

Interest on Lawyers Trust Accounts (IOLTA) Grants Program
Application Information and Guidelines
Grant Period: June 1, 2008 - May 31, 2009

Submission Deadline

Monday, February 25, 2008 by 5:00 p.m.

The Interest on Lawyers Trust Accounts (IOLTA) Program, supported by lawyers and the banking community, makes the Bar Foundation's IOLTA Grants Program possible. Through IOLTA, client funds which are nominal in amount or to be held for a short period of time and which would not normally generate interest, are placed in special interest-bearing accounts. The interest is forwarded to the New Hampshire Bar Foundation to be used for charitable purposes under guidelines set forth in 1982 by the New Hampshire Supreme Court, Rule 50:

- (1) for the support of civil legal services to the disadvantaged;
- (2) for public education relating to the courts and legal matters;
- (3) for such other programs as may be approved by the Supreme Court.

GRANT GUIDELINES

Grant applicants may apply for IOLTA funding under one or both of the categories below:

- Direct civil legal services to the disadvantaged;
- Public education relating to the courts and legal matters.

A program may only apply once in each category in any given fiscal year.

Eligible Programs

- Nonprofit programs that involve the delivery of civil legal services to the disadvantaged by an attorney or by a qualified person under the supervision of an attorney.
- Nonprofit public education projects about the courts and the law.

Who May Apply?

Nonprofit organizations, programs, or educational institutions incorporated in New Hampshire with tax-exempt status from the Internal Revenue Service.

Funding Principles

Available online: www.nhbarfoundation.org

Exclusions

1. The Bar Foundation will not fund:

- for-profit entities;
- political campaigns;
- religious activities; or
- projects that would jeopardize the Bar Foundation's tax exempt status.

2. The Bar Foundation generally will not make grants to:

- individuals;
- endowment campaigns;
- capital campaigns; or
- to pay down a deficit.

Grant Application Format and Guidelines

- Please use 12 point type, single-spaced on 8½ x 11 white paper.
- Submit original (with signed cover page) and 5 identical copies, including sections I, II, & III.
- Submit 1 copy of section IV, and if applicable, section V.
- Please 3-hole punch and clip/band each copy.
- Clear and concise applications are appreciated. Please include the following:

I. Completed IOLTA Grant Application Cover Sheet (online at www.nhbarfoundation.org)

II. Proposal Narrative – in no more than **5 pages**, please address the following, in order, by heading:

A. Organization/Program History

Mission Statement; brief description of your programs; significant service statistics

B. Community Need – Describe why your program is needed; the resources you use to calculate and track the need; and any pertinent statistics.

C. Program Description – Describe your plan of action in response to the need outlined.

D. Goals and Priorities – Describe your goals and priorities for the grant period and beyond.

E. Evaluation Plan – Describe the specific outcomes you anticipate and the tools you use to measure your progress.

F. Collaborating and Cooperating Partners – List any organizations/firms/individuals with which your organization collaborates to further the effectiveness of your services.

G. Partial Funding – If only partial funding is awarded, a) how will you meet expenses to complete the project as described, and b) what activities in your ‘plan of action’ will not be undertaken if only partial funding is available?

Please Note: Attorney’s Fees - Programs proposing to make payment of fees to individual lawyers for representation of disadvantaged clients must use rates for reimbursement consistent with the NH Supreme Court-Approved Indigent Defense-Assigned Counsel hourly rates/NH Bar Association Reduced Fee Referral Service. Such guidelines and procedures **must** be in place before FY 2009 IOLTA funding in this category is actually remitted to the grantee. Please call if you have any questions.

III. Attachments

1. Direct Support for IOLTA among Program Policy-Makers

Provide a list of all **lawyer** members of the organization's board of directors or advisory board, and indicate whether or not each lawyer member participates in the IOLTA Program.

2. Financial Need/Resources

Describe how your organization seeks other funding and community support. Provide a list of all current funding sources and the amount received in the current fiscal year from each source. Indicate if you are making this same application to other sources and, if so, provide details about the funding source(s) being pursued and the amount(s) being requested.

Please Notify the Bar Foundation if you receive any grants for the same or similar service(s) or project(s) while this IOLTA application is under consideration (through May 2).

3. Budget

Include an itemized budget for the grant period detailing use of the requested funds.

IV. Support Materials Required – ONE COPY ONLY

- Financial statement for most recently completed fiscal year
- Organization's most recent IRS 990 form
- Organization's current budget
- Resume of executive director and/or project director
- List of current board of directors with addresses and occupations
- Letter of Good Standing received upon registering with the Attorney General's Office
- Organization's most recent tax exempt status letter from the IRS

V. Organizations with Budgets Greater than \$500,000

Please include the following documents:

- Most recent audited financial statement
- Organization's Strategic Plan covering the grant period. (If applicant does not have a Strategic Plan, then establishing one should be a part of the application. Please include an outline on how it will be accomplished over the next 24 months.)

For Current IOLTA Grantees

1. Current IOLTA grantees will receive consideration for FY 2009 funding only if all required reports for prior grant funding have been submitted to the Bar Foundation.

2. Acknowledgement of Funding: Please include examples of press releases, published articles, print materials, web pages, etc. in which the recipient has acknowledged funding by the NH Bar Foundation.

ETHICAL CONSIDERATIONS

All attorneys whose representation of individual clients or client groups is made possible in full or in part by the New Hampshire IOLTA Program are expected to adhere fully to the provisions of the New Hampshire Rules of Professional Conduct and to be guided by the American Bar Association Standards for the Providers of Civil Legal Services to the Poor.

FURTHER INFORMATION

For further information about the IOLTA program or any aspect of the above-described grant application guidelines and format, contact Susan Noon, program and communications director (603)715-3253, at the New Hampshire Bar Foundation, 2 Pillsbury Street, Suite 300, Concord, New Hampshire, 03301.

Grant Deadline

Must be received by 5:00 p.m., Monday, February 25, 2008