



INTEREST ON LAWYERS' TRUST ACCOUNTS (IOLTA) FY 2017 GRANT APPLICATION INFORMATION & GUIDELINES

Grant Announcement

The Boston Bar Foundation (BBF) has announced that the 2017 IOLTA Grants application is now available. In Massachusetts, the Interest on Lawyers' Trust Account (IOLTA) Committee of the Supreme Judicial Court (SJC) collects interest income from participating financial institutions and distributes that income to three charitable entities. One of these entities is the Boston Bar Foundation, the philanthropic affiliate of the Boston Bar Association.

Grant applicants should not rely on past BBF grant making history as a predictor of the 2017 grant cycle. No program is assured of continued funding. It is likely that the amount available for BBF grant making will be considerably lower than in recent years.

The Massachusetts IOLTA Program

The Supreme Judicial Court Order limits the use of IOLTA to two purposes: 1) to provide civil legal services to low-income clients and/or 2) to improve the administration of justice. For more information please visit <http://www.maiolta.org>

The Boston Bar Foundation awards IOLTA funds through a highly competitive application process using review criteria that advance the SJC's mandated use of IOLTA funds.

Core Funding Objectives of Boston Bar Foundation IOLTA Grant Making

The Boston Bar Foundation invites applications from eligible non-profit organizations in the Greater Boston area for projects that advance the following objectives:

- Provide civil legal services to low-income persons and/or underserved populations, especially organizations and programs that respond to an identified and unmet legal need.
- Result in the development and strengthening of *pro bono* programs which generate substantial voluntary legal services by the private bar to low-income and underserved populations.
- Conduct activities that demonstrably contribute to the improvement of the administration of justice in Massachusetts, *i.e.*, projects that directly improve the courts' effectiveness, address systemic problems in the court system, or provide information to low-income, underserved or special needs populations regarding their legal rights and/or accessibility to the courts.

Eligibility for a Boston Bar Foundation IOLTA Grant

The Boston Bar Foundation awards IOLTA grants to organizations. No funding is available for individuals. Priority is given to 501(c)(3) organizations though under certain circumstances grants may be made to other 501(c) organizations with specific charitable programs that fit the BBF's guidelines and funding priorities.

The BBF's grant making focuses on organizations and programs in the Greater Boston area, *i.e.*, within Route 128. There are, however, limited exceptions: *e.g.*, when a determination is made by the Grants Committee that a substantial percentage of an organization's clients live within Greater Boston, even though the organization may technically be located beyond the boundary of Route 128.

The following are **excluded** from consideration for BBF IOLTA grants:

- Political campaigns; capital campaigns; endowment campaigns; scholarship funds; organizations established primarily to lobby; mock trial programs; law enforcement or correctional agencies; independent conferences/events, research and/or studies unrelated to a program that delivers legal services or improves access to justice for low-income or underserved populations; funds in support of travel, either by groups or individuals.

BBF IOLTA funding can be used only for programs that involve civil legal issues; programs involving criminal or delinquency legal issues cannot be funded by the IOLTA Grants Program.

IOLTA funds may not be used to support any social service or lobbying components of an applicant's proposed program, or to fund programs that provide for the constitutional or statutory obligations of government.

To receive IOLTA funds from the BBF, a grantee must comply with the following:

1. Submit a complete written proposal pursuant to BBF guidelines and format requirements, with an Executive Summary that is not to exceed one page.
2. Demonstrate a capacity to administer, implement, execute, and evaluate the program for which funds are granted in an effective and efficient manner.
3. Agree to submit a mid-year report of no more than four (4) pages and also a final report summarizing how the funds have been spent, activities undertaken, results attained, and valuable experience or products that could be shared with other agencies, as well as any other information requested by the Boston Bar Foundation.
4. Enter into a written agreement with the Boston Bar Foundation in which the applicant agrees to comply with all the grant policies of the BBF and carry out the program for which the funds are requested.
5. Deliver services to clients in a non-discriminatory manner without regard to the clients' race, gender, age, ethnicity, religion, sexual preference or national origin.
6. Publicly acknowledge the support of the Boston Bar Foundation in the organization's written materials.
7. Agree to cooperate with the BBF's grant management activities, *e.g.* site visits if necessary.

Grant Application Review Criteria

The Boston Bar Foundation awards IOLTA funds in a highly competitive application process using stringent review criteria. The BBF makes funding determinations for eligible non-profit grant applicants based on a number of criteria, including whether the program advances the core funding objectives of the IOLTA program, its financial stability, collaboration and efficient use of resources, its mission and demonstrated impact on the community.

- **Fiscal stability of the organization and/or sustainability of project**

The Boston Bar Foundation awards IOLTA grants to programs which demonstrate fiscal stability and that actively seek financial support from other sources. The BBF favors funding programs that minimize overhead costs and demonstrate a sound, long-term funding plan with a diversified revenue stream. Please note, financial statements and budgets will be carefully reviewed.

- **Organizational Mission & Impact**

The Boston Bar Foundation supports innovative and supportive civil legal services programs that provide direct representation/advocacy by an attorney for low-income clients on matters relating to legal needs and/or access to the justice system. It also supports programs that train *pro bono* attorneys to manage cases, especially in underserved areas of law.

In making its grant determinations, the BBF will consider organizational impact and effectiveness in fulfilling a compelling unmet legal need, as well as the number of clients served by each project (for projects that serve a relatively small client base, a determination will be made whether the project fills a crucial but unmet need). Grant applicants should clearly outline the legal needs the program will address, as well as the target population for the services.

For programs that seek to improve the administration of justice, preference is given to projects that demonstrably increase the efficiency of the court system and/or address systemic or access issues in the court system, particularly those that affect low-income, underserved or special needs populations.

- **Collaboration**

The Boston Bar Foundation favors projects and initiatives that collaborate with existing programs, avoid duplication of services and maximize available resources to serve unmet current or emerging legal needs. Projects that demonstrate an innovative approach to the delivery of legal services or access to justice through interdisciplinary collaboration with other service providers working with low income populations are particularly encouraged to apply.

Fiscal 2017 Grant Application Timetable

2017 BBF IOLTA Application Deadline:	February 24, 2017
Notification of Grantees:	June 2017
Disbursement of First Half Funds:	September 2017
Semi-Annual Progress Report Due:	March 2018
Disbursement of Second Half Funds:	March 2018
Year-End Report Due:	September 2018

Grant Application Review Procedures

All IOLTA grant applications submitted to the Boston Bar Foundation will be screened initially by the BBF staff to establish 1) the eligibility of the applicant to receive IOLTA funds, and 2) that the application is complete and includes the required documentation. Incomplete grant applications may be disqualified from consideration.

All applications will then be submitted to the Boston Bar Foundation Grants Committee, which will review the applications received and submit their recommendations to the Board of Trustees of the Boston Bar Foundation for approval. There is no appeal process for funding decisions.

ELECTRONIC SUBMISSIONS ARE STRONGLY ENCOURAGED

All paper proposals should be submitted on single side 8 ½" x 11" paper, unbound. Please **DO NOT STAPLE** application materials.

Application Deadline & Submission Information:

Fiscal Year 17 BBF IOLTA Grant applications should be submitted by e-mail, U.S. Mail or by hand. Email is preferred.

On or before 5:00pm on Friday February 24, 2017:

Email: cforcellati@bostonbar.org

**Attn: Cara Forcellati
Boston Bar Foundation
16 Beacon Street
Boston, Massachusetts 02108**

For questions or additional information regarding the application process, please contact: Cara Forcellati at 617-778-1958 or via e-mail: cforcellati@bostonbar.org.



Interest on Lawyers' Trust Accounts (IOLTA) and Legal Service Grants

Grant Application - Fiscal Year 2017

For Grantee Funding Period: September 1, 2017 - August 31, 2018

Deadline for Application Submission: FEBRUARY 24, 2017

Organization: _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

Phone: _____ **Fax:** _____

Website: _____

Executive Director: _____

Executive Director Email: _____

Project Name (if applicable): _____

Amount Requested: \$ _____ **% of Organizational Budget** _____ **% of Project Budget**

Tax ID Number: _____ **Type:** 501(C)(3) 501(C)(6) OTHER: _____

_____ agrees to carry out the activities described in this proposal, if granted funds by the Boston Bar Foundation, and to report to the Boston Bar Foundation on the progress and results as requested by the Boston Bar Foundation.

Date: _____ **Signature:** _____

Title: _____ **Print Name:** _____

Budget Sheet – Expenses: Organization: _____

[Please click here to download the excel version of this section.](#)

Executive Summary: Organization: _____

Please provide the following information. You may copy and fill out this Executive Summary or create your own one page version using the headings below.

1. **Contact person (if different from Executive Director):**

Name: _____ **Title:** _____

Phone: _____ **Email:** _____

2. **Total organization budget: \$** _____

3. **Type of Funding Request:** General Operating Support Project-related funding

If Project funding: New Project Existing Project

4. **If funding is sought for a new (0-3 years) project, briefly:**

a) Describe the demonstrated need for the new (0-3 years) project; b) outline plans for long-term sustainability, i.e. proposed sources of funding beyond the BBF IOLTA grant; and c) describe how the BBF grant could be leveraged to secure other funding and support for this project.

5. **Category:**

Delivery of Civil Legal Services to the Poor

Administration of Justice

Sub-Category: Check all that are applicable to your organization or project

Consumer

Family

Immigration

Education

Health

Welfare/Benefits

Employment

Housing

Other*

*Other, i.e. Domestic Violence, Prisoners' issues, Sexual Assault, Veterans' issues, etc. (describe below):

6. **Short summary (4 sentences) of the organization's mission and if applicable the request's purpose.**

7. **Short summary (4 sentences) of the request and its strategic link with the missions of the [BBF](#) and the [IOLTA program](#).**

8. **Describe the target population and approximate number of clients served annually.**

9. **Describe the geographic reach of the organization/project. Is the organization/project limited to Greater Boston (i.e., within Route 128)? If not, what percentage of the clients served live within Greater Boston/Route 128?**

Narrative - Organization:_____

[Please click here to download the Word version of the Grant Proposal Narrative](#)

Attachments – Please attach the following:

1. **Audit:** Attach copy of most recent audit report (one copy only) in the appendix. If not subject to an audit, attach most recent financial statement and copy of most recent IRS Form 990.
2. **Proof of Tax Exempt Status:** If organization is a recognized tax-exempt organization, attach a copy of IRS determination letter(s) in the appendix. If not, describe the charitable activities.
3. **Governing Board:** Attach a list of the current Trustees/Directors.