

## **RHODE ISLAND BAR FOUNDATION**

### **IOLTA GRANT CRITERIA**

Twelve Month Grant Cycle (January 1, 2019 – December 31, 2019)

The Foundation will not make grants to:

- individual persons;
  - religious organizations;
  - political campaigns;
  - organizations that are designed primarily for lobbying;
  - support travel, either by groups or individuals;
  - endowment campaigns;
  - scholarships and fellowship programs;
  - continuing legal education programs for lawyers;
  - law enforcement or correctional organizations;
  - other organizations which do not meet the specific criteria listed below.
- The Foundation does not intend to use its limited resources to replace existing funding.
  - A primary function of an agency seeking a grant must be consistent with the purposes listed below:
    1. Providing legal services to the poor of Rhode Island;
    2. Improving the delivery of legal services;
    3. Promoting knowledge and awareness of the law;
    4. Improving the administration of justice.

- Grant requests must be consistent with the tax-exempt public purposes prescribed by the Foundation and with applicable Internal Revenue Code regulations and rulings.
- The grant funding cycle will normally be a 12 month period. Recipients must reapply each year if additional funding is desired.
- All grant recipients are expected to propose criteria by which their projects will be reviewed at least annually and to assist the Foundation in conducting periodic evaluations.
- Significant weight will be given to a history, or a clear ability of an applicant to provide a successful program.
- Consideration will be given to the proportion of the public proposed to be served within a geographic area and the breadth of services proposed to be offered.
- Applicants will demonstrate fiscal responsibility, program stability, and an ability to ensure the effective and efficient delivery of quality services.
- Pro bono publico programs will be encouraged.
- Priority will be given to applications requesting funds for the direct representation of clients.
- Funds will not be awarded to provide legal assistance with respect to any fee-generating case.
- All grantees will be subject to random audits and spot checks during the course of each year and all unexpended funds must be returned to the Foundation.

## GRANT PROPOSAL FORMAT

Each grant application shall be accompanied by a written proposal, which shall set forth:

- A. The objective(s) of the project for which funds are requested;
- B. The amount of funds requested and when expenses are anticipated;
- C. The methods by which the objective(s) are to be accomplished;
- D. The period of time expected to complete the project;
- E. Providers of legal assistance should provide a statistical summary of caseload data for the most recent year. Describe training and support systems, supervision of legal work systems, staff evaluation systems and client grievance procedure. The Foundation will require appropriate income and asset requirements to determine legal service eligibility for those services provided by IOLTA Grant Funds.
- F. An estimated budget of the funds and how they will be expended; (form attached)
- G. Facts showing the applicant's Federal tax exempt privileges;
- H. Whether support has been or is being requested of other Foundations;
- I. The amount and source of funds already available;
- J. Such additional information as the applicant believes desirable;
- K. If such grant results in the distribution of a publication, will due credit be given to the Foundation as a source of its funds?

**THE RHODE ISLAND BAR FOUNDATION**  
**GRANT APPLICATION FORM**

NAME OF ORGANIZATION/APPLICANT \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

CHIEF EXECUTIVE OFFICER \_\_\_\_\_

PROJECT NAME \_\_\_\_\_

AMOUNT REQUESTED \_\_\_\_\_ FREQUENCY OF PAYMENTS \_\_\_\_\_

PAYABLE TO START \_\_\_\_\_

PAYABLE TO: \_\_\_\_\_ ATTENTION OF: \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TAX EXEMPT ELIGIBILITY \_\_\_\_\_

(Attached copy of tax exemption letters)

INFORMATION CONTACT \_\_\_\_\_

TITLE \_\_\_\_\_ TELEPHONE # (\_\_\_\_) \_\_\_\_\_

INFORMATION CONTACT EMAIL ADDRESS: \_\_\_\_\_

Approval of any grant application will include a provision that the grantee provide the Rhode Island Bar Foundation with progress reports concerning the project/organization for which the grant is made.

Please submit (1) Grant Application Form; (2) written narrative proposal which responds substantially to the questions in the Grant Proposal Format (enclosed), and your most recent audited financial statements. All proposals should be on 8 ½ x 11 paper and should be submitted by email or in 10 copies to the Rhode Island Bar Foundation, 41 Sharpe Drive, Cranston, RI 02920, by the appropriate application deadline which is Wednesday, October 3, 2018.

- NOTE: All grantees will be subject to random audits and spot checks during the course of each year and all unexpended funds must be returned to the Foundation.

SUBMITTED BY \_\_\_\_\_

TITLE \_\_\_\_\_ DATE \_\_\_\_\_

**RHODE ISLAND BAR FOUNDATION  
SAMPLE BUDGET FORM**

*If for any reason this budget form does not present your financial situation clearly,  
please attach a detailed alternate budget sheet.*

**NAME OF PROGRAM/AGENCY** \_\_\_\_\_

FISCAL YEAR \_\_\_\_\_ to \_\_\_\_\_

1. INCOME: Please attach a sheet specifying all sources and amounts of income for the fiscal year.

2. EXPENDITURES:

<b>BUDGET</b>	<b>IOLTA FUNDS REQUESTED</b>	<b>TOTAL BUDGET (Excluding IOLTA funds requested)</b>
<hr/>		
<b>PERSONNEL</b>		
(list specific positions)		
SALARY		
BENEFITS & TAXES		
<hr/>		
<b>TOTAL PERSONNEL COSTS</b>		
<hr/>		
<b>NON-PERSONNEL:</b>		
SUPPLIES		
EQUIPMENT RENTAL		
UTILITIES (Specify)		
SPACE		
OTHER (Specify)		
<hr/>		
<b>TOTAL NON-PERSONNEL COSTS</b>		
<hr/>		
<b>TOTAL PERSONNEL &amp; NON PERSONNEL</b>		
<hr/>		