After the joint commission issued its report in 1991, Doyle joined the staff of The Florida Bar Foundation to lead advancements in the state's civil legal assistance delivery system based in large part on the commission's recommendations.

"In his position with the Foundation, his leadership has guided all of Florida's legal services programs to maximize their capacities as advocates for justice for the poor. His calm leadership and devotion to equal justice will be missed by all in the justice system," said Judge William A. Van Nortwick Jr. of the First District Court of Appeal.

When the Foundation and the more than 30 Florida legal aid organizations it helps fund had to adapt to sweeping changes brought about by the restrictions Congress placed on the Legal Services Corporation in the 1990s, Doyle again led the way.

He commissioned studies and conducted assessments to identify needs, as well as the barriers to meeting those

needs. After careful analysis, he established new grant programs to help recruit and retain legal services attorneys and to provide for the special legal needs of children, among other innovative solutions.

On the national level, Doyle counseled IOLTA programs on developing their legal aid grant programs and on peer review systems to assess and strengthen the work of their grantees.

When the Florida Legal Services building in Tallahassee was dedicated as the Paul Doyle Justice Center in 2009, Doyle said the most important word in its name was "justice."

"For the poor, justice is not vague or dispassionate, general justice for all, but a living, ambitious, sometimes controversial and dedicated quest," Doyle said.

A powerful leader in the quest for justice, Doyle began his public service in the General Counsel's office of the city of Jacksonville, where he focused his work on improving opportunities for families in public housing. He embarked in the 1970s on his life's work of leading movements to expand access to civil legal assistance for the poor and disadvantaged. His commitment to legal services began when he was tapped by leaders of the Jacksonville Bar Association to serve as executive director of the Duval County Legal Aid Association, which he expanded into Jacksonville Area Legal Aid.

After building Jacksonville Area Legal Aid into a preeminent multi-county legal aid program, he went on to serve as executive director of Legal Services of Upper East Tennessee, and then of Florida Rural Legal Services before joining The Florida Bar Foundation.

Kent Spuhler, executive director of Florida Legal Services, called Doyle "a quiet, brilliant and humble leader."

"He never lost the vision of equal justice and instilled a passion and dedication to justice for the poor and disadvantaged in all who had the privilege to work and be mentored by him through his many years of service to others," Spuhler said.

# 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 five 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;
- Promotion and support for public interest legal representation; and
- Promotion and support for voluntary bar association-sponsored community-service initiatives.

The Foundation occasionally considers 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, or programs for which there is a governmental responsibility to provide funding and continuing program support. Due to the lack of IOTA revenue, the Foundation limited its Improvements in the Administration of Justice grants to several ongoing projects in 2011-12. It is expected that the grant program will be restored to prior funding levels once IOTA revenue fully rebounds.

Grantee	2012-13 Award
<b>Florida Law Related Education Association</b> General Support	<b>\$180,000</b>
<b>Florida Law Related Education Association</b> Justice Teaching Institute	<b>\$28,000</b>
<b>Innocence Project of Florida</b> General Support: \$282,516 Exoneree Emergency Fund: \$12,000*	<b>\$294,516</b>
<b>TOTAL</b>	<b>\$502,516</b>

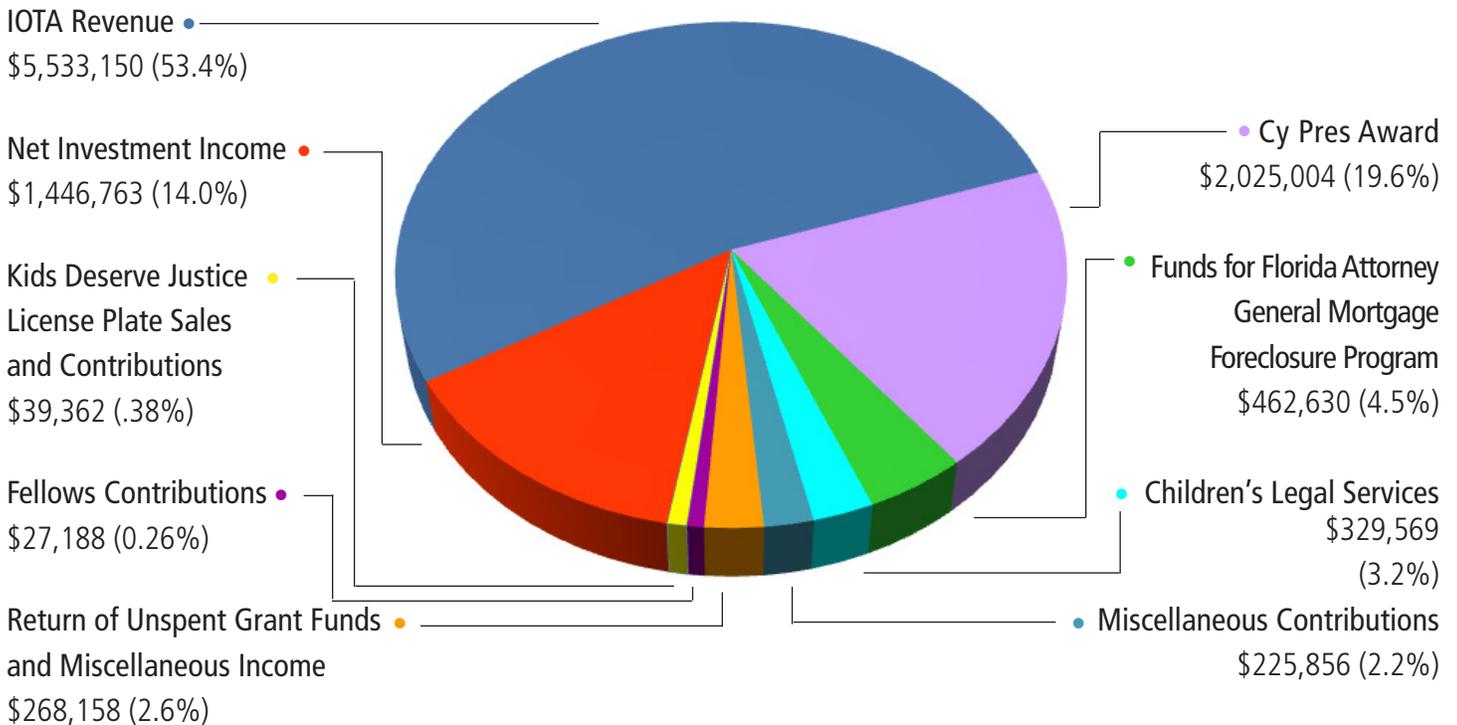
\* requires a dollar-for-dollar match

## Voluntary Bar Association Community Service Grant Program

The Foundation has suspended its Voluntary Bar Association Community Service Grant Program, which used to give grants of up to \$5,000 each to voluntary bar associations in Florida to promote new or significant improvement in existing charitable, community-service projects. The Foundation expects to reinstate this grant program once IOTA revenue has fully rebounded and legal aid funding has been substantially restored to pre-recession levels.

# Financial Information

## 2012-13 Revenues \$10,357,680



## Be Sure to Thank Your Banker

September 1981 marked implementation by the Florida Supreme Court of the country's first IOTA Program and the beginning of an important source of support for civil legal assistance to the poor, projects to improve Florida's justice system and programs to promote public service by law students. While we often mark that milestone and thank those responsible, we don't publicly recognize often enough Florida's banking community. IOTA works because of the support and cooperation of Florida banks – from the superb bank staff who make sure monthly remittance information and interest gets to the Foundation, to the teams who worked so closely with the Foundation to implement the interest rate comparability rule, to the leaders of the Florida Bankers Association who step up to the plate and help IOTA achieve its full potential. The Foundation, its grantees and those they serve are very grateful for the successful partnership between the legal and banking communities that is Florida's IOTA Program.

## The Foundation Thanks You

Several attorneys, law firms and other individuals and organizations contributed to our success in 2012-13 through pro bono services and other in-kind support of the Foundation itself. In particular, we would like to thank:

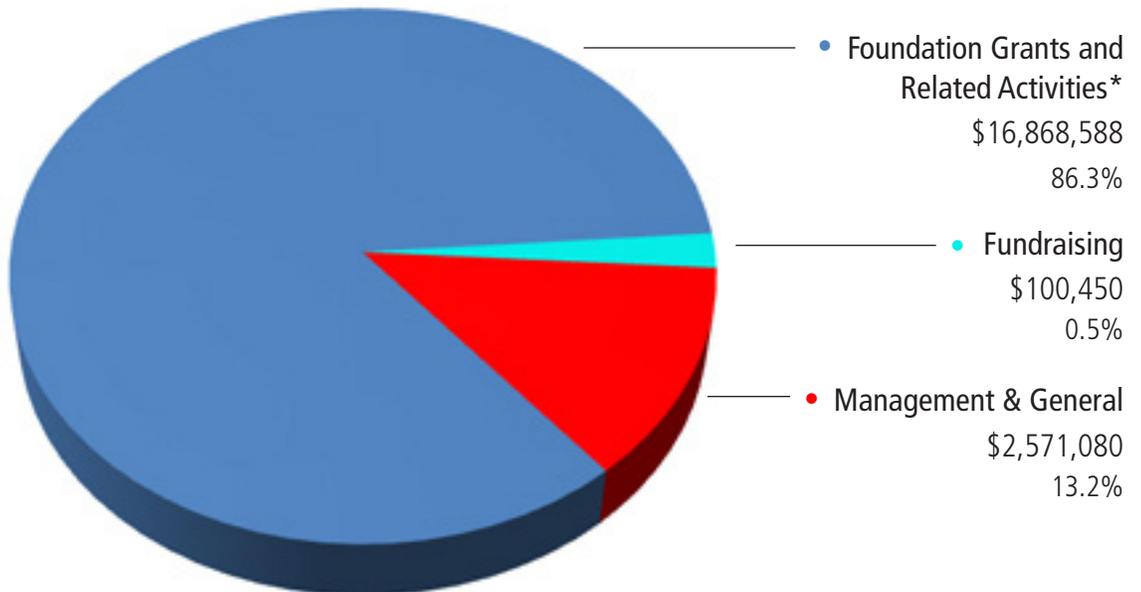
Matthew Brenner  
Lowndes, Drosdick, Doster, Kantor & Reed, P.A., Orlando

Ava K. Doppelt  
Allen, Dyer, Doppelt, Milbrath & Gilchrist, P.A., Orlando

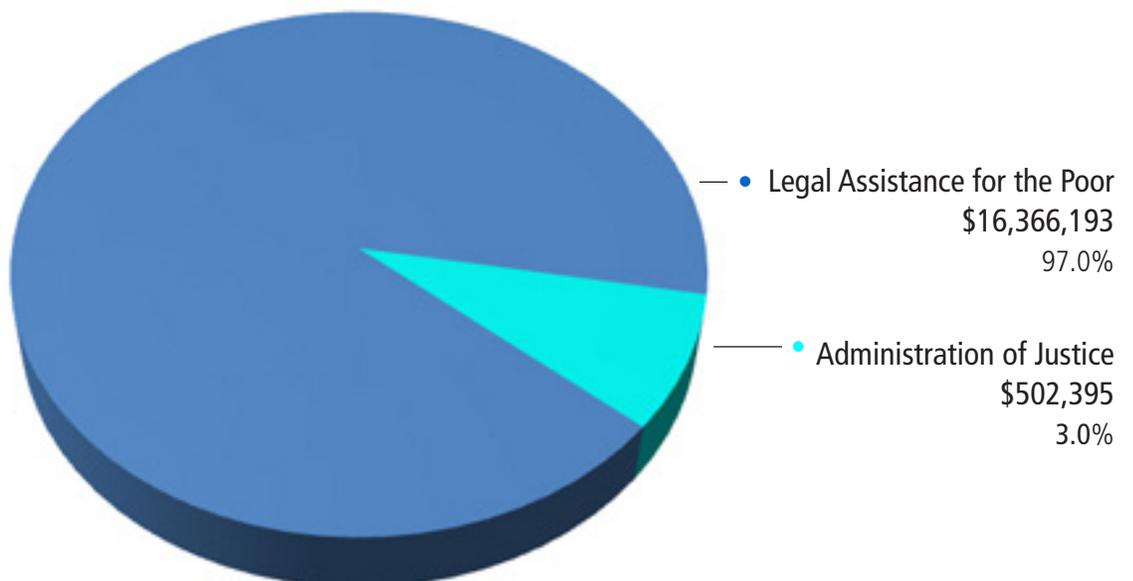
Donald Carlton Works, III  
Jackson Lewis, Orlando

# 2012-13 Fiscal Year

## 2012-13 Expenses \$19,540,118



## 2012-13 Breakout of Grants & Related Activities\* \$16,868,588



Management and general and fundraising expenses represent 13.7% of the Foundation's total expenses in 2012-13.

Audited financial statements and the IRS Forms 990 for both the Foundation and The Florida Bar Foundation Endowment Trust are available on the Foundation's website at [www.floridabarfoundation.org/finance](http://www.floridabarfoundation.org/finance).

\* Foundation grants are based upon the net revenues of the fiscal year preceding the year being reported. These amounts may differ from the grants listed elsewhere in this report due to conditional and multi-year grants.

# Investing in Access to Justice

The Florida Bar Foundation was fortunate in 2012-13 to receive several major gifts that helped soften grant reductions resulting from slumping revenue from Florida's Interest on Trust Accounts (IOTA) Program.

As always, The Florida Bar has led the way. Its Young Lawyers Division has taken a leadership role with its second consecutive gift of \$100,000 to the Foundation, while the Trial Lawyers Section made its second consecutive \$75,000 gift to fund the Trial Lawyers Section Children's Legal Services Fellow. Contributions from Florida Bar members to Children's Legal Services meanwhile were up 28 percent in 2013, with gifts of \$275,598 coming through The Florida Bar annual fee statement and directly to the Foundation.

We are extremely grateful to 2012-13 Florida Bar President Gwynne Young and 2013-14 President Eugene Pettis, who have garnered greater support for the Foundation from Bar members.

A \$100,000 contribution from the Batchelor Foundation is helping support

the Children & Youth Law Clinic at the University of Miami School of Law, one of the Foundation's Children's Legal Services grantees. The clinic's Statewide Foster Children's Advocacy Project has been funded by The Florida Bar Foundation through its Children's Legal Services grant program for 10 years. This year's grant honors Past Florida Bar Foundation President and Medal of Honor Award recipient Burton Young.

Finally, we thank Akerman LLP for its generous gift of \$10,000 in memory of Jim Foster, a highly respected member of the firm. Akerman designated its gift for Children's Legal Services as well.

These gifts are so important at this critical time, and we hope our generous donors will continue to help bridge the gap until interest rates rise and IOTA revenue returns to a level that can better support Florida's legal aid organizations. Always vital to the fulfillment of the Foundation's mission, charitable gifts can be designated for current grant programs or can be added



to The Florida Bar Foundation Endowment Trust as a permanent source of support. We ask that you help sustain the work of the Foundation by making your investment in access to justice one of the priorities in your charitable giving. To learn more about charitable giving opportunities at the Foundation, please contact me.

A handwritten signature in black ink that reads "Jane Curran".

Jane Curran, Executive Director  
jcurran@flabarfdn.org  
(800) 541-2195 (Toll-free in Florida)  
(407) 960-7000

## Our Network of Philanthropic Support

Thousands of individuals and organizations have supported The Florida Bar Foundation with their charitable gifts. For many of them, their support for the Foundation has blossomed from their original Fellows gift into an ongoing commitment as part of a personal philanthropic tradition.

In gratitude for their dedication, and for their commitment to the Foundation's sustained success over time, we acknowledge our generous donors for both their lifetime (cumulative) giving and for their gifts in the most recent fiscal year.

Our Lifetime Giving Societies pay tribute to the members at each giving

level, recognizing the generosity they have shown since they made their first Foundation gift. Our Annual Giving Circles represent gift totals in the fiscal year ending June 30, 2013. The Fellows list documents the name of every person who, with his or her pledge of \$1,000, has committed to become a life member of the Foundation. Finally, our Legacy for Justice members have chosen to create a personal legacy on behalf of the Foundation with a significant commitment of resources to help sustain the Foundation's future.

The Foundation is also grateful for the many gifts made through the annual

Florida Bar Fee Statement and End-of-Year campaigns for Children's Legal Services, as well as those made in tribute or in memory of friends and loved ones. For their philanthropic support, which has become so important to the Foundation's mission, we salute our donors. They are recognized individually on our website under:

Legacy for Justice  
Lifetime Giving Societies  
Annual Giving Circles  
Children's Legal Services Campaign  
Tribute & Memorial Gifts  
Fellows

For a complete listing of donors to The Florida Bar Foundation, go to:

[www.floridabarfoundation.org/donors](http://www.floridabarfoundation.org/donors)

## The Legacy for Justice

For a special group of dedicated supporters, the mission of The Florida Bar Foundation is of such great personal importance that they have chosen to make a significant commitment of resources to help ensure that the Foundation's work can be sustained well into the future. The Legacy for Justice recognizes those who have either included the Foundation in their estate planning, made a pledge of \$10,000 or more, directed a significant cy pres award to the Foundation, or facilitated a major gift. We offer the members of this prestigious group our sincerest gratitude for their deep and abiding commitment to the Foundation.

Louie Adcock\*  
 Akerman Senterfitt LLP  
 Anonymous Fund Community Foundation of Central Florida  
 Anonymous Fund Community Foundation of Sarasota County, Inc.  
 Tod Aronovitz\*  
 James L. Bell\*  
 Bruce B. Blackwell\*  
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 Holland & Knight LLP  
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 Laird A. Lile\*  
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 Russell Troutman\*  
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 Hon. William A. Van Nortwick, Jr.\*  
 Robert Craig Waters\*  
 Hon. John D. Wessel\*  
 John Yanchunis\*  
 Burton Young\*

\*\* Fellow  
 \* Deceased

## Legislature and Cabinet offered support for legal aid, foreclosure assistance

We are extremely grateful that Senate President Don Gaetz, House Speaker Will Weatherford, Rep. Charles McBurney and Sen. Rob Bradley helped ensure that \$1 million in funding for the Florida Access to Civil Legal Assistance Act was brought to the attention of the budget committees and appropriated in the 2013-14 budget approved by the Legislature. Unfortunately, this appropriation was later vetoed by Fla. Gov. Rick Scott along with hundreds of millions of dollars for other projects.

In addition, the Foundation continued its administration of the Attorney General's Mortgage Foreclosure Defense Fund, which originally directed a portion of the settlement of former Attorney General Bill McCollum's lawsuit against Countrywide Financial Corporation to foreclosure legal assistance grants. The fund initially

provided more than \$4 million spread over two years and has since been continued through a separate \$1 million settlement reached by current Attorney General Pam Bondi in 2011 and a \$462,500 settlement her office obtained in 2012.

In addition, Attorney General Bondi advocated successfully to secure \$10 million in National Mortgage Foreclosure Settlement funds for foreclosure legal assistance beyond those funds administered by the Foundation. The legal aid community is grateful for this effort, which also had strong support from Sen. Darren Soto. Spread over two years, these additional funds will make it possible for legal aid organizations to serve significant numbers of low-income families striving to stabilize their lives, thus strengthening Florida communities.

This critical support from the Attorney General's office has helped The Florida Bar Foundation's grantees more effectively address the heightened needs for foreclosure legal assistance brought on by the recession. Even with its economy slowly rebounding, Florida continues to lead the nation in foreclosures. Meanwhile, even with severely limited resources, legal aid continues to address rising domestic violence, public benefits claims and other problems associated with families in economic distress.

The Foundation and Florida's legal aid organizations recognize the tremendous contributions of these important champions in the Florida Legislature and in the Cabinet who understand that Florida is stronger when it upholds the American promise of "justice for all."

## Governance

The Florida Bar Foundation is a charitable organization established in 1956 by The Florida Bar Board of Governors under the authority of the Florida Supreme Court. Its mission is to provide greater access to justice. Membership is open to all individuals interested in supporting the mission of the Foundation. 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 payments are charitable contributions to the Foundation. The Foundation is governed by a 33-member board of directors, which meets quarterly. The board conducts its work through standing and ad hoc committees. The board comprises 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), at least two but not more than four 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 board of directors at the request of the president, and include Foundation directors, members of the bar generally, and the lay public. An executive committee appointed annually by the board meets between meetings of the board.



Leadership and Funding for Justice in Florida

875 Concourse Parkway South, Suite 195  
Maitland, FL 32751

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[www.floridabarfoundation.org](http://www.floridabarfoundation.org)

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**Jane Elizabeth Curran**

**Every day, in every city in Florida,**

*we help legal aid help those least able to afford a lawyer.*

**We are The Florida Bar Foundation,**

*and we believe the justice system works best when it works for everyone.*



Leadership and Funding for Justice in Florida