

# Grantmaking Guidelines and Grant Application Packet 2019

## Introduction

The Philadelphia Bar Foundation is dedicated to promoting a Philadelphia community in which everyone has equal access to justice. Through programs, grants, and partnerships, the Philadelphia Bar Foundation removes barriers to justice, engages the community in support of civil legal aid, and builds system-wide capacity in order to strengthen the provision of quality legal services to ensure that all individuals understand their rights to equal justice under law.

The Bar Foundation believes:

- that all people should have equal access to justice and the right to legal representation;
- in a just and fair society; when we work to provide an equitable and inclusive playing field, we make our legal system fairer;
- that it is our responsibility to advocate for equal access to justice wherever possible, to drive change and provide legal services to underserved communities;
- in recognizing, supporting, and celebrating the efforts of partners and collaborators who further these principles; the whole is bigger than the sum of its parts; and
- in amplifying the unique value that the Philadelphia Legal Aid community provides.

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; and 2) Special Projects.

## 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.

## 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 the review and evaluation of the proposal.

Agencies that receive grants 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.

## Grant Application Guidelines

1. Timeline:
  - Grant Applications should be received at the Philadelphia Bar Foundation office by May 31, 2019.
  - Proposals are reviewed June – September 2019.
  - Presentations and/or site visits (as determined by the Grants Committee) will be conducted between June and September 2019.
  - Funding decisions are made in December.
  - Grants are made in December.
  
2. 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.

### 3. 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;
- Has a highly qualified staff.

## Grant Application Checklist

Please submit your Grant Application via email to [jhilburnholmes@philabarfoundation.org](mailto:jhilburnholmes@philabarfoundation.org) no later than **May 31, 2019** -- with the subject line: 2019 PBF Grant Application.

1. Grant Application Cover Page (see attached form).
2. Organization Data Sheet (see attached form).
3. Proposal Narrative - No more than 300 words for each of the four questions 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.
  - 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— Law Firm Donations
7. Attachment B— Request for Additional Information.

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](mailto:jhilburnholmes@philabarfoundation.org).

## Proposal Narrative Information Guidelines

Proposals should address the information requested below, but should not exceed 300 words for each answer.

*\*\*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 2019

Applicant Information:

\_\_\_\_\_  
Legal Name of Organization

\_\_\_\_\_  
Project Name (if different)

\_\_\_\_\_  
Legal Address

\_\_\_\_\_  
Legal Address 2

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Website

Contact Person:

\_\_\_\_\_  
Name/Title

\_\_\_\_\_  
Email

Executive Director:

\_\_\_\_\_  
Name/Title

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

# Pro Bono Clients \_\_\_\_\_ Approx. # Pro Bono Hours \_\_\_\_\_

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 and Fraud						
Disabilities						
Education						
Elder Law						
Employment						
Family Law						
Health						
Housing						
Immigration						
Juvenile Law						
Public Benefits						
Other (please specify):						
<b>Total Cases/Campaigns</b>						

## Attachment A

Please list all donations received from law firms in 2018, including event sponsorships. Include law firm name and dollar amount.



## Attachment B

### Request for Additional Information

The Bar Foundation wants to help communicate the impact continuing cuts in funding have on your work.

If your agency has 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.).

Conversely, if there are new sources of funding that have boosted your resources, please indicate the source, amount and any conditions concerning those funds.