

THE PHILADELPHIA BAR FOUNDATION

Promoting Equal Access to Justice for all Members of the Community

Grantmaking Guidelines and Grant Application Packet 2017

INTRODUCTION

The Philadelphia Bar Foundation is dedicated to promoting equal access to justice for all members of the community particularly those 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 work. 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 funds for legal services agencies. The Bar Foundation provides this support to agencies providing free or low-cost legal services via staff-based legal assistance, or to agencies that recruit, train, and support volunteer attorneys, or to agencies whose work promotes equal access to justice by providing education on matters in the public interest. By providing general operating support, the Bar Foundation enables these organizations to pursue an array of 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 a current 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 Bar Foundation's current grant cycle. Agencies with acute needs should feel free to communicate those to the Bar Foundation prior to the May 31st deadline.

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

Grantees are responsible for the proper expenditure of funds and for maintaining adequate 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 the 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 currently 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:
 - Grant Applications should be received at the Philadelphia Bar Foundation office by **May 31, 2017**.
 - Proposals are reviewed June – September 2017.
 - Presentations and/or site visits (as determined by the Grants Committee) will be conducted between June and September 2017.
 - Funding decisions are made in December.
 - 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 equal 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:

- Achieves measurable results, e.g., increased number of constituents, successful client outcomes based on specific metrics, high satisfaction ratings in client surveys, increased pro bono participation, public policy changes, legislative victories, etc.;
- Pursues an array of strategies and programs to advance its mission;
- Has a demonstrated reputation for substantive excellence;
- Produces seminal publications;
- Coordinates services with related organizations.

Is the applicant well-managed?

- Has developed and implemented effective criteria to measure its operational and programmatic 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 (Please attach the most recent audit);
- Has a highly qualified staff.

GRANT APPLICATION CHECKLIST

Please submit your Grant Application via email to jhilburnholmes@philabarfoundation.org no later than **May 31, 2017** -- with the subject line: 2017 PBF Grant Application.

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 (new applicants, please provide two years).
 - 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.
 - The most recent IRS Form 990 as submitted.
 - 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 2016 (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 Jessica R. Hilburn-Holmes, Executive Director at (215) 238-6347, or jhilburnholmes@philabarfoundation.org.

PROPOSAL NARRATIVE INFORMATION GUIDELINES

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

***For projects that are part of a larger nonprofit organization (e.g., a law project within a larger social services agency) please submit responses that pertain to the law project.*

1. **Organization overview**
Please give a brief description of the organization including its history, mission, and long term vision. Include information about legal, political, and economic challenges the organization is facing. If funding is sought for a special project, please describe the project's scope and how it fits with the organization's mission.
2. **Past fiscal year goals met & accomplishments achieved**
Please describe the goals that were met and accomplishments achieved in the past fiscal year. You may include information on both programmatic and operational/organizational goals and accomplishments.
3. **Current fiscal year work plan**
Describe the organization's work plan for the current fiscal year. Describe any emerging issues being addressed or new constituents being served. List and describe the top 5 to 10 organizations with whom you collaborate as part of your work, including both legal and non-legal organizations. Include any plans for future collaborations. Be sure to provide information about any cooperative work arrangements you may have with area law schools.
4. **Measurements and outcomes**
Briefly describe how your organization measures and evaluates its impact.



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/Project 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



Organization Data Sheet

BRIEFLY DESCRIBE ANY INCOME GUIDELINES USED TO DETERMINE ELIGIBILITY FOR YOUR SERVICES:

CASE AND CLIENT DATA :

For 12-month period from: _____ to: _____

Subject Matter	DIRECT SERVICE		IMPACT LITIGATION		POLICY ADVOCACY / PUBLIC EDUCATION	
	# Cases	# Clients	# Cases	# People Affected	# Campaigns	# People Affected
Assault / Abuse						
Bankruptcy/Finance						
Civil Rights						
Consumer Protection/ Fraud/						
Disabilities						
Education						
Elder Law						
Employment						
Family Law						
Health						
Housing						
Immigration						
Juvenile Law						
Public Benefits						
Other (please specify):						
Total Cases / Campaigns:						

ATTACHMENT A

DONATIONS FROM RAISING THE BAR LAW FIRMS

Law Firm	2016 Donation
1. Abrams and Ingersoll LLP	
2. ADR Options, Inc.	
3. Ahmad Zaffarese & Smyler, LLC	
4. Akin Gump Strauss Hauer & Feld LLP	
5. Alva & Associates	
6. Archer & Greiner P.C.	
7. Badey, Sloan and DiGenova P.C.	
8. BakerHostletler	
9. Ballard Spahr LLP	
10. Bazelon Less & Feldman PC	
11. The Beasley Firm, LLC	
12. Berger & Montague, P.C	
13. Berner Klaw & Watson LLP	
14. Blank Rome LLP	
15. Bochetto & Lentz, P.C.	
16. Boni & Zack LLC	
17. Law Offices of Paul Boni, P.C.	
18. Borghese Law Firm LLC	
19. Britt, Hankins & Moughan	
20. Brookman, Rosenberg, Brown & Sandler	
21. Buchanan Ingersoll & Rooney, PC	
22. Caesar, Rivise, Bernstein, Cohen & Pokotilow, Ltd.	
23. Caroselli, Beachler, McTiernan & Conboy, L.L.C.	
24. Chimicles & Tikellis LLP	
25. Christie and Young, PC	
26. Ciardi Ciardi & Astin	
27. Clark Hill PLC	
28. Cohen, Placitella & Roth PC	
29. Law Offices of Lenard A. Cohen, PC	
30. Conrad O'Brien PC	
31. Console Law Offices, LLC	
32. Cozen O'Connor	
33. Dechert LLP	
34. DLA Piper LLP (US)	
35. DeFino Law Associates, P.C.	
36. Dilworth Paxson LLP	



- 37. DLA Piper _____
- 38. Donovan Axler, LLC _____
- 39. Drinker Biddle & Reath LLP _____
- 40. Duane Morris LLP _____
- 41. Duffy + Partners _____
- 42. Eckert Seamans Cherin & Mellott, LLC _____
- 43. Eisenberg, Rothweiler, Winkler, Eisenberg and Jeck, P.C. _____
- 44. Emmanuel Law Firm, LLC _____
- 45. The Ezold Law Firm, P.C. _____
- 46. Faruqi & Faruqi, LLP _____
- 47. Feldman Shepherd Wohlgerlenter Tanner & Weinstock LLP _____
- 48. Fine, Kaplan and Black, R.P.C. _____
- 49. Fineman Krekstein & Harris P.C. _____
- 50. Flaster Greenberg PC _____
- 51. Flitter Milz, P.C. _____
- 52. Fox Rothschild LLP _____
- 53. Freeman Law Offices, LLC _____
- 54. The Fullam Firm, P.C. _____
- 55. Galfand Berger LLP _____
- 56. Gay Chacker & Mittin, P.C. _____
- 57. Law Offices of Alexander Giacobetti _____
- 58. Gibbons P.C. _____
- 59. Goldberg Miller & Rubin, P.C. _____
- 60. Golomb & Honik, PC _____
- 61. Sidney L. Gold & Associates, P.C. _____
- 62. Gould Yaffe & Golden _____
- 63. Greenberg Traurig, LLP _____
- 64. Law Offices of Judy Greenwood, P.C. _____
- 65. Griesing Law LLC _____
- 66. Law Offices, Bernard M. Gross, P.C. _____
- 67. Haggerty, Goldberg, Schleifer & Kupersmith, P.C. _____
- 68. Hangley Aronchick Segal Pudlin & Schiller _____
- 69. Harkins Cunningham LLP _____
- 70. The Law Firm of Harper & Paul _____
- 71. Harrington & Caldwell PC _____
- 72. Hofstein Weiner & Meyer, P.C. _____
- 73. Hogan Lovells US LLP _____
- 74. Law Offices of Thomas More Holland _____
- 75. Hoyle, Fickler, Herschel & Mathes LLP _____
- 76. Jacoby Donner, P.C. _____
- 77. Josel & Feenane, P.C. _____
- 78. Kairys, Rudovsky, Messing & Feinberg LLP _____

- 79. Kessler Topaz Meltzer & Check, LLP _____
- 80. Klasko Immigration Law Partners, LLP _____
- 81. Klehr Harrison Harvey Branzburg LLP _____
- 82. Kleinbard LLC _____
- 83. Kline & Specter, P.C. _____
- 84. Kohn, Swift & Graf, P.C. _____
- 85. Kovler & Rush, P.C. _____
- 86. Donald A. Krain Attorney _____
- 87. Lamb McErlane PC _____
- 88. Langer, Grogan & Diver P.C. _____
- 89. Langsam Stevens Silver & Hollaender LLP _____
- 90. Lavin, O'Neil, Cedrone & DiSipio _____
- 91. Levin, Fishbein, Sedran & Berman _____
- 92. The Law Office of Michael D. LiPuma _____
- 93. Law Offices of Arline Jolles Lotman _____
- 94. Leventhal Sutton & Gornstein _____
- 95. Littler Mendelson P.C. _____
- 96. Malone LLC _____
- 97. Margolis Edelstein _____
- 98. Markowitz & Richman _____
- 99. Marshall Dennehey Warner Coleman & Goggin, P.C. _____
- 100. Martin Law _____
- 101. Maschmeyer Karalis PC _____
- 102. McAndrews Law Offices, P.C. _____
- 103. McCann & Geschke, P.C. _____
- 104. McCarter & English, LLP _____
- 105. McCausland & McCausland LLC _____
- 106. McLaughlin & Lauricella, P.C. _____
- 107. McMonagle, Perri, McHugh & Mischak _____
- 108. McNees Wallace & Nurick LLC _____
- 109. Law Offices of John S. McVeigh, P.C. _____
- 110. Messa & Associates, P.C. _____
- 111. Metzger & Kleiner _____
- 112. Montgomery McCracken Walker & Rhoads LLP _____
- 113. Morgan, Lewis & Bockius LLP _____
- 114. Nass Cancelliere Brenner _____
- 115. NastLaw LLC _____

- 116. Obermayer Rebman Maxwell & Hippel LLP _____
- 117. Ogletree, Deakins, Nash, Smoak & Stewart, P.C. _____
- 118. Panitch Schwarze Belisario & Nadel LLP _____
- 119. Pansini Law Group _____
- 120. Pepper Hamilton LLP _____
- 121. Pinnola & Bomstein _____
- 122. Post & Schell, P.C. _____
- 123. Prickett, Jones & Elliott, P.A. _____
- 124. Rand Spear _____
- 125. Raynes McCarty _____
- 126. Reed Smith LLP _____
- 127. Rosen, Schafer & DiMeo LLP _____
- 128. Ross Feller Casey, LLP _____
- 129. Sacchetta & Baldino _____
- 130. Law Office of Jeffrey S. Saltz, P.C. _____
- 131. Saltz Mongeluzzi Barrett & Bendesky, PC _____
- 132. Sandals & Associates, P.C. _____
- 133. Saul Ewing LLP _____
- 134. Schnader Harrison Segal & Lewis LLP _____
- 135. Segal McCambridge Singer & Mahoney, Ltd. _____
- 136. Sheller, P.C _____
- 137. Shrager, Spivey & Sachs _____
- 138. Shulick Law _____
- 139. Sidkoff, Pincus & Green P.C. _____
- 140. Law Offices of Daniel J. Siegel, LLC _____
- 141. Solomon, Sherman & Gabay _____
- 142. Soloff & Zervanos, P.C. _____
- 143. Spector Roseman Kodroff & Willis, P.C. _____
- 144. Stevens & Lee _____
- 145. Stradley Ronon Stevens & Young, LLP _____
- 146. Stuart Leon Law Office _____
- 147. Swartz Campbell LLC _____
- 148. Tactix Real Estate Advisors, LLC _____
- 149. Teeters Harvey Marrone & Kaier LLP _____
- 150. Law Offices of Thalheimer & Palumbo P.C. _____
- 151. Tucker Law Group, LLC _____
- 152. Villari, Brandes & Giannone P.C. _____
- 153. Volpe and Koenig, P.C. _____
- 154. Wapner Newman Wigrizzer Brecher & Miller _____
- 155. Weber Gallagher Simpson Stapleton Fires & Newby LLP _____
- 156. Welsh & Recker _____



- 157. The Weinstein Firm, LLC _____
- 158. Weir & Partners LLP _____
- 159. Weiser Law Firm P.C. _____
- 160. Wetzel Gagliardi & Fetter LLC _____
- 161. White and Williams LLP _____
- 162. Willig, Williams & Davidson _____
- 163. Wilson Elser Moskowitz Edelman & Dicker LLP _____
- 164. Law Office of Rhonda Hill Wilson, P.C. _____
- 165. Winebrake & Santillo, LLC _____
- 166. Winston Law Firm, LLC _____
- 167. Wisler Pearlstine, LLP _____
- 168. Young Conaway Stargatt & Taylor, LLP _____
- 169. Zarwin Baum DeVito Kaplan Schaer & Toddy, P.C. _____
- 170. OTHER _____

ATTACHMENT B

REQUEST FOR ADDITIONAL INFORMATION

1. The Bar Foundation wants to help communicate the impact continuing cuts in funding have on your work. If you have sustained cuts in the last fiscal year, please indicate what funding source(s) decreased (e.g., Regional/National/Family Foundations, LSC, IOLTA or other sources), and describe the effect of the decrease(s) in funding (e.g., degradation in capacity to provide services, lay-offs, postponement of programs, etc.).

2. The Bar Foundation is committed to promoting awareness of the mission and works of each of its grantees, as well as raising overall public understanding of the access to justice challenges and achievements in our region. To assist in this collective effort, please include the following items, which will be considered as part of your overall grant application. The content provided may be reproduced by the Philadelphia Bar Foundation, in print as well as social media marketing and public relations efforts including, for example, the Annual Report. NOTE: Items (c), (d), and (e) below are new to the Foundation's 2017 Grant Application.
 - a. A short statement (approximately three sentences) about your work and what impact a Philadelphia Bar Foundation grant has had and/or will have on your organization and its mission;
 - b. A few photographs (or other digital artwork) highlighting your mission;
 - c. Concise summaries (approximately one short paragraph for each case) of two success stories achieved in the most recent fiscal year for clients (preferred) or advocacy initiatives, which best reflect the mission of your organization;
 - d. A brief description (including times and locations) of two events or activities scheduled over the next few months which are representative of your mission and program priorities;
 - e. The links to sections of your website, if available, that best show:
 - i. Outcome and impact information/data about your work;
 - ii. Media stories published about your organization and its work;
 - iii. Newsletters, alerts, updates, or other communications issued as outreach;
 - iv. Descriptions of the recent litigation and/or advocacy of your organization.