

THE PHILADELPHIA BAR FOUNDATION

Promoting Access to Justice for all Members of the Community

Grantmaking Guidelines and Grant Application Packet 2011

INTRODUCTION

The Philadelphia Bar Foundation is dedicated to promoting access to justice for members of the community struggling with poverty, abuse and discrimination. The Bar Foundation is the embodiment of the Philadelphia legal community's commitment to this fundamental principle. We accomplish this mission by providing grants and technical assistance in support of quality legal services, addressing unmet legal needs, and providing education on matters in the public interest.

Grants are a fundamental part of the Bar Foundation's comprehensive access to justice program. Grants are awarded in support of the following: 1) **General Operations**; 2) **Special Projects**; and 3) **Special Circumstances**.

TYPES OF FINANCIAL ASSISTANCE PROVIDED

General Operating Support: The Bar Foundation prides itself on being one of the few sources of unrestricted operating support for legal services agencies. The Bar Foundation provides this support to agencies providing access to free or low-cost legal services via staff-based legal assistance, or to agencies that recruit, train and support volunteer attorneys. By providing general operating support, the Bar Foundation enables these organizations to pursue an array of legal strategies in order to best serve the direct legal representation needs of their clients.

Project Support: The Bar Foundation also provides support for specific projects that (1) address emerging issues; (2) address gaps in the legal aid delivery system; or (3) uniquely promote access to justice.

Special Circumstances: When possible, the Bar Foundation provides special support to enable a current grantee to respond to a financial situation not previously known or not reasonably foreseeable. Special circumstances grants might also be used to assist the grantee to take a proactive stance in addressing an issue that is critical to its mission. Special Circumstances grants are subject to the availability of funds and may constitute an advance on any award that would otherwise be considered during the Foundation's current grant cycle.

GENERAL CONDITIONS

The Bar Foundation is typically unable to fund all amounts requested, so applicants are encouraged to submit reasonable requests and proposals that adhere to the Bar Foundation's grantmaking guidelines. Also, the Bar Foundation provides no guarantee that any particular project or organization will receive funding. The Foundation reserves the right to reject any and all proposals, in whole or in part, at any time, in its sole discretion. All materials submitted to the Bar Foundation become the property of the Foundation and will not be returned.

The Bar Foundation, at its discretion, may request a site visit and/or additional information to assist in review and evaluation of the proposal.

Grantees are responsible for the proper expenditure of funds and for maintaining adequate supporting records consistent with generally accepted accounting practices. The Bar Foundation must be notified of any significant changes in a grantee's financial condition, mission, structure or personnel (especially management staff) during the grant period.

The Bar Foundation does not make multi-year grants.

Finally, please provide copies of any press notification or public recognition of the Bar Foundation's support.

GRANT APPLICATION GUIDELINES

A. Timeline:

- Proposals are due to be received at the Philadelphia Bar Foundation office by June 17, 2011
- Proposals are reviewed June – September 2011
- Presentations and/or site visits (as determined by the Grants Committee) will be conducted between June and September 2011
- Funding decisions are made in November
- Grants are made in December

B. Eligibility

- The applicant must qualify as a tax-exempt non-profit organization pursuant to Section 501(c)(3) of the Internal Revenue Code. The Bar Foundation places a high priority on those applicants providing direct delivery of legal services to residents of Philadelphia.
- Eligible applicants will be assessed pursuant to the Grantmaking Factors set forth below.

C. Grantmaking Factors

Does the applicant advance the Bar Foundation's mission to promote access to justice?

- Does the applicant provide free legal representation, or access to free or low-cost legal representation to members of the community struggling with issues including (but not limited to) poverty, abuse or discrimination?
- Does the applicant provide services that advance the public interest through the legal process?

Is the applicant effective? Among possible measures of effectiveness are:

- Receives high satisfaction ratings in client surveys
- Pursues an array of strategies and programs to advance its mission;
- Has a demonstrated reputation for substantive excellence;

- Achieves measurable results, e.g., public policy changes, legislative victories, increased number of constituents served, increased pro bono participation, etc.
- Produces seminal publications;
- Coordinates services with related organizations.

Is the applicant well-managed?

- Has developed and implemented effective criteria to measure its success;
- Has a strategic plan/business plan;
- Has submitted IRS 990 forms in a timely manner (please attach most recent 990)
- Has a strong, supportive, engaged board;
- Has a development plan that is organized and diversified;
- Has sound financial reports;
- Has a highly qualified staff.

GRANT APPLICATION CHECKLIST

Please submit Grant Application via email to LBrown@philabar.org or by hard copy postmarked no later than June 17, 2011 to:

Grants Committee
Philadelphia Bar Foundation
1101 Market Street, 11th floor
Philadelphia PA 19107

1. Grant Application Cover Page (see attached form).
2. Organization Data Sheet (see attached form).
3. Proposal Narrative
 - No more than **five pages** containing the information described in the next section.
4. Board and Staff Information
 - Please include the names and affiliations of the Board of Directors, and the names, roles and backgrounds of key management staff
5. Financial Information
 - A statement of income and expenses from last fiscal year;
 - A detailed budget showing expected income and expenses for the current fiscal year;
 - The most recent audit; and, if the organization is a new applicant, a copy of the letter from the IRS confirming the organization's tax exempt status.
 - Proposals submitted for Project Support also should include a detailed budget for the project.
6. Attachment A—Raising the Bar Donations during the calendar year 2010 (see attached form).
7. Attachment B— Request for Additional Information (see attached form).

For more information regarding the Philadelphia Bar Foundation's grant application guidelines and grantmaking process, contact Lynne Brown, Deputy Executive Director at (215) 238-6347 or lbrown@philabar.org.

PROPOSAL NARRATIVE INFORMATION GUIDELINES

Proposals should address the information requested below, but should not exceed five pages.

1. Please give a brief description of the organization including its history, mission and long term vision. If funding is sought for a special project, please describe the project's scope and how it fits with the organization's mission.
2. Please describe the goals that were met and accomplishments achieved by the organization in the past fiscal year. Include information about any recognition or awards your organization received.
3. Briefly describe the legal, political and economic challenges or emerging issues facing your organization in the coming year. Include an assessment of the needs to be met and the communities to be served. (Please include information on the income guidelines you use to determine eligibility for legal assistance, if any.)
4. Briefly describe the organization's work plan and goals and objectives for the current fiscal year. In particular, describe initiatives or activities designed to produce a higher level of organizational functioning and/or any designed to increase service to clients. How will the achievement of these goals and objectives be measured?
5. Provide a brief summary of any collaborative efforts with other organizations, including the identity of the organizations and the nature of the projects on which you are collaborating.

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Grant Application Cover Page

Applicant Information:

Legal Name of Organization

Project Name (if different)

Legal Address

Phone/Email/Fax

Website:

Contact Person

Name/Title

Email

Executive Director

Name

Email

Agency Budget

Agency Fiscal Year begins/ends

Amount Requested

Staff Information:

Total paid staff: _____ **# Attorneys:** _____
Paralegals: _____ **# Support Staff:** _____

Pro Bono Information

Pro Bono Attorneys: _____ **# Pro Bono Cases:** _____
Approx. # Pro Bono Hours: _____ **# Pro Bono Clients** _____

I certify that the attached copy of our IRS determination letter, which states we are tax-exempt, is still in effect.

Signature of Executive Director

Date

THE PHILADELPHIA BAR FOUNDATION

Organization Data Sheet

CASE AND CLIENT DATA	
For 12-month period from:	to

SUBJECT MATTER	NUMBER OF CASES	NUMBER OF CLIENTS
Poverty		
Civil Rights		
Public Benefits		
Family Law		
Juvenile Law		
Health		
Immigration		
Elder Law		
Disabilities		
Consumer Finance		
Other (please specify)		
Total Cases:		

ATTACHMENT A

DONATIONS FROM RAISING THE BAR LAW FIRMS

Law Firm	2010 Donation
1. Archer & Greiner, PC	_____
2. Badey, Sloan and DiGenova	_____
3. Ballard Spahr LLP	_____
4. Berger & Montague PC	_____
5. Blank Rome, LLP	_____
6. Buchanan Ingersoll & Rooney PC	_____
7. Caesar, Rivise, Bernstein, Cohen & Pokotilow, Ltd.	_____
8. Law Offices of Lenard A. Cohen, PC	_____
9. Conrad O'Brien, P.C.	_____
10. Cozen O'Connor	_____
11. Dechert LLP	_____
12. Drinker Biddle & Reath LLP	_____
13. Duane Morris, LLP	_____
14. Duffy + Partners	_____
15. Eckert Seamans Cherin & Mellott, LLP	_____
16. Eisenberg, Rothweiler, Winkler, Eisenberg and Jeck, P.C.	_____
17. Feldman, Shepherd, Wohlgelernter, Tanner & Weinstock	_____
18. Fox Rothschild LLP	_____
19. Gay Chacker & Mittin, PC	_____
20. Giacobetti & Levant	_____
21. Sydney L. Gold & Associates, PC	_____
22. Law Offices of Bernard M. Gross, PC	_____
23. Hangleby Aronchick Segal & Pudlin	_____
24. Harkins Cunningham, LLP	_____
25. Howard, Brenner and Nass, PC	_____
26. Hoyle Fickler Herschel & Mathes LLP	_____
27. Josel & Feenane, P.C.	_____
28. Klasko, Rulon, Stock & Seltzer, LLP	_____
29. Kleinbard Bell & Brecker LLP	_____
30. Kline & Spector, PC	_____
31. Kohn, Swift & Graf, P.C.	_____
32. Kovler and Rush, PC	_____
33. Littler Mendelson, PC	_____
34. Margolis Edelstein	_____
35. Marshall, Dennehey, Warner, Coleman & Goggin	_____
36. Martin, Banks, Pond, Lehocky & Wilson	_____
37. McCann & Geschke, PC	_____
38. McCarter & English, LLP	_____

