**Application for PA IOLTA Board Specialized Legal Services (“Zone”) Grant 2017-2018**

**Part Two: Narrative (MS Word) Portion**

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| --- | --- |
| **Grant Applicant Organization Name:** |  |
| **Title of Project for which Grant is Requested:** |  |

**NOTE TO RECIPIENT**: *Please enter further information about your organization and the grant request in PART ONE: Data (Excel) Portion of this report.*

**For Further Information Contact:**

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**Contents**

|  |  |
| --- | --- |
| **Part One: Data Portion (MS Excel)** | **Tab in Excel Workbook** |
|  |  |  |
|  | **Instructions for Use of The Excel Workbook** | *Instructions* |
|  |  |
| **Applicant Organization Information** |  |
|  | Applicant Information | *A, B* |
|  | Qualifying Questions | *C* |
|  | Volunteer and In-Kind Resources | *D* |
|  | Applicant Budget and Revenues - Summary | *E* |
|  | Applicant Staffing and Cases | *F* |
|  |   |  |
| **Proposal** |  |
|  | Proposal Overview | *G* |
|  | Proposal Staffing | *H* |
|  | Proposal Budget and Revenues | *I* |
|  | Expense Categories | *J* |
|  | Anticipated Outcomes | *K* |
|  | Outcome Types | *L* |
|  |  |  |
| **Part Two: Narrative Portion (MS Word)**  | **Page in Word Document** |
| **Applicant Organization Information** |  |
|  | Mission and Services | *1.0* |
|  | Organizational Standard ONE | *2.0* |
|  | Organizational Standard TWO | *3.0* |
|  | Organizational Standard THREE | *4.0* |
|  | Organizational Standard FOUR | *6-0* |
|  |  |  |
| **Proposal Information** |  |
|  | Executive Summary | *8.0* |
|  | Proposal Impact | *9.0* |
|  | Court-Appointed Cases | *10.0* |
|  | Attorney's Fees | *11.0* |
|  | Priorities | *12.0* |
|  | Attachments (List) | *14.0* |

**A. Applicant’s Mission and Services**

**1. What is your organization’s mission statement?**

*Please type or copy-and-paste your response in the text box below – 75 words maximum. (Note that the text box will expand to fit the amount of text you have inserted.)*

**2. Briefly describe legal services efforts in the last three years that you believe best exemplify the work of your program.**

*Type or copy-and-paste your response in the text box below – 400 words maximum.*

**B. Performance Standards**

* *The following questions pertain to the organization as a whole, not just the proposed grant activities.*
* *There are many ways, ranging from very simple and informal, to quite extensive, that an organization can effectively address each standard within the limits of its available resources and funding. For questions that do not apply to your organization, please indicate so.*

**Organizational Standard ONE:**

***IOLTA grant recipients are effective at identifying legal needs and targeting resources.***

**A strong proposal will demonstrate that:**

(1) The applicant carried out a comprehensive needs assessment through surveys, questionnaires, focus groups, meetings, analysis of data and other information, or other appropriate methods to determine areas of critical client civil legal needs. As part of the assessment, the applicant determined that other providers and resources in the service area are not adequately addressing the need;

(2) The applicant identified specific strategies that allocate appropriate program activities to achieve success in meeting the identified client needs in a cost-effective manner;

(3) The applicant identifies an evaluation plan such that the program's activities can be adjusted to respond to changing conditions and actual outcomes achieved.

**1. Assessing legal needs**

*Please indicate when the last legal needs assessment was conducted. Describe the process that was used, and indicate the external parties (for example, low-income residents, community partner agency staff, pro bono lawyers, etc.) who were provided opportunities to have input. When will the next needs assessment occur? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**2. Identifying strategies for allocating program activities**

*Once case/service priorities are identified, how do you deploy program activities to target those priorities (in a cost effective manner)? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**3. Adjusting to Emerging and Changing Client Needs**

*In between formal needs assessments, how does the organization timely evaluate and adjust to emerging and changing client legal needs? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**Organizational Standard TWO:**

***IOLTA grant recipients are effective in engaging and serving the low-income population.***

**A strong proposal will demonstrate that the program:**

(1) provides services in a way that affirms and reinforces the dignity of clients and is sensitive to clients' individual circumstances, languages and cultures;

(2) is engaged with the population eligible for its services through effective outreach, involvement by clients on its board and other program activities;

(3) is accessible to and facilitates effective utilization of its services by its target client population(s) by identifying and removing barriers to its services.

**1. Affirming and reinforcing the dignity of clients**

*How does the organization ensure services are provided with dignity and sensitivity toward clients? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**2. Engaging the eligible population**

*How does the organization engage low-income people in the work of the program (outside the scope of a client's participation in his or her individual case)? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**3. Assuring accessibility to and utilization by the target population**

*How does the organization assure its services are accessible to its targeted clients? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**Organizational Performance Standard THREE:**

***IOLTA grant recipients are effective in delivering high-quality legal services and other program activities.***

**A strong proposal will demonstrate that the program:**

(1) Provides effective legal representation, and has systems in place to assure appropriate supervision, training and development of its staff, applies feedback obtained from stakeholders and clients to evaluate and improve program effectiveness and quality;

(2) Integrates private attorneys and others to supplement and increase the effectiveness of its representation and other services

(3) Provides other services, such as assistance with self-help strategies, legal information through its website or other channels, community legal education, and other activities;

(4) Engages and is active with other important stakeholders such as the judiciary, government agencies, social services agencies, and other entities working on behalf of or serving its targeted client population.

**1. Providing effective, high quality services**

*How does the organization ensure legal representation and other services are effective and of high quality? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**2. Integrating private attorneys and other volunteers in service delivery**

*How does the organization engage private attorneys and other volunteers to expand client services or otherwise assist the program? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**Organizational Performance Standard THREE, *continued***

**3. Providing other services**

*How does the organization achieve its goals and objectives through the provision of services other than legal representation to its client population by staff or pro bono attorneys – for example, telephone intake and advice, pro se assistance, community legal education, etc.? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**4. Engaging other stakeholders**

*How does the organization collaborate and influence other stakeholders involved with its client population? Please describe the nature of the collaboration and how it has benefited your client population. (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**Organizational Performance Standard FOUR:**

***IOLTA grant recipients have effective governance, leadership and administration.***

**A strong proposal will demonstrate that the program:**

(1) Has an effective board that is appropriately diverse and representative of the geographical areas and low-income populations served by the program, and is involved with the program's oversight through major policy decisions;

(2) Has effective leadership that provides opportunities for the development of a diverse group of leaders;

(3) Emphasizes innovation and creativity in its achievement of goals and objectives;

(4) Demonstrates effective administration through appropriate management/supervisory systems, sound financial and human resources policies, stable staffing, resource development and a coherent and comprehensive service delivery system within its available program resources.

**1. Engaging the program board**

*How does the organization demonstrate appropriate board oversight and engagement in achieving its mission? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**2. Ensuring effective leadership**

*How does the program provide opportunities for staff to develop and exercise leadership skills? Be sure to describe the opportunities offered to senior and junior staff. (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**Organizational Performance Standard FOUR, continued**

**3. Emphasizing innovation and creativity**

*How does the organization foster creativity and innovation? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**4. Demonstrating effective administration**

*How does the organization demonstrate effective program administration? (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**E. Proposal Information**

**1. Executive Summary**

**a. Legal Needs to Be Addressed**

*Summarize the legal need(s) to be addressed and identify the targeted client population. (NOTE: You will submit quantifiable anticipated outcomes in Part I (Excel portion) of the application.) (Type or copy-and-paste your response in the text box below – total of 500 words maximum.)*

**b. Service Delivery Plan**

*Summarize the service delivery plan to address the legal need(s) described above. (Type or copy-and-paste your response in the text box below – total of 500 words maximum.)*

**2. Proposal Impact**

**a. Type of Impact**

*Which of the following do you believe contributes most to the impact of the proposal? Select one.*

|  |  |
| --- | --- |
| 1. Cases and Their Impact |  |
| 2. Volume of activities and/or cases |  |
| 3. Geographic reach to your client base |  |
| 4. Recognition by others |  |
| 5. Replicable Pilot Project |  |
| 6. Novel Approach |  |

**b. Impact Narrative**

*In a brief narrative, please support the selection you made above. (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**3. Court-Appointed Cases**

|  |  |
| --- | --- |
| *a. Are any of the clients you propose to serve with this project statutorily, constitutionally, or otherwise entitled to counsel on the matter for which you will be providing services?* |  |
|  | **Yes** |  | **No** |

*b. If your response to item “a” is yes, please provide a description of how court-appointed cases are assigned to your organization. Please also include the percentage of the proposal's caseload you anticipate being composed of court-appointed cases. (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**4. Attorney’s Fees**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| *a. Do you anticipate the proposed activity generating attorney’s fees?* |  | **Yes** |  | **No** |

*b. If your response to item “a” is yes, please provide a description of how fee-generating cases are accepted by your organization. Please also include the percentage of the proposal's caseload you anticipate being composed of fee-generating cases. (Type or copy-and-paste your response in the text box below – total of 200 words maximum.)*

**5. Priorities**

*The proposal must address at least one of the priorities. But additional consideration will be given to applicants and/or projects which address more than one. Indicate whether your proposal addresses each priority. If yes, explain how your proposal (not the organization as a whole) addresses that priority.*

**Priority One: Expands access to hard-to-reach groups**

*A proposal meets this priority if (1) the proposed activities make it easier for clients to obtain legal services (such as through holding community legal clinics in strategic locations); AND, (2) the target population is difficult to reach (e.g., the client population has language/cultural barriers or there is lack of public transportation in the targeted service area).*

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| --- | --- | --- | --- | --- |
| ***My proposal addresses Priority One:*** |  | **Yes** |  | **No** |

**Description:** *If yes, please explain below how your proposal addresses this priority. (Type or copy-and-paste your response in the text box below – total of 400 words maximum.)*

**Priority Two: Serves especially vulnerable population segments**

*A proposal meets this priority if the proposed activities serve a targeted population with special circumstances that make it especially vulnerable (for example: children, disabled individuals, seniors, etc.).*

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| --- | --- | --- | --- | --- |
| ***My proposal addresses Priority Two:*** |  | **Yes** |  | **No** |

**Description:** *If yes, please explain below how your proposal addresses this priority. (Type or copy-and-paste your response in the text box below – total of 400 words maximum.)*

**Priority Three: Addresses well-documented, high-priority legal needs NOT being adequately met by other providers**

*A proposal meets this priority if the legal need of low income persons is of high importance and is unmet in the service area.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***My proposal addresses Priority Three:*** |  | **Yes** |  | **No** |

**Description:** *If yes, please explain below how your proposal addresses this priority. (Type or copy-and-paste your response in the text box below – total of 400 words maximum.)*

**Priority Four: Applies creative and innovative methods/approaches that could significantly enhance access, increase efficiency and/or improve service quality and could be replicable or expandable**

*A proposal meets this priority if the methods employed are groundbreaking approaches that reduce program costs, improve service delivery, could serve as a model to other service providers, and/or make it easier for low-income people to obtain services.*

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| --- | --- | --- | --- | --- |
| ***My proposal addresses Priority Four:*** |  | **Yes** |  | **No** |

**Description:** *If yes, please explain below how your proposal addresses this priority. (Type or copy-and-paste your response in the text box below – total of 400 words maximum.)*

**Priority Five: Leverages our investment by attracting non-IOLTA funds or other resources**

*A proposal meets this priority if other resources will be involved as a result of the IOLTA grant. Other resources could be additional funding or in-kind assistance in partnership with another entity such as a law school or the local bar.*

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| ***My proposal addresses Priority Five:*** |  | **Yes** |  | **No** |

**Description:** *If yes, please explain below how your proposal addresses this priority. (Type or copy-and-paste your response in the text box below – total of 400 words maximum.)*

**Priority Six: Addresses new and emerging issues**

*A proposal meets this priority if the proposed activities address new and emerging legal issues, as opposed to long-standing legal issues.*

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| --- | --- | --- | --- | --- |
| ***My proposal addresses Priority Six:*** |  | **Yes** |  | **No** |

**Description:** *If yes, please explain below how your proposal addresses this priority. (Type or copy-and-paste your response in the text box below – total of 400 words maximum.)*

**Priority Seven: Results in systemic improvements in the lives of low-income people**

*A proposal meets this priority if the proposed activities have broad or systemic implications which may have a significant impact on the low-income community at-large.*

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| --- | --- | --- | --- | --- |
| ***My proposal addresses Priority Seven:*** |  | **Yes** |  | **No** |

**Description:** *If yes, please explain below how your proposal addresses this priority. (Type or copy-and-paste your response in the text box below – total of 400 words maximum.)*

**6. Attachments**

***The following attachments are required*** *to complete your organization’s application. You will be contacted by the PA IOLTA Board with further instructions on how to submit them. Please be prepared to submit the following:*

1. Signed Assurances Page
2. Case Acceptance and Client Eligibility Guidelines
3. Audited financial statements - Most recently completed fiscal year
4. Audited Financial Statements - Two years ago
5. Copy of cover page from your organization's professional liability and malpractice coverage
6. IRS 501 (c)(3) determination letter
7. Form 990 - Most recently completed fiscal year
8. Form 990 - Two years ago
9. Copy of the corporation's articles of incorporation
10. Office Locations
11. Board Member list