**II**



**2018 IOLTA GRANT PROGRAM**

**PROVIDE LEGAL SERVICES**

**(LSC–Funded Model)**

**INSTRUCTIONS AND FORMS II**

**Notes regarding the process:**

Submitted documentation is reviewed thoroughly each year. The *current* challenges addressed by the organization are most relevant. Although word processing programs seductively offer the ability to “cut and paste” from a previous narrative, that process frequently results in errors, particularly as the application format always includes changes. PROOF CAREFULLY. It may be appropriate to use the same or similar verbiage from a prior year, but the use of an outdated application or answers to questions that were not posed for 2018 will not be looked upon favorably.

Make sure the specific activity for which IOLTA funds may be used is in compliance with the list of General Eligibility Standards (page A).

Before appending the required signature, make sure the organization has fully reviewed the Grant Agreement (page F) and will comply.

**Answer each question (found in the document “Application Questions – II”) and complete the package in the required page order explained on page C, “Application Format**.”

Note that the submission requirements (below) of the completed application are unyielding and must be followed exactly.

Please do not initiate contact with a member of the Foundation’s Board of Trustees or Grant Review Committee regarding the application. The organization will be contacted if further information is necessary.

**HOW TO SUBMIT A COMPLETED IOLTA GRANT APPLICATION:**

Completed, **HARDCOPY** applications must be returned by **UNITED STATES MAIL** postmarked no later than **WEDNESDAY (note the change in the day of the week), SEPTEMBER 13, 2017**. **THERE IS NO EXCEPTION TO THIS DEADLINE.**

Applicants should obtain a "**Certificate of Mailing**" or other **proof of mailing** and a **receipt**.

**Applications will NOT be accepted ELECTRONICALLY (email), by HAND DELIVERY, by OVERNIGHT DELIVERY or by FAX.**

**GENERAL ELIGIBILITY STANDARDS**

|  |
| --- |
| **The Board of Trustees will not make grants:**   1. **to political campaigns** 2. **to organizations designed primarily for lobbying** 3. **to support a specific activity that the local, state or federal government has an obligation to fund** 4. **to religious organizations where proselytizing is a part of the service provided.** |

To be **eligible** for an IOLTA grant, an organization must:

1. be exempt from taxation under Section 501(c)(3) of the United States Internal Revenue Code, as amended; OR
2. agree to use the IOLTA grant only for purposes that are charitable or educational within the meaning of Section 501(c)(3) of the United States Internal Revenue Code, as amended; AND
3. be an equal employment opportunity employer that does not discriminate on the basis of race, religion, marital status, color, national origin, sex, age or disability.

To be **eligible** for an IOLTA grant, an organization must **follow these procedures**:

1. submit its application pursuant to the guidelines by **United States mail** postmarked no later than Wednesday, September 13, 2017;
2. **respond adequately to any requests for additional information from the Committee;**
3. agree to carry out the project for which the IOLTA funds were requested;
4. agree that its completed application will be available for public inspection;
5. report on the progress of the project for which funds were granted; and
6. cooperate with data collection and evaluation requests of the Foundation or its representatives.

The Foundation reserves the right to change the procedures and priorities established in this program as the IOLTA funds grow or diminish and as needs change.

**IMPORTANT DATES**

Application Postmark Deadline: Wednesday, September 13, 2017

Announcement of Grant Awards: December 2017

The Board of Trustees plans to make the payment of 2018 IOLTA grants to Provide Legal Services in four, equal, quarterly installments on:

January 2, 2018 **In certain cases, such as one-time events,**

April 20, 2018 **payments may be made in other intervals as**

July 20, 2018 **determined by the Foundation's executive**

October 19, 2018 **director, in consultation with the recipient.**

Awards for 2018 **may** be paid via the ACH (Automated Clearing House) system directly into the bank account of successful applicants. If necessary, information required to make an ACH transaction will be solicited.

Each recipient of an IOLTA grant to Provide Legal Services must submit an assessment report, in accordance with the form provided, which describes how 2017 IOLTA funds have been spent, to the Executive Director of the Tennessee Bar Foundation by:

April 13, 2018

July 13, 2018

October 12, 2018

January 25, 2019

**The April, July and October payments will not be released until the assessment report has been received. Failure to submit such reports may result in the withholding of further installments of the IOLTA grant.**

**Application Format**

INSTRUCTIONS:

1. Prepare the application on 8 1/2" x 11" paper, single sided
2. Fasten the application pages securely in a permanent manner (heavy duty staples - preferred, spiral binding - acceptable, etc.) If any other portion of the application (e.g., finance report) is bound in another way, take it apart and use staples. **Black "bulldog" clips are not acceptable.**
3. Use the "IOLTA Grant Application Cover Sheet" (page D) as the **first/top page.** **DO NOT USE A BINDING PAGE - THE OFFICIAL COVER PAGE MUST BE VISIBLE.**

|  |
| --- |
| 1. **Submit the pages of EACH copy of the application in the following order**:    * + - Cover sheet (page D)        - Cover sheet – Part 2 (page E)        - Grant Agreement (page F)        - Budget Forms (pages G & H)        - Application narrative of questions and answers. First page of NARRATIVE should be numbered "1" – **Number all subsequent pages**.        - List of officers/directors/trustees of the organization with addresses *and term expiration dates* |

1. Application packet **must** include:
   1. the original application (clearly marked “original”), and **3 application copies**
   2. **2** copies of the most recent **audit or accounting report**
   3. **If necessary**, documents listed on page E (see instructions on that page)
2. Submit **the items above by United States mail, postmarked no later than Wednesday, September 13, 2017**. Applications will not be accepted electronically, by hand delivery, overnight delivery or by FAX.
3. Address the application to: Tennessee Bar Foundation

618 Church Street, Suite 120

Nashville, TN 37219-2456

**2018**

# TENNESSEE BAR FOUNDATION

**IOLTA GRANT APPLICATION COVER SHEET**

|  |
| --- |
| **PROVIDE LEGAL SERVICES**  **(LSC–Funded Model - II)** |

Name of Organization:

Organization website: Main office located in County

Counties where services are provided:

**Amount of IOLTA Funds Requested**: $ Are funds requested for a one-time event?

Check should be made payable to:

**Questions about this application and the proposed service should be directed to**:

(Name)

Address:

(Title) (Street, P. O. Box)

Telephone:

(City, State, Zip)

Email:

**Organization Chief Executive Officer:**

Address: Telephone:

(Street, P. O. Box)

Email:

(City, State, Zip)

**Chair of Board of Directors:**

Address: Telephone:

(Street, P. O. Box)

Email:

(City, State, Zip)

Is this a request for: an existing project? A new project? Project Name (if applicable):

Brief Project Description:

**To be sent a confirmation email when the completed application is received, provide an email address here:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**IOLTA GRANT APPLICATION COVER SHEET - PART 2**

The documents listed at the bottom of the page **must** be current and on file with the Tennessee Bar Foundation. Please act according to the proper category below:

1. If the organization has not applied for an IOLTA grant more recently than **2014**, submit one copy of listed documents in the application envelope and check the appropriate boxes below.

## OR

1. If the organization has applied more recently than **2014** AND submitted documents that are still in full force and effect, omit these items from the application envelope and check the appropriate boxes below.

### Included Submitted

**with application previously MANDATORY DOCUMENTS**

Proof of tax-exempt status (or a statement that the grant will be used only for purposes that are charitable or educational within the meaning of Section 501(c)(3) of the United States Internal Revenue Code).

Corporate charter

Bylaws

**GRANT AGREEMENT**

If granted IOLTA funds,

(Applicant Organization)

agrees:

1. To carry out the project described in this application;
2. To report to the Tennessee Bar Foundation on the progress of the project as required;
3. To return to the Foundation any funds not expended or committed for the purposes of the grant within the period stated;
4. To allow the Executive Director of the Tennessee Bar Foundation, members of the Grant Review Committee, the Board of Trustees or their designee to review, in person or otherwise, its actual use of IOLTA funds;
5. In some cases, grant payments will be held by the Foundation during the year, pending notice from grantee of the commencement of the specific project. If the project has not commenced, applicant will contact the Executive Director of the Foundation, in writing, by **July 13, 2018**, for guidance regarding the future availability of the award. If that contact is not made, the award may be forfeited;
6. The Foundation has no continuing obligation to make subsequent grants or otherwise finance any project of applicant’s organization beyond the grant period specified; and
7. It is in compliance with the General Eligibility Standards of the 2018 Tennessee Bar Foundation IOLTA Grant Program.

Date

Name of Applicant Organization

Signature of Program Director

Signature of Chair of Board of Directors

**BUDGET FORM**

Name of Organization

Fiscal Year to

Please complete the following form on a "grant year" basis, January 1 through December 31. Many organizations operate on a fiscal year, which does not coincide with this "grant year," but must be compared with the information provided by other applicants. Please add notes to this budget if additional explanation is necessary. **ROUND ALL NUMBERS TO THE NEAREST DOLLAR. DO NOT USE CENTS.**

This schedule (A) plus (B) should show the organization’s total budget.

|  |  |  |  |
| --- | --- | --- | --- |
| **Expenses:** | (A)  IOLTA Grant Budget | (B)  Annual Expense Budget  (excludes proposed grant) | **(C)**  **TOTAL: Grant Plus Budgeted Expenses**  **(A+B=C)** |
| A. Personnel Costs: |  |  |  |
| 1. Lawyers/Professionals (No.\_ ) | $\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 2. Others/Support (No.\_\_\_) | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 3. Employee Benefits | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| B. Non-Personnel Costs: |  |  |  |
| 1. Space | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 2. Equipment | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 3. Supplies | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 4. Telephone | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 5. Travel | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 6. Training | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 7. All Other | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **C. TOTAL EXPENSES:** | $\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**SOURCES OF ALL FUNDING**

**ROUND ALL NUMBERS TO THE NEAREST DOLLAR. DO NOT USE CENTS.**

|  |  |  |  |
| --- | --- | --- | --- |
| List each funding source and amount | (A)  IOLTA Program or Project | (B)  All Other Programs | **(C)**  **TOTAL BUDGET**  **(A+B=C)** |
| **1.** 2018 IOLTA grant request | $\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 2. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **3.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **4.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **5.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **6.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **7.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **8.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **9.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **10.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **11.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **12.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **13.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **14.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **15.** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **TOTAL REVENUE:** | **\_\_\_\_\_\_\_\_\_\_\_\_\_** | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |