

THE PHILADELPHIA BAR FOUNDATION

Promoting Equal Access to Justice for all Members of the Community

Grantmaking Guidelines and Grant Application Packet 2018

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 removing barriers to justice, engaging the community on behalf of legal aid, and strengthening the civil legal aid system.

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 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, 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 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 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 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 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:

- Proposals should be received at the Philadelphia Bar Foundation office by May 31, 2018.
- Proposals are reviewed June – September 2018.
- Presentations and/or site visits (as determined by the Grants Committee) will be conducted between June and September 2018.
- Executive Director interviews take place in September 2018.
- 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:

- 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; and/or

- 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 your Grant Application via email to jhilburnholmes@philabarfoundation.org no later than June 1, 2018 with the subject line: **2018 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.
 - 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 2017 (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 grant making 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. Provide a brief summary of any collaborative efforts with other organizations. **Please be sure to include 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.

THE PHILADELPHIA BAR FOUNDATION

Promoting Access to Justice for all Members of the Community

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

THE PHILADELPHIA BAR FOUNDATION

Organization Data Sheet

Briefly describe any income guidelines you use to determine eligibility for assistance:

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

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

DONATIONS FROM RAISING THE BAR LAW FIRMS

Law Firm	2014 Donation
1. Abrams and Ingersoll LLP	
2. ADR Options, Inc.	
3. Ahmad Zaffarese 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 (formerly Woodcock Washburn, LLC)	
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, LLC.	
24. Chimicles & Tikellis LLP	
25. Christie Pabarue and Young	
26. Ciardi Ciardi & Astin	
27. Clark Hill PLC	
28. Cohen, Placitella & Roth PC	
29. Law Offices of Lenard A. Cohen, P.C.	
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 LLC (US)	

- 38. Donovan Axler LLC _____
- 39. Drinker Biddle & Reath LLP _____
- 40. Duane Morris, LLP _____
- 41. Duffy + Partners _____
- 42. Eckert Seamans Cherin & Mellott, LLP _____
- 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 Wohlgelelrnter Tanner & Weinstock LLP _____
- 48. Fine, Kaplan & Black, R.P.C. _____
- 49. Fineman Krekstein & Harris P.C. _____
- 50. Flaster/Greenberg _____
- 51. Flitter Lorenz P.C. _____
- 52. Fox Rothschild LLP _____
- 53. Freeman Law Offices, LLC _____
- 54. Fullam Firm. P.C. _____
- 55. Galfand Berger LLP _____
- 56. Gay Chacker & Mittin, P.C. _____
- 57. Giacobetti & Levant _____
- 58. Gibbons P.C. _____
- 59. Goldberg Miller & Rubin P.C. _____
- 60. Golomb & Honik _____
- 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. Nass Cancelliere Brenner _____
- 76. Hoyle, Fickler, Herschel & Mathes LLP _____
- 77. Jacoby Donner, P.C. _____
- 78. Josel & Feenane, P.C. _____
- 79. Kairys, Rudovsky, Messing & Feinberg LLP _____

- 80. Kessler Topaz Meltzer & Check, LLP _____
- 81. Klasko Immigration Law Partners, LLP _____
- 82. Klehr Harrison Harvey Branzburg LLP _____
- 83. Kleinbard LLC _____
- 84. Kline & Specter, P.C. _____
- 85. Kohn, Swift & Graf, P.C. _____
- 86. Kovler & Rush, P.C. _____
- 87. Donald A. Krain Attorney _____
- 88. Lamb McErlane PC _____
- 89. Langer, Grogan & Diver P.C. _____
- 90. Langsam Stevens Silver & Hollaender LLP _____
- 91. Lavin, O'Neil, Cedrone & DiSipio _____
- 92. Levin, Fishbein, Sedran & Berman _____
- 93. The Law Office of Michael D. LiPuma _____
- 94. Law Offices of Arline Jolles Lotman _____
- 95. Leventhal Sutton & Gornstein _____
- 96. Littler Mendelson P.C. _____
- 97. Malone LLC _____
- 98. Margolis Edelstein _____
- 99. Markowitz & Richman _____
- 100. Marshall, Dennehey, Warner, Coleman & Goggin _____
- 101. Martin LLC _____
- 102. Maschmeyer Karalis PC _____
- 103. McAndrews Law Offices, P.C. _____
- 104. McCann & Geschke, P.C. _____
- 105. McCarter & English, LLP _____
- 106. McCausland & McCausland LLC _____
- 107. McLaughlin & Lauricella, P.C. _____
- 108. McMonagle, Perri, McHugh & Mischak _____
- 109. McNees Wallace & Nurick LLC _____
- 110. Law Offices of John S. McVeigh, P.C. _____
- 111. Messa & Associates, P.C. _____
- 112. Metzger & Kleiner _____
- 113. Montgomery, McCracken, Walker & Rhoads LLP _____
- 114. Morgan, Lewis & Bockius LLP _____
- 115. Nast Law LLC _____
- 116. Obermayer Rerbmann 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 (formerly Spear & Greenfield) _____
- 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 Offices _____
- 139. Sidkoff, Pincus & Green P.C. _____
- 140. Law Offices of Daniel J. Siegel, LLC _____
- 141. The Smyler Firm _____
- 142. Solomon, Sherman & Gabay _____
- 143. Soloff & Zervanos, P.C. _____
- 144. Spector, Roseman, Kodroff & Willis, P.C. _____
- 145. Stevens & Lee _____
- 146. Stradley Ronon Stevens & Young, LLP _____
- 147. Stuart Leon Law Office _____
- 148. Swartz Campbell LLC _____
- 149. Tactix Real Estate Advisors, LLC _____
- 150. Teeters Harvey Gilboy & Kaier LLP _____
- 151. Law Offices of Thalheimer & Palumbo P.C. _____
- 152. Tucker Law Group _____
- 153. Villari, Brandes & Giannone P.C. _____
- 154. Volpe and Koenig, P.C. _____
- 155. Wapner Newman Wigrizer Brecher & Miller _____
- 156. Weber Gallagher Simpson Stapleton Fires & Newby LLP _____
- 157. Welsh & Recker _____
- 158. The Weinstein Firm, LLC _____
- 159. Weir & Partners LLP _____
- 160. Weiser Law Firm P.C. _____
- 161. Wetzel Gagliardi & Fetter LLC _____
- 162. White and Williams LLP _____
- 163. Willig, Williams & Davidson _____

- 164. Wilson Elser Moskowitz Edelman & Dicker LLP
- 165. Law Office of Rhonda Hill Wilson, P.C.
- 166. Winebrake & Santillo, LLC
- 167. Winston Law Firm, LLC
- 168. Wisler Pearlstine, LLP
- 169. Young Conaway Stargatt & Taylor, LLP
- 170. Zarwin, Baum, DeVito, Kaplan, Schaer & Toddy, P.C.
- 171. 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. Briefly describe the effect of decreases in funding from LSC, IOLTA or other sources.

2. The Bar Foundation is committed to promoting awareness of the mission and works of each of its grantees. To assist us in that effort, please supply 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.

In addition, please provide a few photographs (or other digital artwork) highlighting your mission. 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.