



DARRYL M. BLOODWORTH

President
The Florida Bar Foundation
2001-02

The President's Message

This annual report recounts the Foundation's work during 2001-02 in awarding grants of more than \$11.7 million. The chief beneficiary of our grantmaking continues to be the poor persons and families served by Florida's network of civil legal assistance organizations serving all 67 Florida counties.

The goal of these grants is to support at least minimum access to justice. The Foundation, with assistance from Bar members on the annual Bar Fee Statement, also supports special initiatives such as the Children's Legal Services grant program. This program provides legal advocacy and representation to uphold children's legal rights to educational and other services — services put into place to promote their growth into productive adults.

Of course this brief description and listing of our legal assistance grants cannot paint the full picture of the Foundation or the impact of the significant leadership of our volunteers and staff in Florida's legal assistance community. Whether through substantive and financial support of the important effort to make Florida's system for delivering legal assistance more effective, our on-site grantee evaluation program, our efforts to promote leadership development in the legal assistance community, or programs such as loan repayment assistance which makes public service employment possible for today's law graduates, the Foundation is working to help make the promise of equal access to justice a reality in Florida.

A second area of Foundation grants supports projects to improve the administration of justice in Florida. Although this is a small grant program, it's often the only source of funds in many counties for local courts, bar associations and other

groups to test ways to make the justice system more responsive to the people it's pledged to serve. Because this discretionary grant program generally is limited to demonstration projects or seed money, it's been aptly referred to as one of the few sources of venture capital for the justice system.

We also use our funds to promote the concept of public service to law students through the Legal Services Summer Fellowship and Public Service Fellows programs. The feedback we have received from those programs is positive both in terms of the organizations served and the growing commitment by law students to use their legal skills to assist the less fortunate.

called an audacious goal of securing ten million dollars in state funds for civil legal assistance in Florida. It turned out that ten million was out of reach, but Terry's vision, energy and leadership led to passage of the Florida Access to Civil Legal Assistance Act, the first time the Florida Legislature had appropriated state funds for civil legal assistance. Two million dollars were appropriated for pilot projects in seven judicial circuits. This funding brought the state into partnership with others who have long supported civil legal assistance — most notably the thousands of Florida attorneys who give generously each year of their time and money.

"The first duty of society is to justice."

— Alexander Hamilton

A disappointment this year was that falling interest rates prevented us from realizing a greater result from the amendments to the IOTA rule passed by the Florida Supreme Court in June 2001. The amendments required parity treatment in rates for IOTA accounts and permitted government money market accounts, in addition to sweep accounts and interest checking accounts, for IOTA funds. Of course, the lower interest rates have made our fundraising efforts even more critical to maintaining stability in Foundation grants. So, when a Foundation director or other volunteer asks you to become a Foundation Fellow or support our mission in other ways, I hope you'll say yes.

However, an absolutely singular achievement during the year was one in which the Foundation played only a supporting role. But, this project proved that only with big vision and big goals do we achieve great results. Then Florida Bar President Terry Russell set what some may well have

Finally, I am very proud of the fact that each year there are far more Florida Bar members seeking appointment to the Foundation's board of directors than there are openings to fill. That's not because of the perks or lavish meeting sites — three times a year we meet at airport hotels for two days and in June at the site of the Bar's annual meeting, we hold our annual dinner and awards presentations. What drives that interest in working with the Foundation is a commitment to helping people in need, to the belief that people should not be denied access to legal assistance simply because they lack the financial resources and, most important, to a solemn recognition of the truth of Alexander Hamilton's statement that, "The first duty of society is to justice."



DARRYL M. BLOODWORTH
President, 2001-02

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The Florida Bar Foundation Mission Statement

The mission of The Florida Bar Foundation, a philanthropic organization founded by Florida lawyers and the Supreme Court of Florida, is to provide greater access to justice. The Foundation will accomplish its mission primarily through funding of programs which:

- Expand and improve representation and advocacy on behalf of the poor in civil legal matters;

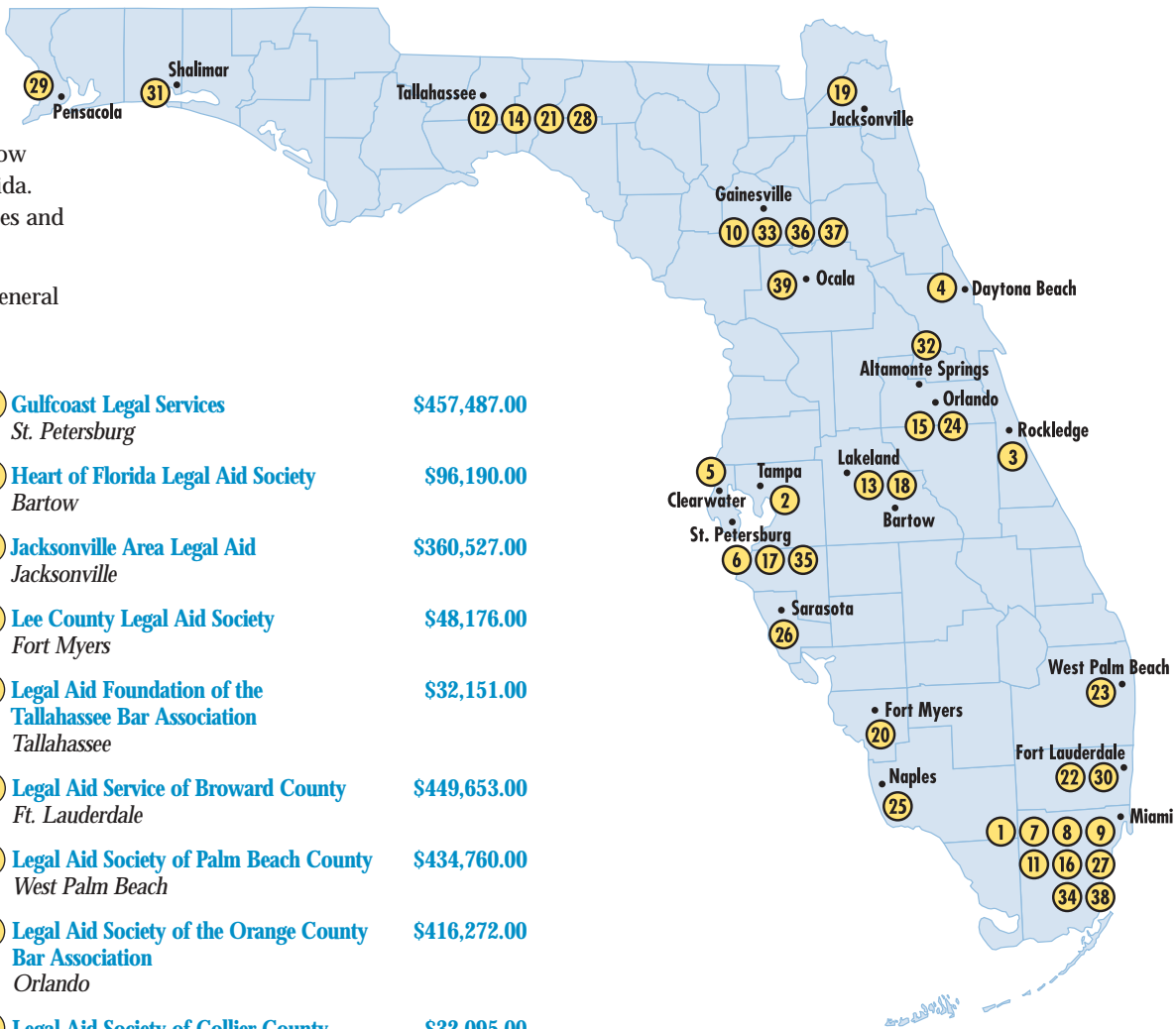
- Improve administration of the institutions of justice;
- Provide financial assistance to students for the study of the law; and
- Promote service to the public by members of the legal profession by making public service an integral component of the law school experience.

Grants for Legal Assistance for the Poor

The Foundation's Legal Assistance for the Poor

(LAP) grant program, supported primarily by IOTA funds, provides general support grants to a network of organizations providing free civil legal services to the poor. Together, this network provides at least basic access to the justice system for low income individuals and families residing in every county in Florida. LAP grants also support legal assistance for specific client services and to serve specific client groups.

In fiscal year 2001-02, the Foundation awarded 39 grants for general support of legal aid organizations serving every Florida County:



1 American Friends Service Committee Central American Political Asylum Program Miami	\$111,030.00	17 Gulfcoast Legal Services St. Petersburg	\$457,487.00	34 St. Thomas University School of Law Immigrant Families Assistance Project Miami	\$5,000.00
2 Bay Area Legal Services Tampa	\$607,162.00	18 Heart of Florida Legal Aid Society Bartow	\$96,190.00	35 Stetson University College of Law Combined Civil Clinics St. Petersburg	\$5,000.00
3 Brevard County Legal Aid Rockledge	\$72,387.00	19 Jacksonville Area Legal Aid Jacksonville	\$360,527.00	36 Three Rivers Legal Services Gainesville	\$324,466.00
4 Central Florida Legal Services Daytona Beach	\$458,845.00	20 Lee County Legal Aid Society Fort Myers	\$48,176.00	37 University of Florida College of Law Virgil Hawkins Civil Clinic Gainesville	\$5,000.00
5 Clearwater Bar Foundation Clearwater	\$32,740.00	21 Legal Aid Foundation of the Tallahassee Bar Association Tallahassee	\$32,151.00	38 University of Miami School of Law Children and Youth Law Clinic Miami	\$5,000.00
6 Community Law Program St. Petersburg	\$42,817.00	22 Legal Aid Service of Broward County Ft. Lauderdale	\$449,653.00	39 Withlacoochee Area Legal Services Ocala	\$259,098.00
7 Cuban American Bar Association Pro Bono Project (Administered by Florida Immigrant Advocacy Center) Miami	\$28,479.00	23 Legal Aid Society of Palm Beach County West Palm Beach	\$434,760.00	Total	\$9,823,195.00
8 Dade County Bar Association Office of Public Service-Volunteer Lawyers Miami	\$323,474.00	24 Legal Aid Society of the Orange County Bar Association Orlando	\$416,272.00		
9 Florida Immigrant Advocacy Center Miami	\$638,035.00	25 Legal Aid Society of Collier County Naples	\$32,095.00		
10 Florida Institutional Legal Services Civil Legal Assistance Project Gainesville	\$217,126.00	26 Legal Aid Society of Manasota Sarasota	\$16,506.00		
11 Florida Justice Institute Miami	\$312,343.00	27 Legal Services of Greater Miami Miami	\$582,119.00		
12 Florida Legal Services Tallahassee	\$1,561,737.00	28 Legal Services of North Florida Tallahassee	\$419,087.00		
13 Florida Rural Legal Services Lakeland	\$673,859.00	29 Northwest Florida Legal Services Pensacola	\$228,804.00		
14 Florida State University College of Law Pro Bono Project Tallahassee	\$5,000.00	30 Nova Southeastern University/Shepard Broad Law Center Ft. Lauderdale	\$5,000.00		
15 Greater Orlando Area Legal Services Orlando	\$212,098.00	31 Okaloosa County Legal Aid Shalimar	\$22,652.00		
16 Guardianship Program of Dade County Miami	\$56,958.00	32 Seminole County Bar Association Legal Aid Society Altamonte Springs	\$54,331.00		
		33 Southern Legal Counsel Gainesville	\$209,731.00		

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



Pro bono hours donated by members of The Florida Bar through organized pro bono programs in 2001 represented 20% of all cases — nearly 19,000 — closed by Foundation legal aid grantees. Foundation funds primarily support the intake and referral of cases to pro bono volunteer attorneys and to provide such volunteers with backup support and training.

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

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

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

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

The benefits of involving members of The Florida Bar in serving the legal needs of the poor extend well beyond the positive outcomes for individual clients, because attorneys make things happen. When talent and commitment are applied to removing the legal barriers poor people face in stabilizing their lives, entire communities benefit.

The Foundation encourages its Legal Assistance for the Poor grantees to continue to expand the scope of pro bono opportunities they offer private attorneys in their communities.

How Grantees Have Helped This Year

Family Matters: 34,604 Cases (36%)

Two days before Christmas, a single mother of two young daughters entered the legal aid lobby in a state of hysteria. She had just been notified that her abusive former husband had obtained an ex-parte custody order for the girls from a Texas court and had tried to remove the girls from school. Fortunately, the school had refused to turn over the children. Legal aid went to court that same day and obtained an emergency order preventing the former husband from removing the children from their mother's care. Later, legal aid collaborated with a Texas legal aid program and had the Texas custody order set aside.
Dade County Bar Association's Office of Public Service

Housing Matters: 16,428 Cases (17%)

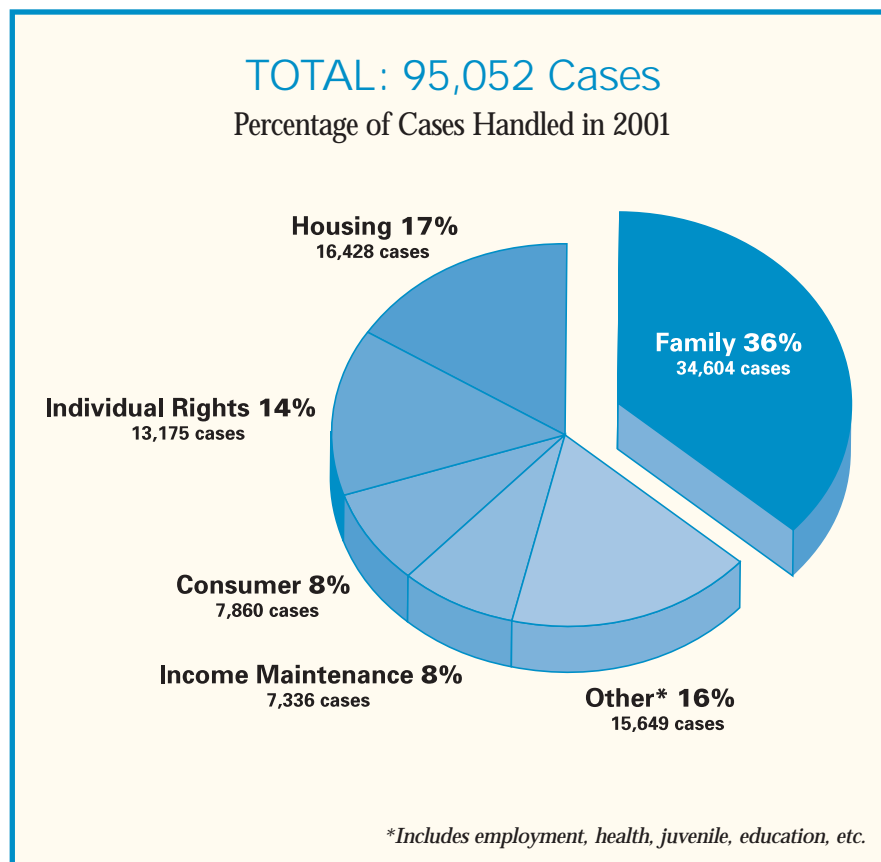
Dozens of residents in a rural northeastern Florida county lost their homes to a local man who sold and financed residential real estate. The man used legal documents for transfer of title that did not include required Truth-in-Lending disclosures and charged illegal fees and other costs in the transactions that led to eventual default and loss of homes by the homeowners. A legal aid and private attorney co-counseled the case and filed suit in Federal District Court, winning a settlement for the homeowners.
Florida Legal Services

Individual Rights Matters: 13,175 Cases (14%)

An Albanian man and his wife had been denied political asylum. Facing deportation, the couple sought legal assistance. Legal aid advocates documented the history of abuse suffered by the husband in Albania due to his family's political activities and represented him at an appeal. At his hearing, the man told the story of his family's imprisonment, starvation and mistreatment, first under communists and more recently under the brutal, anti-democratic regime that ruled through the political unrest of the 1990s. After his house was bombed in 2000, he and his wife fled to the United States. Based on the documentation presented at the appeal hearing, the immigration judge overturned the original INS decision and granted both clients political asylum.
Florida Immigrant Advocacy Center

Consumer Matters: 7,860 Cases (8%)

An 82-year-old woman thought she had purchased \$12,000 worth of home improvements on her older home, but signed a note that would have ultimately cost her \$43,000. When the contractor's work turned out to be totally unsatisfactory, she called the mortgage company to tell them not to pay for it. Much to her surprise, the contractor had been paid in full without her authorization. On her behalf, legal aid sued the contractor, the mortgage broker, and the mortgage holder. Legal aid then mediated a settlement that



relieved the woman of any obligation under the note and discharged the lien.
Central Florida Legal Services

Income Maintenance Matters: 7,336 Cases (8%)

A single mother and successful car salesperson was diagnosed with a brain tumor in 1991. Although ill and unable to work, she was denied Social Security

disability benefits. After representation by legal aid at an administrative hearing, she was awarded \$21,867 in back benefits and monthly benefits of \$874. In a letter to the program the client said, "My son and I have been homeless... I'm tired of being so sick... Thank you, Three Rivers, for getting me the help I needed."
Three Rivers Legal Services

Legal Aid Advocates Fellowship Program

Since 1999, the Foundation and its Florida funding partners have provided matching funds for 26 Florida Fellows. Fellows have designed and led legal assistance projects in affordable housing, welfare to work, domestic violence, special education for disabled children, homelessness, immigration, prisoner rights, environmental practice, and family preservation. These two-year public interest Fellowships are sponsored by the Washington, D.C.-based Equal Justice Works with funds provided by the Open Society Institute. The Fellows are hosted by Foundation funded legal assistance organizations.

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

In 2001-02, the Foundation approved matching funds for seven Fellows in the Class of 2002-04 and was joined by funding partners The Florida Bar, the law firms of Greenberg Traurig and Gary, Williams, Parenti, Finney, Lewis, McManus, Watson & Sperando; the Advocacy Center for Persons with Disabilities; and the Orange County Bar Association Foundation.

The Florida Bar Foundation Legal Aid Advocates Fellowships

Host Legal Assistance Program	Fellow	Project Name
Brevard County Legal Aid, Inc. <i>Rockledge</i>	Delaine Arrington	Family Pro Se Project
Florida Immigrant Advocacy Center <i>Miami</i>	Lisa Frydman	Unaccompanied Minor's Project
Florida Institutional Legal Services <i>Gainesville</i>	Cassandro Capobianco	Disabled Prisoner Advocacy Project
Florida Rural Legal Services <i>Ft. Myers</i>	Joseph Cohen	Subsidized Housing Project
Legal Aid Service of Broward County <i>Ft. Lauderdale</i>	Melissa Zelniker	Juvenile Advocacy Project
Legal Aid Society of Palm Beach County <i>West Palm Beach</i>	Shahar Vinayi	Elder Advocacy Project
Legal Aid Society of the Orange County Bar Association <i>Orlando</i>	Cara Hallmon	Teen Parent Project

Checking Off for Justice – Lawyers' Challenge for Children

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



Children's Legal Services

Since 1999, The Florida Bar Foundation has funded special annual grants for legal assistance to children out of IOTA funds. Starting in 2000-01, gifts from attorneys to the Foundation from the annual Florida Bar Fee Statement and from other sources also support these grants.

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

In 2001-02, the Foundation gave Children's Legal Services grants totaling \$636,000 to 13 local legal aid and legal services programs.

Central Florida Legal Services Legal Services for Children with Special Needs	<i>Daytona Beach</i>	\$47,000.00
Florida Immigrant Advocacy Center Unaccompanied Minor's Project	<i>Miami</i>	\$15,000.00
Florida Legal Services Children's Impact Advocacy and Clearinghouse for State Support	<i>Tallahassee</i>	\$73,500.00
Florida State University College of Law Children's Advocacy Center	<i>Tallahassee</i>	\$60,000.00
Lawyers for Children America	<i>Miami</i>	\$15,000.00
Legal Aid Service of Broward County Education Legal Rights	<i>Ft. Lauderdale</i>	\$25,000.00
Legal Aid Society of Palm Beach County Educational Advocacy	<i>West Palm Beach</i>	\$25,000.00
Legal Services Greater Miami Special Education Advocacy	<i>Miami</i>	\$25,000.00
Legal Services of North Florida Teen Parent Project	<i>Tallahassee</i>	\$15,500.00
Nova Southeastern University Shepard Broad Law Center Children First	<i>Ft. Lauderdale</i>	\$170,000.00
Southern Legal Counsel Special Education Advocacy Project	<i>Gainesville</i>	\$100,000.00
University of Miami School of Law Children and Youth Law Clinic	<i>Coral Gables</i>	\$50,000.00
Withlacoochee Area Legal Services Children's Advocacy	<i>Ocala</i>	\$15,000.00

Total **\$636,000.00**

Law Student Assistance Grants

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

Public Service Fellows Program

Program Goals

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

Public Service Fellows 2001-2002 Grant Awards

Eighty law students participated in the 2001-02 IOTA Public Service Fellows Program and contributed over 19,000 hours of direct public service. Students work at legal aid offices, guardian ad litem programs, public defender offices, state attorney offices and other public service agencies.

Florida Coastal School of Law Jacksonville	\$14,000.00
Florida State University College of Law Tallahassee	\$23,000.00

Nova Southeastern University/Shepard Broad Law Center Fort Lauderdale	\$23,000.00
St. Thomas University School of Law Miami	\$20,000.00
Stetson University College of Law St. Petersburg	\$23,000.00
University of Florida Levin College of Law Gainesville	\$22,100.00
University of Miami School of Law Coral Gables	\$27,400.00
TOTAL	\$ 152,500.00

Legal Services Summer Fellowship Program

In cooperation with Florida's fully accredited law schools, the Foundation administers a Summer Fellowship Program for first and second year law students at Foundation funded legal assistance programs in Florida. In 2001-02, \$95,000.00 was awarded for Summer 2002 Fellowships (LAP funds — \$47,500.00; LSA funds — \$47,500.00). Twenty-one law students were assigned to 20 legal assistance programs for eleven-week internships from May to August 2002.

Brianna Adams	Brevard County Legal Aid
Lorena E. Bravo	Florida Immigrant Advocacy Center
Kristen M. Cooley	Florida Institutional Legal Services
Ariel Oscar Diaz	Florida Justice Institute
Evan George	Florida Rural Legal Services
Lizzie L. Johnson	Seminole County Legal Aid
Tatiana Laroche	University of Miami Law School Children & Youth Law Clinic
Kisa K. Magnuson	Community Law Program
Luis A. Maldonado	Withlacoochee Area Legal Aid
DeShannon McDonald	Three Rivers Legal Services
Janet C. Neris	Legal Aid Service of Broward County
Alexander S. Orlofsky	Legal Services of Greater Miami
Sarah J. Rumph	Gulfcoast Legal Services
Thomas E. Runyan, Jr.	Legal Aid Service of Broward County
Sylvia Y. Simmons	Florida Legal Services - Tallahassee
Tianna Sousa	Dade County Legal Aid
Tim Stevens	Legal Aid Service of Palm Beach County
McKeesha Janeice Tann	Legal Aid Society of the Orange County Bar Association
Valerie A. Thompson	Legal Services of North Florida
Joanna Volpe	Southern Legal Counsel
Jennifer Wimberly	Jacksonville Area Legal Aid



Class of 2002 Summer Fellows Training Seminar.

"This experience makes me want to continue my pro bono work and continue in the public interest profession. It has made me even more passionate."

"These past 11 weeks were spectacular and served to reaffirm my dedication to helping others. This experience is exactly what I needed to make me aware that I had made the right decision by going to law school."

Comments of 2002 Summer Fellows

Russell Receives Award for State Legal Aid Funding Initiative

Almost a year to the day from telling the Foundation's board of directors of his plan to secure state funding for civil legal aid, outgoing Florida Bar president Terry Russell received the President's Award for Excellence in recognition of his success. The Florida Access to Civil Legal Assistance Act was passed in the 2002 session of the Florida legislature and signed into law, providing \$2 million as funding for pilot projects at legal aid programs in seven judicial circuits.

Foundation President Darryl M. Bloodworth presented Russell the Award in June at the Foundation's annual dinner in Boca Raton. Several legislative leaders also were recognized that evening for their support of the state funding legislation: incoming Speaker of the Florida House of Representatives Johnnie B. Byrd, Jr., the chief House sponsor of the Act and former Bar Board of Governor member J. Dudley Goodlette, chief Senate sponsor Burt L. Saunders and House of Representatives member Carlos A. Lacasa.



Terry Russell receives the President's Award for Excellence on June 20, 2002 in Boca Raton. Foundation President, Darryl M. Bloodworth presents the award.

Excerpt from Award

For the vision, wisdom, commitment, and leadership that led to adoption in 2002 of the Florida Access of Civil Legal Assistance Act, which increases access by the poor to the institutions of justice.

Blackwell Honored for Fundraising Success

Foundation director Bruce Blackwell was singled out for his yeoman fundraising effort in 2002 with a President's Award for Excellence from Foundation president Darryl M. Bloodworth. The award was presented at the Foundation's June annual meeting for Blackwell's

"...extraordinary commitment of time, energy, and talent to increase financial support for the mission of the Foundation through his successful leadership of the 2001-02 Orlando Area Fellows Recruiting Campaign."

Medal of Honor Awards



Raul G. Barrera receives the prestigious Medal of Honor Award for a non-lawyer on June 20, 2002, in Boca Raton. Darryl M. Bloodworth presents the award.

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

The first is for a member of The Florida Bar who has demonstrated his or her dedication to the objectives of the Bar as set out in the Rules Regulating The Florida Bar:

"...to inculcate in its members the principles of duty and service to the public, to improve the administration of justice, and to advance the science of jurisprudence."

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

The 2002 Medal of Honor Awards were presented at the Foundation's 26th annual dinner in June by Foundation President Darryl M. Bloodworth.

The recipient of the 2002 Medal of Honor for a lawyer was Martha W. Barnett, a partner in the Tallahassee office of Holland & Knight. Barnett, the first woman to chair the ABA House of Delegates and the second woman president of the ABA, was recognized for her courageous support of a moratorium on the death penalty, her determined work benefitting the descendants of the 1923 Rosewood massacre, and her advocacy to maintain the impartiality of the judicial system.



Martha W. Barnett receives the prestigious Medal of Honor Award for an attorney on June 20, 2002, in Boca Raton. Darryl M. Bloodworth presents the award.

Excerpt from Medal of Honor Citation for Martha W. Barnett

For dedication to improving the administration of justice as an inspired leader of the organized bar, passionate defender of the legal rights of the impoverished and of those with unpopular causes, and consummate lawyer typifying the highest ideals of the legal profession.

Raul G. Barrera, a paralegal with the Migrant Farmworker Justice Project of Florida Legal Services, was presented with the 2002 Medal of Honor for a non-lawyer. Barrera was recognized for more than 35 years of dedicated and selfless service in the cause of securing justice for migrant farmworkers in Indiana, Texas and Florida by providing outreach services and maintaining contact with isolated migrant farmworkers.

His accomplishments are the result of steadfast and tireless commitment, offering inspiration to the abused worker that justice will be served on their behalf.

Improvements in the Administration of Justice Grant Program

Grantmaking Philosophy

A goal of The Florida Bar Foundation is to focus grants in areas where IOTA funds can have a measurable impact. Toward that end, the Foundation concentrates IOTA grants for improvements in the administration of justice in four areas, with emphasis on how the courts can operate more effectively and expeditiously.

Areas of Funding

- Improvement in the operation and management of the court system;
- Improvement and reform of the criminal, civil, and juvenile justice systems;
- Public education and understanding about the law, including law-related education;
- Promotion and support for public interest legal representation.

The Foundation occasionally considers and seeks out projects in other subject areas related to improving the administration of justice in Florida.

Funding Criteria

Preference generally will be given to:

- Applicants seeking start-up funds or seed money over a one or two-year period;
- Programs with demonstration value or replication potential;
- Requests for matching funds.

AOJ typically does not fund direct service programs (e.g. drug treatment or counseling), replicas of established programs, local community groups, programs for which there is a governmental responsibility to provide funding, and does not provide continuing program support.

Improvements in the Administration of Justice 2001-02 Grant Awards

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

The Florida Law Related Education Association, Inc.	\$181,125.00
Tallahassee Rebuilding law-related education	

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

Florida Legal Services, Inc.	\$334,300.00
Tallahassee Team Child — Juvenile Justice and Delinquency Prevention Advocacy Project	

Promotion and support for public interest legal representation

Florida State University	\$150,000.00
Center for the Advancement of Human Rights Tallahassee The New Equation for 21st Century Law: Human & Civil Rights in Context of our Nation's Response to Terrorist Attacks	

Trial Lawyers Care, Inc.	\$12,500.00
New York Free Legal Help for 9-11 Victims	

Total	\$ 677,925.00
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Steven M. Goldstein Award for Excellence

This award was established by The Florida Bar Foundation board of directors to honor the memory of Steven M. Goldstein. Goldstein, a former legal services attorney and professor at Florida State University College of Law, was a tireless advocate of the legal rights of the poor and disadvantaged and was respected nationally for his dedication to upholding the constitutional rights of those with unpopular causes. At the time of his death in 1994, Goldstein had just been elected secretary/treasurer of the Foundation and had, for many years, served as the touchstone by which the Foundation measured the significance of its mission and its progress.

This competitive award program recognizes a project of significant impact undertaken by an IOTA legal assistance for the poor grantee. To be eligible, the project must affect a substantial number of poor persons, address an important poverty-law issue, involve a significant commitment of grantee program resources and staff, and reflect legal work which is of a high professional level.

The inaugural Steven M. Goldstein Award for Excellence went to Florida Legal Services in June 1999 for its Migrant Farmworker Justice Project in recognition of the tireless efforts and outstanding legal work of project attorney Robert A. Williams. The project represented migrant

farmworkers in Gadsden County, Florida to protect them in the face of mass firings and arrests, advance their rights to organize and take collective action to improve and protect their employment, and ensure their rights to unemployment compensation.

The award was next presented in June 2001 to Florida Immigrant Advocacy Center, Florida Justice Institute and Florida Legal Services for their collaborative effort to successfully enforce the legal rights of immigrants in Immigration and Naturalization Services (INS) proceedings in Miami. Three class action law suits were filed against INS challenging its delays of

up to three years in processing citizenship applications and its summary denial of medical and fee waivers to qualified immigrants. As a result of the legal challenges, the INS adopted policies to rectify its practices.

Also in 2001, three grantee organization projects tied for first runner-up for the award. They were Florida Institutional Legal Services for its Good Time Credit project, the Title Loan project of Florida Legal Services, and University of Miami Children and Youth Law Clinic's Foster Children's Mental Health Rights project.

Fellows Program & Endowment Trust

The Fellows of The Florida Bar Foundation are concerned with improving Florida's legal system and share a common interest in supporting the charitable purposes of the Foundation.

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

Recognition Levels for Lifetime Giving

Bronze Circle	\$1,001.00 – \$4,999.99 cumulative over a lifetime
Silver Circle	\$5,000.00 – \$9,999.99 cumulative over a lifetime
Gold Circle	\$10,000.00 – \$24,999.99 cumulative over a lifetime
Director's Circle	\$25,000.00 – \$49,999.99 cumulative over a lifetime
President's Circle	\$50,000 and more cumulative over a lifetime

In 1991, the Foundation established an Endowment as a permanent source of support for all of the Foundation's charitable activities. Initial funding for the Endowment came from \$1 million in unrestricted IOTA investment earnings, the income from which exclusively will fund IOTA grants. In 2001-02, additional Endowment funding came from \$98,170 in Fellows' pledge payments and other contributions increasing total Endowment net assets to \$2,772,830.

The Foundation's Fellows Program is an excellent venue for attorney participation in the charitable objectives of the Foundation.

Director's Circle
\$25,000.00 – \$49,999.99

J. Wayne Hogan

Silver Circle
\$5,000.00 – \$9,999.99

Darryl M. Bloodworth

A. Hamilton Cooke

+ Jane Elizabeth Curran

+ Lou Ann Powell

William L. Thompson, Jr.

Bronze Circle
\$1,001.00 – \$4,999.99

Paul C. Doyle

+ Donald E. Hines

Arthur J. England, Jr.
Robert M. Ervin
Earl Drayton Farr, Jr.
John M. Farrell
**J. Rex Farrior, Jr.*
Robert R. Feagin III
Ray Ferrero, Jr.
+ Abraham S. Fischler
John Edwin Fisher
Robert L. Floyd
W. D. Frederick, Jr.
Thomas G. Freeman, Jr.
George D. Gabel, Jr.
Robert P. Gaines
Norman S. Gerstein
**Delbridge L. Gibbs*
Leonard H. Gilbert
**William A. Gillen*
Herman W. Goldner
**Steven M. Goldstein*
Harry Goodheart III
**John R. Gould*
+ Oliver L. Green, Jr.
Stephen H. Grimes
**Earl Bryce Hadlow*
Mitchell B. Haigler
Frank D. Hall
M. Lewis Hall, Jr.
Douglas M. Halsey
Lawrence J. Hamilton II
Leon H. Handley
Stephen F. Hanlon
+ Joseph D. Harbaugh
John F. Harkness, Jr.
Gordon H. Harris
Robert M. Harris
William T. Harrison, Jr.
**Gerald T. Hart*
Kenneth R. Hart
Kenton H. Haymans
+ Maria E. Henderson
William O.E. Henry
Benjamin H. Hill III
John Fraser Himes
Lynn James Hinson
Judith Hodor
Henry M. Cox III
Wade L. Hopping
Mark Hulse
Edward Stewart Jaffry
**Frances Ann Jamieson*
Timothy A. Johnson, Jr.
John Arthur Jones
Richard Thomas Jones
Robert Paul Kaye
T. Paine Kelly, Jr.
John Marshall Kest
Sally D.M. Kest
Charles A. Kimbrell
David B. King
E.C. Deeno Kitchen
Joseph P. Klock, Jr.
Edward F. Koren
Myron S. Krasny
Lawrence Philip Kuvin
Edward Ira Lack
Joseph W. Landers, Jr.
Thomas F. Lang
William F. Leonard
**Gavin K. Lets*
Warren W. Lindsey
Byrne Litschgi
**Robert Edward Livingston*
Mary Bland Love
John F. Lowndes

William M. MacKenzie, Jr.
Amelia Rea Maguire
Michael Charles Maher
Stephen T. Maher
Sam H. Mann, Jr.
Michael E. Marder
Bruce Marger
E. Snow Martin
Rafael Eduardo Martinez
**M. Craig Massey*
Robert Donald Mastry
William G. Mateer
**Lawrence Glenn Mathews, Jr.*
**Russell McCaughan*
Parker Lee McDonald
F. Shields McManus
John Fred McMath
Scott Ramsey McMillen
John Mathews McNatt, Jr.
Michael J. McNerney
John W. McWhirter, Jr.
Walter M. Meginniss
**Richard H. Merritt*
James Elliott Messer
Burton M. Michaels
Harry Lewis Michaels
Donald M. Middlebrooks
Joe F. Miklas
Joseph Payne Milton
Robert Morel Montgomery, Jr.
Gene Moore
Robert M. Moore
H. Edward Moore, Jr.
Bernard R. Moseley
James F. Moseley
Stephen B. Moss
Jon C. Moyle
Chandler R. Muller
Rene V. Murai
John Starr Neely, Jr.
Donald Hamilton Norman
Hubert C. Normile, Jr.
W. M. O'Bryan
**Samuel O. O'Bryan, Jr.*
**James Phillip O'Flarity*
Andrew M. O'Malley
**William G. O'Neill*
Albert C. O'Neill, Jr.
Jarret C. Oeltjen
Ben F. Overton
**E. Albert Pallott*
Robert C. Palmer III
A. C. Paoli
Benjamin Green Parks
Robert L. Parks
Philip S. Parsons
Robert W. Pass
Dorothy Harris Pate
Andrew G. Pattillo, Jr.
Daniel S. Pearson
Ray H. Pearson
Thomas G. Pelham
David L. Perry, Jr.
Roderick N. Petrey
Lawrence J. Phalin
**John C. Pinkerton*
Neal Powell Pitts
Frank L. Pohl
James Nelson Powers
Gregory A. Presnell
Gary L. Printy
H. Palmer Proctor
M. Julian Proctor
Roosevelt Randolph

Irene Redstone
Richard P. Reinhart
Robert M. Rhodes
Robert L. Rhodes, Jr.
Gerald F. Richman
James C. Rinaman, Jr.
Annette Ritter
Florence Snyder Rivas
Robert Rivas
Howard P. Rives
H. Franklin Robbins, Jr.
Bruce H. Roberson
Stephen K. Roddenberry
Bruce S. Rogow
Edward B. Rood
Emery H. Rosenbluth, Jr.
Frederick M. Rothenberg
Fletcher G. Rush
Gary H. Rushmer
James M. Russ
E. Lanny Russell
Terrence Russell
Marsha G. Rydberg
+ Jeanne V. Sams
Johnson S. Savary
John J. Schickel
Harvey E. Schlesinger
Eleanor L. Schockett
Thomas J. Schulte, Sr.
George E. Schulz, Jr.
Jill Steinberg Schwartz
Robert C. Scott
Christian D. Searcy
Patricia A. Seitz
Lawrence E. Sellers, Jr.
Winifred J. Sharp
L. David Shear
William J. Sheppard
**Stuart L. Simon*
Chesterfield H. Smith
**Samuel S. Smith*
William M. Smith
D. Culver Smith III
**Sherman N. Smith, Jr.*
William Reece Smith, Jr.
Robert M. Sondak
Neal R. Sonnett
Karla R. Spaulding
J. B. Spence
C. Lawrence Stagg
Charles Raymond Stepter, Jr.
Jerome H. Stern
Arnold Obie Stewart
William L. Stewart
Adele I. Stone
Paul Anthony Straske
David Updegraff Strawn
Sidney A. Stubbs, Jr.
Janet R. Studley
Eli Harold Subin
John J. Sulik
Dwight Sullivan
**Alan C. Sundberg*
**Herbert Walter Tannenbaum*
Dennis P. Thompson
Emerson R. Thompson, Jr.
Richard Joseph Thornton
John W. Thornton, Jr.
**William Trickel, Jr.*
Holmes Russell Troutman
Steven J. Uhlfelder
James A. Urban
William A. VanNortwick, Jr.
G. B. McVay Voght

Bill Wagner
Sylvia H. Walbolt
**James H. Walden*
Vernetta L. Walker
Michael Raymond Walsh
David Elmer Ward, Jr.
Richard P. Warfield
**Lamar Warren*
+ Donald J. Weidner
Gordon W. Wells
Linda F. Wells
**Joel R. Wells, Jr.*
Susan B. Werth
William Whitaker
C. Gary Williams
**Reginald L. Williams*
O. Edgar Williams, Jr.
Douglas M. Williamson
Lee L. Willis II
**Richard Frederick Wolfson*
John R. Wood
Council Wooten, Jr.
Frank Wotitzky
Leo Wotitzky
Arthur G. Wroble
Barbara M. Yadley
Burton Young
Louise B. Zeuli
**Harry Zukernick*

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William Carter Gridley
Christopher L. Griffin
Frank A. Hamner
Ronald A. Harbert
James C. Hauser
Wayne L. Helsby
Donald R. Henderson
Robert D. Henry
H. Manuel Hernandez
Wm. Earl Higginbotham
Mark L. Horwitz
John M. Howell
Hal H. Kantor
Norberto S. Katz
John A. Kirst, Jr.
Julian H. Kreeger
Steven Michael Labret
Douglas P. Lambert
Samuel Harker Lanier
M. Catherine Lannon
Robert Leventhal
John D. Mahaffey, Jr.
Kenneth L. Mann
Brian Michael Mark
Byrd F. Marshall, Jr.
Gary E. Massey
Marybeth McDonald
Brian A. McDowell
J. Thomas McKeel
Kathleen S. McLeroy
Michael P. McMahon
Robert William Mead, Jr.
Howell W. Melton, Jr.
Joseph Clay Meux, Jr.
John J. Mikals
Mary Ann Morgan
Joseph Morrell, Sr.
M. Wayne Myers
R. Daniel Noey
Dennis R. O'Connor
Leslie King O'Neal
F. Perry Odom
Ronald M. Owen
Martin S. Page
James F. Page, Jr.
David Aaron Paul
James Stephen Pearthree
Patrice J. Pilate
Gene Reibman
Charles F. Robinson
Gerald A. Rosenthal
Mary S. Scriven
Charles W. Sell
Harrison T. Slaughter, Jr.
Melodee Smith
Ben W. Subin
Roland A. Sutcliffe, Jr.
William Francis Sutton, Jr.
Richard Byron Troutman
Catherine Tucker
Nancy S. Weber
Robert Neal Wesley
Brian T. Wilson
William B. Wilson
Stephen N. Zack
Thomas A. Zehnder

* Deceased
+ Honorary

Life Members

Charles W. Abbott
Adam Gillespie Adams III
Louie N. Adcock, Jr.
**James Adkins*
Thomas D. Aitken
James E. Alderman
Martin J. Alexander
Walter Helion Alford
Sam Y. Allgood, Jr.
Jonathan L. Alpert
James J. Altman
Angus G. Andrews
Charles Dubose Ausley
Margaret B. Ausley
Gregory A. Baldwin
William Cook Ballard
Thomas H. Barkdull, Jr.
Marvin E. Barkin
Martha W. Barnett
Eunice T. Baros
John Richard Barrett
Hilarie Bass
Drake M. Batchelder
Anthony Sylvester Battaglia
James A. Baxter
James D. Beasley
Robert Jordan Beckham
**Dixie E. Beggs*
Randall C. Berg, Jr.
Bruce B. Blackwell
Irwin J. Block
E. Jackson Boggs
Joseph Arthur Boyd
Donald L. Braddock
Joseph W. Bradham, Jr.
**Shepard Broad*
Thomas W. Brown
John M. Brumbaugh
J. Shepard Bryan, Jr.
Rowlett W. Bryant
Mark Buchbinder
Robert J. Buonauro
Henry Burnett
**+James M. Burns*
John L. Burns

Stephen D. Busey
Ronald K. Cacciatore
L. Kinder Cannon III
Hugh A. Carithers, Jr.
Russell E. Carlisle
C. Graham Carothers
Marshall R. Cassidy
Neil R. Chonin
**Harold R. Clark*
Julian D. Clarkson
Robert T. Clelland, Jr.
Edwin C. Cluster
James E. Cobb
Jules Simon Cohen
Howard Coleman Coker
Dean C. Colson
J. Marshall Conrad
John F. Corrigan
Arthur Howard Courshon
Henry M. Cox III
A. Jay Cristol
James F. Crowder, Jr.
John J. Cunningham, Jr.
Ralph E. Cunningham, Jr.
**Robert M. Curtis*
Edward I. Cutler
**Irving Cypen*
Talbot D'Alemberte
Howard L. Dale
Roy B. Dalton, Jr.
**Darrey A. Davis*
William H. Davis
Stephen E. Day
George H. DeCarion
Bernard H. Dempsey, Jr.
C. Harris Dittmar
Russell W. Divine
James A. Dixon, Jr.
Ava Doppelt
W. Dexter Douglass
Robert W. Duckworth
Davisson F. Dunlap
William G. Earle
Raymond Ehrlich
Timothy B. Elliott
Marsha Elser
Patrick G. Emmanuel

Investing in Justice



Our mission is to provide greater access to justice. We do that primarily by providing leadership and funding for legal aid in Florida. We also fund projects to improve Florida's justice system, including innovations in court operation, and to instill the spirit of public service in students at Florida law schools.

IOTA funding for civil legal aid supports programs in your community which offer advice and help with legal matters for people with no place else to turn. From helping a single mother collect the child support she deserves, to assisting an elderly person overturn an unlawful eviction, civil legal aid is working in your community to help people when their rights are denied.

Although IOTA funds are a significant source of support for the Foundation's mission, we can and need to do more. Working together, we can continue our charitable activities and enhance our mission.

Your tax-deductible gifts to the Foundation can help provide access to justice for the most vulnerable members of society. Gifts can support current programs or can be added to The Florida Bar Foundation Endowment Trust as a permanent source of support for Foundation programs.

Florida lawyers — and the broader public — consistently demonstrate their sense of responsibility to care for those in need,

and their belief in the value of fairness in our justice system — the very heart of the Foundation's mission. We invite you to support the work of the Foundation — and make your investment in justice.

To learn more about charitable giving opportunities at the Foundation, please contact:

The Florida Bar Foundation
109 East Church Street, Suite 405
Post Office Box 1553
Orlando, FL 32802-1553
Toll free: 800.541.2195
Fax: 407.839.0287

From the Executive Director

This year, two accomplishments are particularly noteworthy, I think, as reflections of the Foundation's efforts to fulfill its mission and to be responsive to our principal constituents — the Florida Supreme Court, the legal profession, and our state's legal assistance organizations and the clients they serve:

Fundraising

A sampling of members of The Florida Bar told us several years ago that the Foundation was missing a bet by not engaging in traditional fundraising. We listened and did just that. Not that we expect to replace IOTA revenue anytime soon, but, we can raise funds to offset some, if not all, of the drops in IOTA revenue from interest rate cuts. And, we can make our case for support of special grant programs and initiatives such as children's legal services. Over the next three years, our program will focus on expanding the number of Foundation Fellows through campaigns in major Florida cities. At the same time, we will approach Florida attorneys and others capable of helping the Foundation achieve its mission through planned giving and major gift initiatives for special projects and programs, including gifts to The Florida Bar Foundation Endowment Trust. In addition, we will continue to encourage greater numbers of Florida Bar members to contribute to the Lawyers Challenge for Children on the annual Bar Fee Statement. Of course, a critical element of our fundraising program is close coordination of our fundraising activities with those of our grantees. We want to be sure that our fundraising successes are in addition to those of the organizations we support.

As reported elsewhere in this annual report, fundraising results to date are encouraging. It's been exciting to see how well the Foundation's board has stepped up to the plate, working through the development committee. On that committee, current and past Foundation officers and board members, Endowment trustees, former Bar presidents, and other leading Florida attorneys give readily of their time and talent to guide our fundraising efforts and participate directly in fundraising appeals. We are incredibly fortunate for their commitment to the Foundation's mission. Their enthusiasm for the work of the Foundation and our grantees is the best gauge of our ultimate fundraising success.

Communications

The Foundation's communications program was established in 2001 to achieve the following goals:

- To bolster visibility among members of Florida's legal community;
- To create an environment that encourages philanthropic gifts to the Foundation;
- To build a base of support for the Foundation's mission among key opinion leaders; and
- To become more responsive to ongoing media opportunities in order to comment on and support legal assistance to low-income clients, particularly work conducted by Foundation grantees.

Last summer, we launched our website: www.flabarfdn.org. This first phase of the website carries general information about the Foundation, our grant programs and grantees, assistance for attorneys and financial institutions in complying with the IOTA rule, and information for the media. Next up will be the ability to donate to the Foundation on-line and to make working with us as a board or committee member, grant applicant or grantee more efficient and effective through more on-line information and interaction.

We've also developed a new logo which can be seen — and we hope — admired in this annual report. In addition, we are revising and re-designing brochures and developing new materials for use by current and past Foundation officers and other supporters to talk about the Foundation and the work of its grantees to local bar associations, civic and business groups, etc.

Much more needs to be done, but we're committed to success in communicating more effectively about the Foundation — primarily by telling the stories of our grantee organizations, especially our legal aid grantees, as they work to protect the legal rights of the poor and vulnerable.

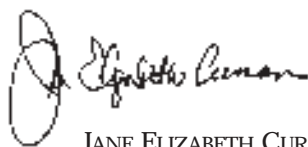
Special Thanks

These accomplishments were possible only because of the generous contributions of time, talent and energy of the many volunteers who serve on the Foundation's board of directors and committees, and our dedicated and professional staff.

Special thanks go as well to the attorneys who contributed to our successes through pro bono legal services to the Foundation itself:

- Richard E. Burke
Gray, Harris & Robinson, Orlando
- James C. Rinaman, Jr.
Marks, Gray, Conroy & Gibbs, Jacksonville
- Sylvia H. Walbolt
Carlton Fields, Tampa
- Gerald W. Weeden
Jacksonville
- Donald C. Works, III
Jackson, Lewis, et al, Orlando

This work to improve the Foundation's fundraising and communications efforts is undertaken to ensure that funding will always be available for the programs we serve. We are proud to provide the leadership and funding needed to achieve the goal of "equal justice for all" in Florida.



JANE ELIZABETH CURRAN
Executive Director

GOVERNANCE

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

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

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

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

Officers/Board Members Staff

The Florida Bar Foundation

2001-02 Officers and Board Members

Darryl M. Bloodworth
President

William L. Thompson, Jr.
President-Elect

Andrew M. O'Malley
Secretary/Treasurer

Designated Directors

Honorable Emerson R. Thompson, Jr.
Fifth District Court of Appeal

Honorable Nikki Ann Clark
Second Judicial Circuit Court

Terrence Russell
President – The Florida Bar

Tod Aronovitz
President-Elect – The Florida Bar

Herman J. Russomanno
Immediate Past President – The Florida Bar

Stephen C. Emmanuel
President, Florida Legal Services, Inc.

Public Members

Mrs. Georgina A. Angones
Mr. T. Glenn Jackson, Jr.

Directors

(terms expire 2002)

William S. Graessle

Kathleen S. McLeroy

Daryl D. Parks

Lawrence J. Phalin

Patrice J. Pilate

Honorable Florence Snyder Rivas

(terms expire 2003)

Jack P. Brandon

William H. Davis

Kelley C. Howard

Miles A. McGrane, III

John J. Schickel

Linda F. Wells

(terms expire 2004)

Bruce B. Blackwell

Patrick J. Casey

Philip Bruce Culpepper

John A. Noland

Adele I. Stone

John W. Thornton, Jr.

Endowment Trustees

Term Expires

Stephen E. Day June 30, 2002

Neal R. Sonnett June 30, 2003

James A. Baxter June 30, 2004

Rene V. Murai June 30, 2005

A. Hamilton Cooke June 30, 2006

Staff

Jane Elizabeth Curran
Executive Director

Paul C. Doyle
Director

Legal Assistance for Poor and Law Student
Assistance Grant Programs

Lou Ann Powell
Director of Finance

IOTA Revenues Remain Stable In FY 2001-02

In spite of continually declining interest rates, annual IOTA revenues remained stable at \$12 million in FY 2001-02 due to implementation of revisions to the IOTA Rule and increases in legal activity in Florida.

To increase revenues for IOTA's charitable purposes, on June 14, 2001, the Florida Supreme Court approved amendments to the IOTA Rule requiring banks to pay IOTA accounts the highest interest rate or dividend generally available to their similarly situated non-IOTA customers. Unfortunately, at the same time the

rule was amended, interest rates began a rapid decline. As a result, IOTA revenue increases from the rule amendments were lower than expected.

Nonetheless, banks across the state have been cooperative in implementing the rule amendments. Further, brokerage houses have contacted the Foundation to discuss offering government money market funds to increase IOTA revenues. For example, a 100 basis point increase in interest rates could generate an additional \$6 million in net IOTA revenues.



Peter M. Siegel, Randall C. Berg Jr., and Arthur J. England Jr.

The Foundation marked the 20th anniversary of implementation of Florida's IOTA program with a celebratory dinner in January during the Bar's mid-year meeting in Miami. The dinner was also a fundraiser with proceeds benefiting the Foundation's Children's Legal Services grant program.

Foundation President Darryl M. Bloodworth presided at the dinner, the highlight of which was presentation of three special awards honoring IOTA "pioneers" whose efforts were critical to establishment and implementation of Florida's IOTA program.

The Miami-based Florida Justice Institute and its principals Randall C. Berg, Jr. and Peter M. Siegel were recognized for their efforts to establish IOTA programs in other states. U.S. District Court Judge Donald M. Middlebrooks, then a partner in the Miami office of Steel, Hector & Davis, was

honored for his leadership in the effort to establish IOTA and for obtaining regulatory approvals necessary for IOTA's operation. Washington, D.C. tax attorney Henry G. Zapruder was recognized for his representation of the Foundation before the Internal Revenue Service which resulted in the Revenue Ruling on which all other IOLTA programs are modeled.

Reminiscences of IOTA's early years — including some memorable war stories — were offered by Berg and Middlebrooks as well as by Ft. Lauderdale attorney Russell E. Carlisle, president of the Foundation at the time IOTA was adopted, attorney L. David Shear, of Tampa, who chaired the original IOTA implementation commission and Arthur J. England, Jr., former chief justice of the Florida Supreme Court and author of the Court's opinions adopting and implementing the nation's first IOTA program.

Foundation Directors Honored For IOTA Rule Amendments

Two Foundation directors were recognized with the inaugural President's Award for Excellence by A. Hamilton Cooke of Jacksonville for securing amendments to the IOTA rule which calls for parity treatment in interest rates by participating financial institutions. Cooke, the Foundation president during 2000-01, announced the awards to Kathleen S. McLeroy and Andrew M. O'Malley at the June 2000 meeting of the Foundation's board of directors. He cited McLeroy's and O'Malley's work as essential to the Foundation's success in obtaining approval from the Florida Supreme Court for the rule amendments.

Excerpt from Award

"For successful efforts in helping The Florida Bar Foundation to achieve amendments to the IOTA Rule to increase funding for legal assistance to low-income Floridians made possible, in great measure, by your positive commitment, energy, wisdom and great wit."

Profile of the IOTA Account Portfolio as of June 2002

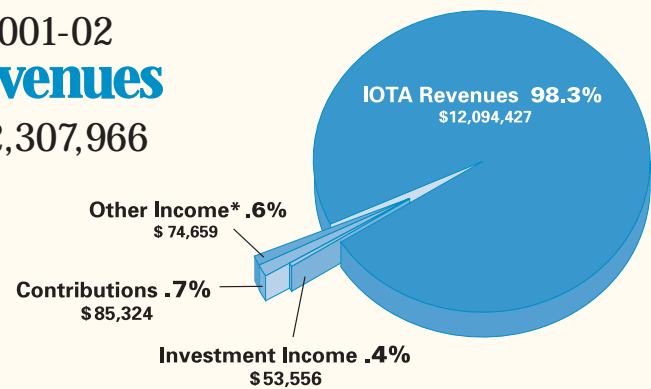
Total Number of IOTA Accounts	21,050
Total Principal Balance in IOTA Accounts	\$1.91 Billion
Average Balance per Accounts	\$92,200
Number of Lawyers Participating in IOTA	27,634
Number of Banks Participating in IOTA	303

FINANCIAL STATEMENTS

Complete financial statement presentation as audited by Averett, Warmus, Durkee, Bauder & Thompson is available upon request. The Foundation's IRS Form 990 is available on the Foundation's Web site at <http://www.flabarfndn.org/finance/form990.pdf>

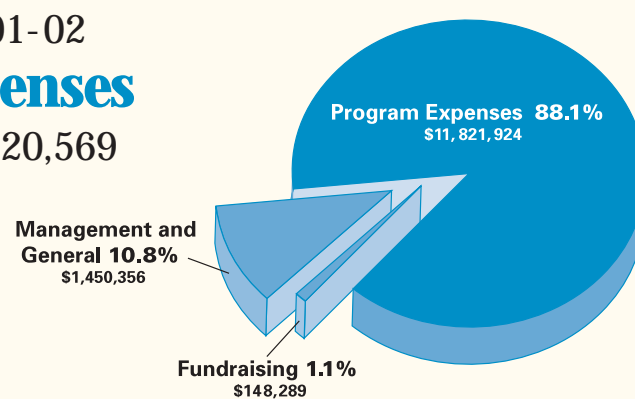
2001-02 Revenues

\$12,307,966



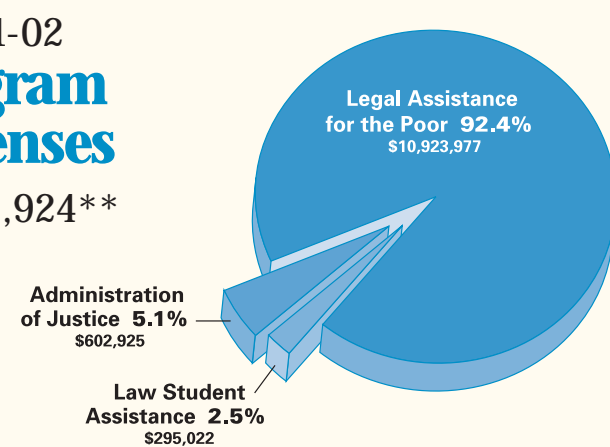
2001-02 Expenses

\$13,420,569



2001-02 Program Expenses

\$11,821,924**



LAP	Grants	\$10,860,377
	Program Related	(\$63,600)
AOJ	Grants	\$602,925
LSA	Grants	\$295,022

*Other income includes Return of Unspent Grant Funds and Other

**2001-02 Program Expenses are comprised of 2001-02 grants and program-related expenses and 2001-02 activity on conditional and multi-year grants.



The Florida Bar Foundation

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800-541-2195 | Tel: 407-843-0045 | Fax: 407-839-0287

E-mail: fbf@flabarfndn.org www.flabarfndn.org