



SUPREME COURT OF PENNSYLVANIA  
**PENNSYLVANIA INTEREST ON  
LAWYERS TRUST ACCOUNT BOARD**

To: Potential Specialized Legal Services (Zone) Grant Applicant  
From: Jim Swoyer, Grants Manager  
Date: November 13, 2017  
Subject: Initiation of 2018-2019 IOLTA Specialized Legal Services (Zone) Grant Application

**Grant Application Forms**

Organizations interested in applying for a Specialized Legal Services (“Zone”) Grant should visit <https://www.paiolta.org/grants/eligibility-applications/#specialized-legal-services> and follow these two steps:

1. Download: *2018-2019 IOLTA Specialized Legal Services (Zone) Grant Application: Data*  
*2018-2019 IOLTA Specialized Legal Services (Zone) Grant Application: Narrative*
2. Submit the completed forms via email to [James.Swoyer@pacourts.us](mailto:James.Swoyer@pacourts.us) by Friday, December 15<sup>th</sup>, 2017. Please attach both forms to a single email. If you are a new applicant this year, please see the relevant selection below.

Please read each question carefully as some have changed slightly from last year. Please do not assume that last year’s answer sufficiently addresses this year’s question. We will not offer applicants a second chance to improve their grant application. Please be sure you are 100% satisfied with your application before you submit it. The IOLTA Board anticipates making its grant recommendations to the Supreme Court in March 2018, with the announcement of the awards not expected until June 2018.

Please do not hesitate to contact me if you have any questions about the application process. I can be reached at 717-238-2001, extension 7002, or at the email address above.

**Grant applications for 2018-2019 must be submitted by Friday, December 15th, 2017.** Applications may be submitted after the close of business, but the date and time stamp on the email must be before Saturday, December 16th.

**Application Attachments**

The IOLTA Board will be using Dropbox to manage submission of the attachments that are required to complete an application. The week after the application period closes, the person designated as the primary contact on the application will receive an email with a “Go to folder” link. Clicking on that link will take you to the folder in which you should upload the attachments. You will need to create a (free) account to do so. You may find the setup easier if you create the account prior to clicking the link. You are only required to complete this process once regardless of whether you submit multiple applications. The URL for Dropbox is <https://www.dropbox.com/>.

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Administering Pennsylvania’s Interest On Lawyers Trust Account (IOLTA) Program

## **Financial Statements Review**

IOLTA staff will continue to compile prior years' audited revenue, expenditures and net assets information from the audit reports that were due on 1/13/17, 4/17/17, or 10/13/17 (FYE 9/30/2016, FYE 12/31/2016, and FYE 6/30/2017 respectively). If your organization's total audited unrestricted net assets for the most recently completed fiscal year represent less than 3 months or more than 12 months of the organization's total audited expenditures, you will be contacted by IOLTA staff to provide an explanation. Your response will become an official attachment to your grant application.

If your final audit is not available before the application deadline, submit a draft audit with the application. However, the application will not be considered for funding until a final audit has been provided to the Board. If we do not receive your final audit by January 15, 2018, your application may not be considered for funding. Please keep us informed as to the date we should expect to receive the final audit.

## **Reminders for Projecting Case Outcomes**

When quantifying Cases on the *Proposal Outcomes* tab, limit the number to those anticipated to be CLOSED in the grant year.

When selecting an Outcome Type on the *Proposal Outcomes* tab, please pay close attention to the definition of each Outcome Type and be sure that the anticipated outcomes you submit match IOLTA definitions. **If you are an agency that uses pro bono attorneys to provide legal services, select "Closed Cases from Referrals to Pro Bono Attorney" as the Outcome Type to track that activity. Your projections should be based on the number of cases your pro bono attorneys will close in the grant year.**

## **New Applicants**

Applicants must establish eligibility for an IOLTA grant before the proposal will be considered for funding. Applicants do this by satisfying the conditions set forth in the Applicant Qualifying Questions and demonstrating that they meet the Organizational Performance Standards. Please see "Tab C. *Applicant Qualifying Questions*" of the *2018-2019 IOLTA Specialized Legal Services (Zone) Grant Application: Data* for more information. Before proceeding to the full application, new applicants are strongly encouraged to contact Jim Swoyer at [James.Swoyer@pacourts.us](mailto:James.Swoyer@pacourts.us) or 717-238-2001, x7002 to be conditionally approved as meeting the Applicant Qualifying Questions. This will help prevent ineligible organizations from investing resources in completing the full application.

## **Organizations Submitting Multiple Applications**

Organizations may submit no more than two applications per annual grant cycle. However, the Board will consider more than two applications from an organization if those additional proposals are targeted to provide services in one or more counties in the Northeast or Northwest geographic zones. Please contact Jim Swoyer if you have questions about the geographic boundaries of the funding zones.

### **Right to Counsel Representation**

The IOLTA Board, at its September 12, 2017 meeting, established a policy that IOLTA grants will no longer support representation in cases where there is a statutory or constitutional right to counsel. However, legal services organizations providing right to counsel representation may apply for IOLTA funding for support of other eligible legal assistance provided by the organization.

### **Funding Projections for 2018-2019**

The IOLTA Board projects that the amount of available grant funds for zone grants will be 8% greater in 2018-2019 as compared to the 2017-2018 awards. Please keep in mind that funding projections are subject to change based upon the actual receipt of Access to Justice Act revenue throughout the course of the current year.

cc: Stephanie Libhart, Executive Director, PA IOLTA