

DESIGNING THE FUTURE

Florida Bar Foundation Annual Report
2014-15



THE FLORIDA BAR
FOUNDATION

1956-2016
YEARS **60**

The Florida Bar Foundation is designing the future. Dare to dream big with us.

In an era of extreme challenges, The Florida Bar Foundation is busy designing the future, recognizing that Florida needs new models for legal services delivery in order to live up to the words engraved above the entrance to the U.S. Supreme Court.

“Equal justice under law” is our national promise. But it is far from a national or statewide reality.

In an effort to change that, the Foundation is helping forge a new vision for legal aid and pro bono services in Florida. It has engaged its grantees, its partners, and leading national consultants in an effort to modernize, streamline and ultimately expand legal services in Florida, even at a time when fewer resources are available from the state’s Interest on Trust Accounts program.

Every day we dream of a future where our national promise is our national reality. And every day we do all in our power to make that dream come true. By design.

We hope you will dare to dream with us.

“If your actions inspire others to dream more, learn more, do more and become more, you are a leader.”

– John Quincy Adams



Mission

The mission of The Florida Bar Foundation, a charitable organization established in 1956 by The Florida Bar Board of Governors and the Florida Supreme Court, is to provide greater access to justice.

The Foundation accomplishes its mission primarily through funding of programs that:

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

**Message from 2014-15 President
Emerson R. Thompson, Jr.
Senior Judge, Fifth District Court of Appeal**

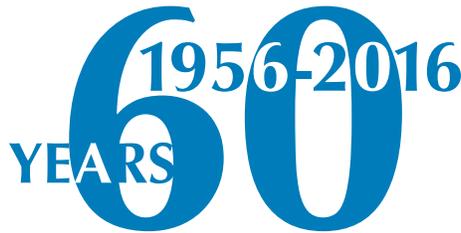
As The Florida Bar Foundation celebrates its 60th anniversary, we focus on the future. Why? Because what we collectively do as a society today will determine whether low-income Floridians with civil-legal problems will have access to the courts in the future.

The Foundation has accomplished much since its founding in 1956 to guarantee its mission of providing greater access to justice. Since 1982, it has distributed more than \$450 million in grants from Interest on Trust Accounts program revenue. Yet, the current economic challenge cannot be overstated. During the 2014-15 fiscal year, the Foundation's grant reserve, which reached \$88 million in 2007, was finally depleted. Meanwhile, the long-anticipated increase in Interest on Trust Accounts program revenue remained hostage to the Federal Reserve and the vagaries of the world economy until December 2015. A \$6 million loan from The Florida Bar and investment income from the Foundation's endowment now help keep the Foundation and its grantees afloat.

But we are far from being stuck in the doldrums waiting for the economic winds to blow us to the shores of fiscal prosperity. Rather, the Foundation – together with its grantees and other partners – is designing new approaches to sustainability.

As part of a strong alliance with The Florida Bar and the Florida Supreme Court, the Foundation helped establish the Florida Commission on Access to Civil Justice last fall. In one year this body of business, government, legal aid and other leaders has issued numerous recommendations for new and better ways to ensure equal access to our courts and legal system.

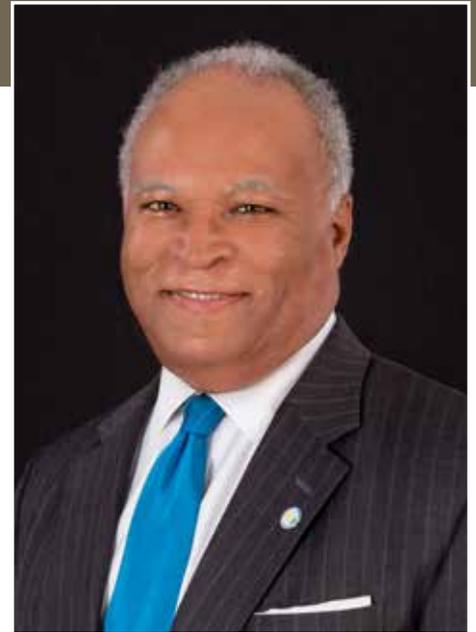
Florida Bar Foundation 2015-16 President Donny MacKenzie and I sit on the 27-member Commission. Several members of the Foundation's staff play key support roles. Further, the Foundation has leveraged \$2 million earmarked for technology under the Bar's loan to launch the Florida Justice Technology Center, which will help modernize Florida's legal services delivery system and bring some of the Commission's technology recommendations to fruition.



We have tapped into a strong base of support for our grant programs through major gifts from Florida Bar sections, which have contributed more than \$888,000 to the Foundation since the 2008 downturn. A number of lawyers, law firms and corporate partners have also supported the Foundation through sponsorship of its sold-out annual dinner, which raised nearly \$87,000 in 2015.

We are grateful for this support and for the dedication of Chief Justice Jorge Labarga and Florida Bar leaders to our common goal of ensuring civil justice for those who cannot afford it. Although our financial resources are limited, the Foundation has bright, forward-thinking leaders and staff who are dedicated to making good things happen.

On a personal note, I thank and recognize all those who have shaped and supported the Foundation during our 60 years. Most important to me is Jane Elizabeth Curran, the founding executive director.



Jane started at the Foundation with a checkbook and no staff. Under her tenure, she galvanized support for the Foundation and its work. She is charismatic, steadfast and dedicated to serving those with legal needs. Jane is the reason I became president of the Foundation. It was because of her encouragement and the example she set in her personal and professional life. I am reminded that the life she lives speaks for her commitment.

Her successor, Bruce B. Blackwell, is his own brand – one that for decades has stood for excellent lawyering, dedication to The Florida Bar and its highest aspirational goals, total commitment to legal aid and an inspirational personal life. He inherited a tough job, but he also inherited a staff and supporters of legal aid who will guarantee the Foundation will again reach its lofty prominence, enabling increased support to its 30-plus grantees.

Having given 20 years of service to the Foundation, spanning a third of its history, I say with pride and confidence to those just joining us that your support gives greater meaning to the phrase “justice for all.”

LEGAL AID MAKES GOOD ECONOMIC SENSE

Stabilizing families. Helping workers remain productive. Reducing the burden on government services.

Nearly 17 percent of Floridians live in poverty, including 24 percent — almost one in four — of the state's children. Meanwhile, more than 27 percent of Floridians are asset poor, lacking sufficient net worth to subsist at the poverty level for three months in the absence of income. This is not surprising given that about a third of Florida jobs are low-wage, meaning a full-time worker does not earn enough to keep a family of four above the poverty level.

Many low-wage jobs lack health benefits or paid sick leave, leaving families one medical or financial setback away from foreclosure or eviction. From national studies we know that one in four low-income Floridians can expect to have a civil legal problem in any given year, and these problems often spill over into the workplace. Without access to legal assistance, Floridians struggle under the weight of issues such as domestic violence, divorce, and the denial of federally guaranteed education or health-care services for special needs children.

These and other challenges with civil legal solutions can disrupt lives, increase worker absenteeism and stress, and lead to higher use of government services such as law enforcement and health and human-services programs.

By keeping Floridians in their homes, securing their livelihoods and protecting their rights to health-care, veterans' and other benefits, legal aid not only helps break the cycle of poverty, but also provides a significant return on investment for taxpayers and businesses, whose employees are more productive when they are not facing often-complex legal issues on their own.



27.2%

of Floridians are asset poor, meaning they lack the financial resources — money in the bank, assets in a home or car — to weather a job loss or other emergency such as a major illness.

Source: United Way ALICE Report: Florida, 2014

80%

of divorce cases in Florida had at least one pro se litigant.

Source: American Bar Association GP Solo Magazine, October/November 2005



51%

of tenants without lawyers in eviction proceedings lost their homes, compared to

21%

of tenants with lawyers.

Source: U.S. Department of Justice, Civil Legal Aid 101, citing randomized control trial.



\$108.1 million

in new economic activity resulted from federal benefits and grants obtained by legal aid in Florida, along with

2,648 jobs

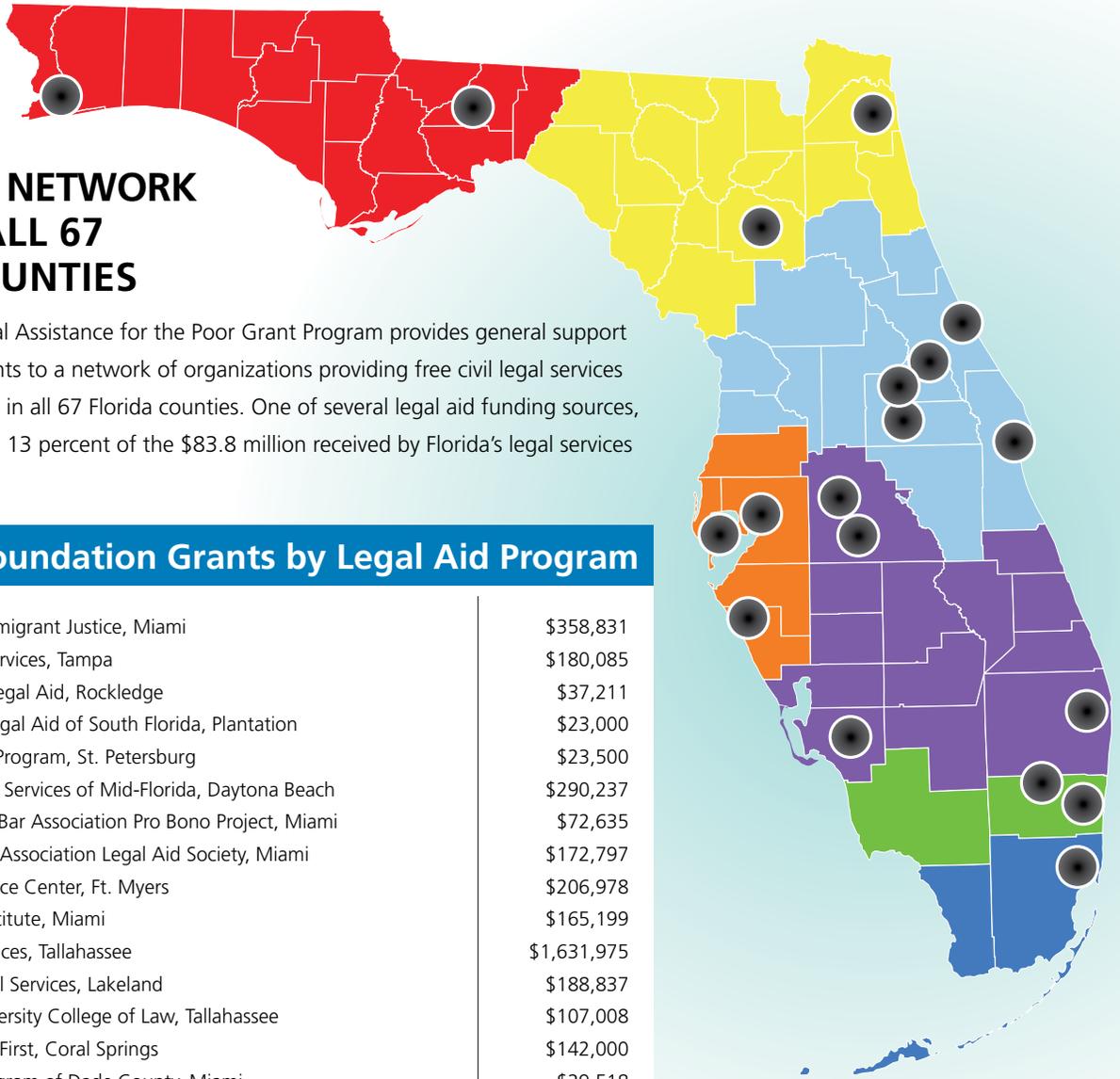
 in 2014.

Estimate based on \$40.1 million in federal benefits obtained for clients by legal aid advocates and \$30.1 million in federal grant funds to Foundation-funded legal aid organizations, with a standard 1.54 economic activity multiplier.



A LEGAL AID NETWORK COVERING ALL 67 FLORIDA COUNTIES

The Foundation's Legal Assistance for the Poor Grant Program provides general support and special purpose grants to a network of organizations providing free civil legal services to low-income Floridians in all 67 Florida counties. One of several legal aid funding sources, the Foundation provided 13 percent of the \$83.8 million received by Florida's legal services organizations in 2014.



Florida Bar Foundation Grants by Legal Aid Program

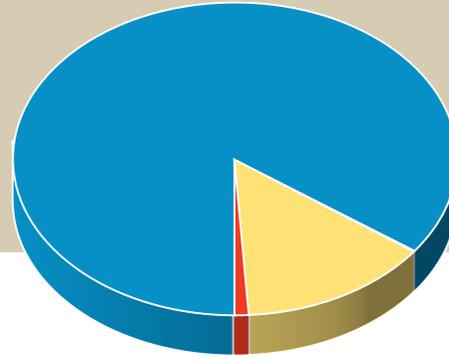
Americans for Immigrant Justice, Miami	\$358,831
Bay Area Legal Services, Tampa	\$180,085
Brevard County Legal Aid, Rockledge	\$37,211
Coast to Coast Legal Aid of South Florida, Plantation	\$23,000
Community Law Program, St. Petersburg	\$23,500
Community Legal Services of Mid-Florida, Daytona Beach	\$290,237
Cuban American Bar Association Pro Bono Project, Miami	\$72,635
Dade County Bar Association Legal Aid Society, Miami	\$172,797
Florida Equal Justice Center, Ft. Myers	\$206,978
Florida Justice Institute, Miami	\$165,199
Florida Legal Services, Tallahassee	\$1,631,975
Florida Rural Legal Services, Lakeland	\$188,837
Florida State University College of Law, Tallahassee	\$107,008
Florida's Children First, Coral Springs	\$142,000
Guardianship Program of Dade County, Miami	\$29,518
Gulfcoast Legal Services, St. Petersburg	\$490,918
Heart of Florida Legal Aid Society, Bartow	\$71,104
Jacksonville Area Legal Aid, Jacksonville	\$380,550
Lee County Legal Aid Society, Fort Myers	\$25,119
Legal Advocacy Center of Central Florida, Sanford	\$274,978
Legal Aid Foundation of the Tallahassee Bar Association, Tallahassee	\$23,500
Legal Aid Service of Broward County, Plantation	\$409,945
Legal Aid Society of Palm Beach County, West Palm Beach	\$216,934
Legal Aid Society of the Orange County Bar Association, Orlando	\$284,807
Legal Aid of Manasota, Sarasota	\$23,500
Legal Services of Greater Miami, Miami	\$279,782
Legal Services of North Florida, Tallahassee	\$145,302
North Florida Center for Equal Justice, Tallahassee	\$90,294
Northwest Florida Legal Services, Pensacola	\$122,800
Seminole County Bar Association Legal Aid Society, Longwood	\$29,099
Southern Legal Counsel, Gainesville	\$228,553
Three Rivers Legal Services, Gainesville	\$28,517
University of Miami School of Law, Miami	\$67,930
Total Legal Assistance Grants Statewide	\$6,823,443*

***Through its Loan Repayment Assistance Program, the Foundation made loans to 175 legal aid staff attorneys totaling \$870,830 in 2014. The loans, which must go toward repaying student debt, are forgiven provided the attorney continues to work for legal aid during the calendar year. The forgiven loans bring the total of the Foundation's 2014-15 Legal Assistance for the Poor funding to**

\$7.7 million

2014-15 Legal Assistance for the Poor Grants by Grant Program

	Grant Amount
General Support	\$5,803,132
Children's Legal Services	\$926,378
Statewide Special Projects	\$93,933
Total	\$6,823,443



Statewide projects address legal needs of seniors, migrant workers

The Foundation helps fund statewide initiatives administered by individual grantees on behalf of the legal aid community. The Florida Senior Legal Helpline administered by Bay Area Legal Services, with major funding from the Florida Department of Elder Affairs, offers free, statewide, telephone-based legal advice, brief services and referrals for Floridians aged 60 and over. A migrant program administered by Florida Rural Legal Services provides legal services for eligible migrant farm workers under federal regulations and assists with wage claims, landlord-tenant matters and other housing issues. Finally, training funds administered by Florida Legal Services support strategic, impactful, and multi-forum advocacy staff training for Foundation-funded legal aid programs.

Foundation grantees documented direct dollar benefits to clients totaling more than \$89 million in 2014 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.



Helping transform Florida's legal services landscape

In addition to its funding of legal aid organizations and projects to improve the administration of justice, The Florida Bar Foundation invests in and helps drive system-wide innovation, advancement and collaboration. Among its most important leadership roles in 2014-15 was that of founding partner in the Florida Commission on Access to Civil Justice, which issued an interim report in 2015 packed with recommendations for changes, initiatives and projects that will open up new avenues for civil legal assistance for people at low and moderate income levels. The Foundation also helped its grantees improve their fundraising and communications efforts through a 2015 conference featuring the National Development Institute and Voices for Civil Justice. This conference was followed in the fall by a Foundation-hosted Legal Aid Summit that engaged legal aid and law school personnel in the design, prototyping and testing of solutions devised by cross-functional and cross-institutional teams to the challenges they and their clients face on a daily basis. The Foundation has engaged the summit's lead facilitator, Margaret Hagan of Stanford Law and the Stanford Design Institute, to help grantees bring a number of these ideas to fruition. Supported through a cy pres award directed to the Foundation with help from Tampa attorney John Yanchunis, the summit was widely hailed by legal aid veterans to be the best of its kind in Florida to date.

“Growing up in poverty is one of the greatest threats to healthy child development. Poverty and financial stress can impede children’s cognitive development and their ability to learn. It can contribute to behavioral, social and emotional problems and poor health.”

Kids Count Data Center, a project of the Annie E. Casey Foundation



CHILDREN SOMETIMES NEED A LAWYER’S HELPING HAND

Protecting the legal rights of children. Helping kids grow into healthier, more productive adults.

The Foundation’s Children’s Legal Services grants fund projects that provide legal representation and advocacy for foster youth and protect the rights of low-income children to special education, medical, developmental and mental health services that are guaranteed by law. Gifts from attorneys to the Foundation through the Children’s Legal Services campaign on The Florida Bar annual fee statement help support these grants, along with proceeds from the Kids Deserve Justice license plate initiative. Florida lawyers generously support the legal needs of Florida children, with \$326,000 raised through the 2015 Children’s Legal Services campaign, mostly from attorneys’ voluntary donations on their Florida Bar fee statements.



Drive justice home. For information about the Kids Deserve Justice specialty license plate and how to order one, visit www.TheFloridaBarFoundation.org/KDJ

Advocacy project secured lawyers for dependent children with special needs

Attorney Richard Joyce stood before Miami-Dade Circuit Judge Michael Hanzman and stated his 10-year-old client’s case in the simplest terms. “I believe the court has the ability to enforce this child’s rights,” Joyce said. The child, who had been in the care of the Florida Department of Children and Families for several years, had been involuntarily committed nine times for psychiatric evaluation under Florida’s Baker Act in spite of the judge’s order that he be admitted to a treatment center equipped to address his “severe mental health needs.” Joyce was there to make sure that his client would not fall through the cracks again, his presence in the courtroom courtesy of legislation passed in 2014 through the efforts of Florida’s Children First, the 2015 recipient of The Florida Bar Foundation’s Paul C. Doyle Children’s Advocacy Award. With support from a Florida Bar Foundation Children’s Legal Services grant, Florida’s Children First advocated successfully for passage of the 2014 legislation, which provides attorneys to protect children with special needs who are in the dependency system. The Florida Legislature also appropriated \$4.5 million in 2014 to fund attorneys to represent these at-risk children. The bills were sponsored by Sen. Bill Galvano and Rep. Erik Fresen. Amy Guinan, an attorney with Florida Legal Services who works on health-care issues, said Joyce’s representation of his young client – a direct result of the legislation – helped spur needed improvements in the wake of statewide implementation of Medicaid managed care.

Florida’s Children First, Coral Springs

SUPPORTING THE WORK OF PRO BONO ATTORNEYS

Leveraging the volunteer resources of the private bar to change lives

Florida lawyers reported to The Florida Bar that they did 1.7 million hours of pro bono work and gave more than \$5.2 million dollars in donations to legal aid organizations during the 12 months ending in June 2015. The Foundation's grantees recruit, train and support volunteer lawyers and often facilitate their work by screening potential clients for financial eligibility and legal problems

before making referrals. Specialized legal aid attorneys often provide vital expertise to pro bono attorneys working outside their practice areas, making them more effective advocates for their clients. The Foundation hired Ericka Garcia as director of pro bono partnerships in 2015 to expand access to justice through greater collaboration.



Brittney Carroll, center, with her parents Shannon and Brian Carroll, and siblings, from left, Samuel, Mirabel, Titus, Magdalene, Anthony and Risa.

A long legal road leads to a permanent home for Brittney

Born with a host of medical disorders, Brittney spent years in and out of Orlando hospitals and medical foster homes until Brian and Shannon Carroll got a phone call asking if they would consider adopting her. Although willing, the Carrolls encountered roadblocks in their effort to adopt Brittney, then 11. But Brittney's Guardian ad Litem attorney went to bat for her with the support of a legal aid attorney funded in part by The Florida Bar Foundation. "It was just a great tag team," Brian Carroll said. On her first visit to the Carrolls' home Brittney ended up back in the hospital, and because the state's Children's Medical Services agency had not transferred her care to Tallahassee, Shannon had to return with her to Orlando by ambulance. She stayed by Brittney's side for a month in the hospital, leaving Brian and friends from church to look after the family's six other adopted children. That's when Brittney's legal aid and pro bono attorneys

became critical to the success of the adoption. The episode made it clear that CMS had to transfer Brittney's medical care to Tallahassee, but the agency was refusing. After a status hearing to which the CMS caseworker didn't show up, Brittney's legal team asked the judge to have her court-ordered to appear. The strategy worked. At a hearing the next day the caseworker agreed to have Brittney's medical care transferred, eliminating the last obstacle to the adoption. Today, Brittney goes camping, plays dress up with her siblings and helps care for the animals on her family's farm. The wheelchair in which she used to spend most of her time sits unused in a corner of the dining room. Instead of living in a medical foster home, where she eventually would have aged out and been sent to live in an institution, she is part of a forever family.

Legal Aid Society of the Orange County Bar Association, Orlando

EQUAL JUSTICE WORKS FELLOWSHIPS

Over the last 16 years, the Foundation and its funding partners have provided matching funds for 72 Fellows in collaboration with Washington, D.C.-based Equal Justice Works. These Fellows have designed and led two-year legal assistance projects at Florida legal aid organizations in areas such as affordable housing, special education, homelessness, veterans' legal services, and medical-legal partnerships. Many have been hired by the host legal aid organization to carry on the work they started, with 72 percent continuing to work in public interest jobs and 66 percent remaining in Florida.

The Florida Bar Foundation has invested more than \$3 million in Equal Justice Works Fellows since 1999, making it the second largest all-time funder of Equal Justice Works, behind only the international law firm of Greenberg Traurig, which has invested \$8 million.



Medical-legal partnership answers veterans' needs

When Henry Wilson's VA pension was cut from \$1,000 to \$65 a month due to clerical errors, the lost income put him into a downward spiral that only reversed when a young lawyer and fellow Army veteran intervened and got his benefits restored. Equal Justice Works Fellow Amanda Sejba stayed on Wilson's case until she was able to reach a supervisor who reviewed his file and recognized the errors. Through her fellowship Sejba was serving as a legal aid attorney for the Veteran Advocates Legal Outreach & Representation (VALOR) medical-legal partnership when Wilson came into her office at the William "Bill" Kling VA Clinic in Tamarac. Wilson, 60, had been forced to move out of his home when he couldn't pay the rent. Homeless, unable to work because of a disability, and with little hope, he went on drinking binges that only made matters worse. His repeated attempts to get the VA to correct the problem had gone nowhere. But his fiancée, Lillian, stuck by him, and so did Sejba. Wilson remembers clearly the day he learned Sejba had managed not only to get his monthly benefit restored, but also to recover for him 10 months of missed payments. "I was on Cloud Nine," Wilson said. "I said, 'Amanda did it!' " With the back pay, he and Lillian were able to buy a used car, and with his monthly benefit restored, they planned to buy a modest home with a VA loan. "It changed my life," Wilson said. "I can see a better way now. I can see a future. I am now at ease with myself, and with the people around me, and I'm grateful."

Coast to Coast Legal Aid of South Florida, Plantation

Coast to Coast Legal Aid of South Florida alone helped nearly 400 veterans in 2015 with housing, foreclosure, Social Security and SSI benefits, veterans' benefits, and consumer issues, as well as family law issues including divorce, modification of child support, and injunctions for protection.



2015-17 Equal Justice Works Fellow Antoinette Pollard Legal Aid Society of Palm Beach County, West Palm Beach

Pollard's Children's Healthcare Advocacy Project is providing direct representation for foster children with unmet medical needs and working to resolve systemic issues involving the government agencies and contractors involved in their care. Greenberg Traurig, through its Holly Skolnick Fellowship Foundation, is co-sponsoring the fellowship with The Florida Bar and The Florida Bar Foundation.

Improving the administration of justice

In 2014-15, The Florida Bar Foundation took on a major statewide role in expanding the strategic use of technology in Florida's legal services delivery system through a \$725,000 grant to establish the Florida Justice Technology Center. Meanwhile, the Foundation continues to be the largest funder of the Innocence Project of Florida, whose \$200,000 Foundation grant includes \$10,000 in matching funds based on a dollar-for-dollar match. The Innocence Project of Florida has used DNA and other evidence to bring about the exoneration of 15 Floridians who served an average of 18.5 years in prison for crimes they did not commit, for a combined total of 277 years. The matching funds are used to help these men transition back into society. The Foundation also granted \$118,000 to the Florida Law Related Education Association, which teaches Florida students about democracy and the American legal system. This includes \$28,000 for its Justice Teaching Institute.

"Thank God. It feels good to be free... The sun feels different from feeling it behind the walls."

-Andre Bryant, 29, as quoted in the Sarasota Herald-Tribune Oct. 1, 2015, the day of his release. Bryant served eight and a half years in prison for a robbery he did not commit and was freed with the help of the Innocence Project of Florida.



New center focuses on access-to-justice technology

In June 2015, the Foundation's board of directors granted \$725,000 in start-up funding for the Florida Justice Technology Center in keeping with the terms of a bridge loan The Florida Bar made to the Foundation in 2014. Dedicated to increasing access to justice through the innovative use of technology, the statewide nonprofit is modeled on the only other statewide nonprofit access to justice technology entity in the country, the nationally-acclaimed Illinois Legal Aid Online. The center's five-member board is chaired by Tampa attorney Kathleen McLeroy.

"This center has gotten off the ground at lightning speed thanks to The Florida Bar Foundation, whose forward-thinking board recognized that technology will be key to expanding access to justice," McLeroy said. "We will always need lawyers to help those with civil legal needs at all income levels, but like every other business process, the legal process can be made much more efficient and effective through the strategic application of technology."

Also on the board are Greg Coleman, immediate past president of The Florida Bar; Adriana Linares, founder of LawTech Partners and a board member of the American Bar Association Law Practice Division Legal Technology Resource Center; Tom Oldt, a Florida Bar Foundation board member and founder of Thomas R. Oldt Investment Services LLC; and James Haggard, staff attorney at Brevard County Legal Aid, an ad hoc member of the technology subcommittee of the Florida Commission on Access to Civil Justice, and founder of a legal tech start-up.

The center is directed by Joyce Raby, former legal aid technology coordinator for the Washington State Bar Association and co-founder of the national Legal Services Corporation Technology Initiative Grant Program. Raby is supported by two part-time employees. Wilneida Negrón, former manager of technology and civic innovations for LawHelpNY, serves as statewide website coordinator for the center and manages FloridaLawHelp.org and FloridaProBono.org. Katrina Miller, a law librarian and attorney, is responsible for managing legal content, information and resources on FloridaLawHelp.org and will develop high-quality, user-centered legal information to serve Florida's low-income communities.



Investing in access to justice for a brighter tomorrow

You, our donors, are investors in America's promise of justice for all. It's a promise we as a nation have not quite figured out how to keep. The right to counsel does not exist for those with civil legal problems. In Florida, state funding for civil legal assistance has been zeroed out. Federal funding, administered by the Legal Services Corporation, is limited and subject to Congressional restrictions. Interest on Trust Accounts revenue has fallen victim to the global recession and its after-effects. For these reasons, low-income Floridians in need of civil legal aid now rely on your generosity to a greater extent than ever before. On behalf of the tens of thousands of Floridians whose futures are now brighter because of free civil legal aid they received this year, we thank you. And we give special thanks to those of you who have earned membership in The Legacy for Justice.

The Legacy for Justice

The Legacy for Justice recognizes those who have included the Foundation in their estate planning, made a single planned or pledged gift 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.

Louie Adcock*

Akerman LLP

Anonymous Fund Central Florida Foundation

Anonymous Fund Community Foundation of

Sarasota County, Inc.

Tod Aronovitz*

The Batchelor Foundation

James L. Bell*

Bruce B. Blackwell*

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Anonymous

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The Florida Bar Criminal Law Section

The Florida Bar Family Law Section

The Florida Bar General Practice, Solo and Small

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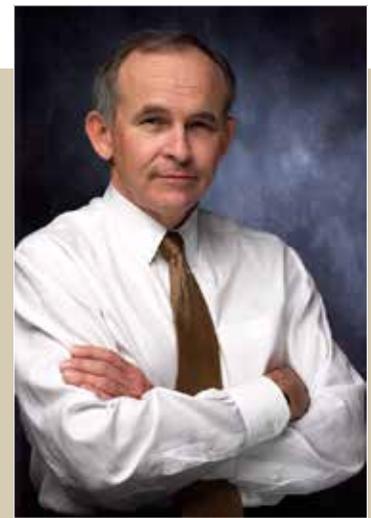
Hon. John D. Wessel* **

John Yanchunis*

Burton Young*

* Fellow

** Deceased



“Since the injury arose from a consumer class action, and since The Florida Bar Foundation has as its charge the funding of legal services for people who can’t afford it, I thought it would be the closest connection to the way in which the injury to the class arose.”

- John Yanchunis of Morgan & Morgan Complex Litigation Group, who has directed two cy pres awards to The Florida Bar Foundation totaling \$795,000. Under the cy pres doctrine, the courts can approve a charitable donation out of unclaimed class action funds or a direct grant in lieu of damages to an organization that could vindicate class member rights in the future.

2014-15 Annual Giving Circles

Counselor's Circle (\$50,000 - \$99,999)

The Florida Bar Family Law Section

Platinum Circle (\$25,000 - \$49,999)

The Florida Bar Trial Lawyers Section

Gold Circle (\$10,000 - \$24,999)

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* Fellow

Thank you to our Fellows

Florida Bar Foundation Fellows, our core supporters, pledge \$1,000 payable over five years, or over 10 years for young, government or nonprofit lawyers. To learn more about the Fellows Program, to make your Fellows pledge, or to see a list of Florida Bar Foundation Fellows, visit www.TheFloridaBarFoundation.org/Fellow



New Fellows in 2014-15

Angela M. Adams

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Bert W. Barclay

Ms. Blair Blackwell

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Pro bono service to the Foundation

Several attorneys contributed to our success in 2014-15 by providing pro bono services to the Foundation itself. In particular, we would like to thank:

Matthew Brenner, Lowndes, Drosdick, Doster, Kantor & Reed, P.A., Orlando
Pat Casey, Patrick J. Casey, PLLC, Palm Beach Gardens
Ava K. Doppelt, Allen, Dyer, Doppelt, Milbrath & Gilchrist, P.A., Orlando
Donny MacKenzie, Holland & Knight, Jacksonville
Doug Sachs, Attorney, Orlando
Donald Carlton Works, III, Jackson Lewis, Orlando

The Foundation has many donors to thank this year, but as we seek to economize, we have few pages on which to thank them, so we invite you to see our comprehensive donor listing at: www.TheFloridaBarFoundation.org/donors.

The Florida Bar Foundation is a 501(c)(3) public charity. Contributions to the Foundation are tax-deductible to the fullest extent permitted by law. While principal support for the Foundation's charitable activities comes from the Interest on Trust Accounts (IOTA) program implemented by the Florida Supreme Court in 1981, Foundation grants also are supported by gifts from Florida attorneys, law firms, corporations, foundations and other individuals.



Florida Bar Foundation CEO Bruce Blackwell, Family Law Section Chair Norberto Katz, and Foundation President Emerson R. Thompson Jr., a senior judge on the Fifth District Court of Appeal, celebrate the Family Law Section's \$75,000 gift to the Foundation.

Family Law Section makes its second \$75,000 gift to the Foundation

The Florida Bar's Family Law Section made a \$75,000 gift to The Florida Bar Foundation in 2015, the section's second such contribution in three years.

"As family lawyers, we understand the vitally important role The Florida Bar Foundation plays in ensuring access to justice for Florida's low-income families, its foster children and its children with special education or medical needs," said Family Law Section Chair Norberto Katz. "Supporting the Foundation's grantmaking is an effective way that we, as a section, can fulfill our professional oath to never reject the cause of the defenseless."

The Family Law Section was among the first Florida Bar sections to step forward with major gifts, as awareness began spreading of the precipitous decline in legal aid funding available through Florida's Interest on Trust Accounts (IOTA) program, which the Foundation administers. The section made a \$75,000 gift in 2012 to support the Foundation's Children's Legal Services grants.

Florida Bar Leadership Academy shows the true meaning of leadership

The Florida Bar Leadership Academy Class II demonstrated what being leaders is all about by making a collective \$34,200 pledge in 2015 to The Florida Bar Foundation, the Academy's first such contribution.

"The Foundation is the hidden gem for lawyers who want to give back and make a difference," said Renee Thompson, chair of Academy Classes I and II. "They do so much to help those who need it the most."

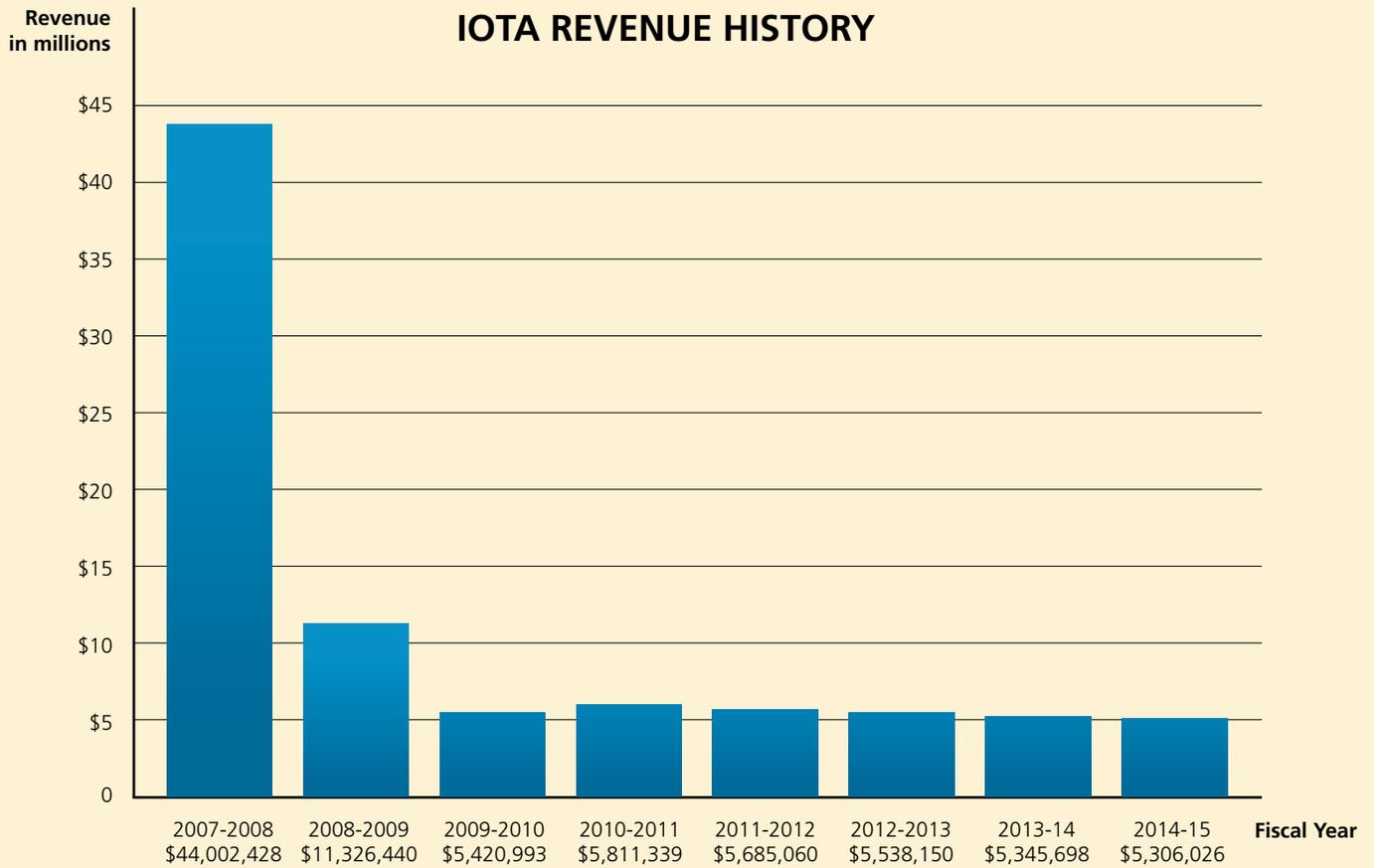
The William Reece Smith, Jr. Leadership Academy is a training program designed to help lawyers become leaders within the legal profession. The Academy began in 2013 and graduated its first Class in 2014. Academy Fellows meet six times a year throughout the state. The Class of 2014 included 61 Fellows, and the Class of 2015 graduated 60.

"Academy is designed to help identify future leaders of The Florida Bar," said Class II Fellow Anitra Raiford.

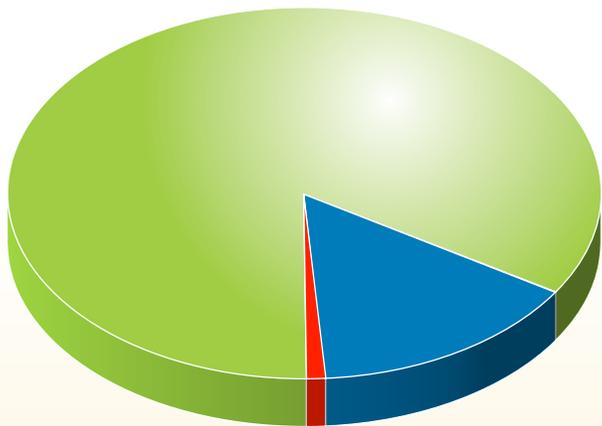


The Florida Bar Leadership Academy Class II presented its collective gift to the Foundation at The Florida Bar Annual Convention in June.

IOTA REVENUE HISTORY



2014-15 EXPENSES \$11,513,915

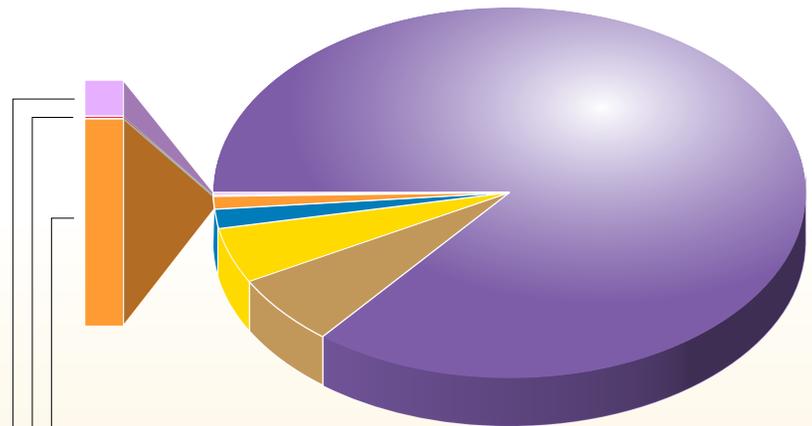


Foundation Grants and Related Activities*	\$8,701,053
Fundraising	\$226,747
Management and General	\$2,586,115

* Of the \$8,701,053 in grants and related activities, \$8,383,053 (96%) was expended on Legal Assistance for the Poor and \$318,000 (4%) was expended on Improvements in the Administration of Justice grants. Management, general and fundraising expenses represent 24.4% of the Foundation's total expenses for 2014-15.

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.TheFloridaBarFoundation.org/finance

2014-15 REVENUES \$6,009,076*



IOTA	\$5,306,026
Children's Legal Services	\$346,445
Miscellaneous Contributions	\$294,590
Fellows and Other Endowment Contributions	\$80,403
Return of Unspent Grant Funds & Miscellaneous Income	\$53,166
Cy Pres Award	\$5,080
Kids Deserve Justice License Plate Sales and Contributions	\$38,011

* Includes net investment loss of \$114,645 (-1.9%)

Message from 2015-16 President Donny MacKenzie

On October 20, 1864, Abraham Lincoln issued Proclamation 118. In it President Lincoln observed that God had animated and inspired our minds and hearts with fortitude, courage, resolution and the reasonable hope of an ultimate and happy deliverance from all our dangers and afflictions. He went on to ask his fellow citizens to offer up prayers and supplications for a return of the inestimable blessings of peace, union and harmony throughout the land, which had been assigned to us as a dwelling place for ourselves and for our posterity throughout all generations.

That proclamation was, of course, the creation of our national day of observance known as Thanksgiving. It is in this spirit that the board and dedicated staff of The Florida Bar Foundation transition to a new year fully committed to helping design the future of legal services in Florida.

And perhaps the best evidence of this commitment was in the Legal Aid Summit the Foundation hosted in Orlando last November. With Margaret Hagan of Stanford Law's Center on the Legal Profession as the lead facilitator, the summit invited legal aid and law school personnel to open up their minds and envision new ways of serving clients using technology, community-based services and other client-centered innovations.

Lawyers, paralegals, IT directors, intake coordinators and other staff worked together

in design teams to develop, prototype, test and present novel solutions to breaking down the barriers that prevent those in need of civil legal aid from receiving it.

Tampa attorney John Yanchunis of Morgan & Morgan Complex Litigation Group made the summit possible by helping direct a cy pres award to the Foundation, a portion of which was used to pay for the three-day event.

Meanwhile, the Foundation is working on new approaches to its own work. It is revising its grant-making and reporting tools by involving its grantees in developing outcome measures that will show how their work changes lives. We and our grantees will benefit by capturing and distilling powerful information on the impact of legal aid that can be shared with donors and funders.

We have committed to strengthening pro bono statewide under the direction of Ericka Garcia, the Foundation's new director of pro bono partnerships, who will collaborate with The Florida Bar Standing Committee on Pro Bono Legal Services, the circuit pro bono committees, the Young Lawyers Division, The Florida Pro Bono Coordinators Association, Florida Bar Foundation grantee organizations and other groups to implement an expanded vision for pro bono in Florida.

Hand in hand with the Florida Commission on Access to Civil Justice, of which the Foundation is a full partner, these sorts of new approaches represent a sea change for legal



services in Florida.

In his remarks at the close of the Legal Aid Summit, James J. Sandman, president of the federally-funded Legal Services Corporation, lent his strong endorsement for Florida's forward-thinking approach to expanding access to justice.

"If there is any place where it can be done, I think it can be done in Florida," he said, adding that this state has demonstrated the ability to collaborate and pull all the necessary players together.

Indeed, we are. We are partnering with those who share our goals. We are not letting a lack of funding get in the way of innovation. We are encouraging and enabling those on the front lines to participate in the process. And we are constantly looking for new and better ways of serving those in need.

On behalf of the Foundation's board and staff, I thank you for your continued commitment and support and wish to you and your loved ones a happy, healthy, and successful year.

One of every four
Florida children lives
in poverty.



When you help a child
overcome barriers, you unleash
a lifetime of potential.

Please consider a charitable donation to help provide legal assistance to Florida's most vulnerable children. The Florida Bar Foundation's Children's Legal Services grants support legal assistance to poor children in critical areas that affect their safety, well-being and future development. Children's Legal Services include help for foster children and children in need of health benefits or special education services. Anyone can give online at www.TheFloridaBarFoundation.org/children. Florida lawyers can also give to Children's Legal Services on their Florida Bar annual fee statement.

100% OF EACH CONTRIBUTION IS RETAINED BY THE FLORIDA BAR FOUNDATION. A COPY OF THE OFFICIAL REGISTRATION (#SC-1897) AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING 1-800-435-7352 WITHIN THE STATE OR VISITING ONLINE AT WWW.800HELPFLA.COM. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL OR RECOMMENDATION BY THE STATE.

If you have questions about making a gift to the Foundation, please contact The Florida Bar Foundation development team at 1-800-541-2195 or contact us by email. Contributions to the Foundation, a 501(c)(3) organization, are deductible as permitted by law.

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