



# 2013 Cover Sheet

(OBFGrt-Forms2013-Part2of2.pdf)

## Applicant Information

Organization: \_\_\_\_\_

Program/Project: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Executive Director: \_\_\_\_\_ Program Dir/Mgr: \_\_\_\_\_

Application Contact & E-Mail: \_\_\_\_\_

## Project Information

Category or categories for which you request OBF grant funds:

Legal services to the disadvantaged       Other \_\_\_\_\_

Law related education      (define) \_\_\_\_\_

Administration of justice

**Total Request Amount:**      \$ \_\_\_\_\_

Funds Requested for:       *Specific Project*       *General Support*       *Other:* \_\_\_\_\_

Tax ID#: \_\_\_\_\_ (required)

Previous OBF Grant Funds:	Year of Prior Grant Awards	Grant Amount
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Your Geographic Area Served: \_\_\_\_\_

Brief summary of grant request *(the main description of your request should be contained within the application body following this cover sheet):*

## Applicant Agreement

\_\_\_\_\_ (applicant) agrees to carry out the activities described in this application, if granted funds as requested herein by the Oklahoma Bar Foundation, and shall report to the Oklahoma Bar Foundation on progress and results from using all such grant funds.

Date: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

*For OBF Use - Do no write below this line*

Application # \_\_\_\_\_ Date Received \_\_\_\_\_ Status \_\_\_\_\_ Amount \_\_\_\_\_

**Please print and read the [OBFGrt-Instruct2013-Part1of2.pdf](#) file before completing the grant application process. Thank you.**



## Financial Information and Budget Sheet

Your Program: \_\_\_\_\_

	2012 Actual <i>(or last year)</i>	2013 Budgeted <i>(or current year)</i>	2014 Projected Budget <i>(or next year – request year)</i>
<b>Beginning Fund Balance</b>	\$ _____	\$ _____	\$ _____
<b>REVENUE</b> <i>(disclose all revenue)</i>	XXXXXX	XXXXXX	XXXXXX
OBF Grant Award here:	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<b>Total Revenue</b>	\$ _____	\$ _____	\$ _____
In-Kind Donations	_____	_____	_____
In-Kind Services	_____	_____	_____
<b>TOTAL REVENUE (Including In-Kind)</b>	\$ _____	\$ _____	\$ _____
<b>EXPENSES</b>			
Salaries <i>(itemized list required)</i>	_____	_____	_____
Benefits/Payroll Taxes	_____	_____	_____
Office Space	_____	_____	_____
Telephone	_____	_____	_____
Supplies	_____	_____	_____
Postage	_____	_____	_____
Equipment:*	_____	_____	_____
Rent/Lease	_____	_____	_____
Maintenance/Repair	_____	_____	_____
Depreciation Expense**	_____	_____	_____
Printing and Photocopying	_____	_____	_____
Travel & Education	_____	_____	_____
Auditing	_____	_____	_____
Insurance	_____	_____	_____
Software/Internet Subscriptions:	_____	_____	_____
Other Program/Project Expenses:	XXXXXX	XXXXXX	XXXXXX
_____	_____	_____	_____
_____	_____	_____	_____
<b>Total Expenses</b>	\$ _____	\$ _____	\$ _____
In-Kind Donations	_____	_____	_____
In-Kind Services	_____	_____	_____
<b>TOTAL EXPENSES (Including In-Kind)</b>	\$ _____	\$ _____	\$ _____
<b>GAIN/LOSS</b>	\$ _____	\$ _____	\$ _____
<b>Ending Fund Balance</b>	\$ _____	\$ _____	\$ _____
<b>Capital Purchases To Be Made***</b>			\$ _____

\* Equipment Expense does not include capital purchases, see bottom line.

\*\* Depreciation Expense should reflect the annual depreciation of equipment owned by the organization.

\*\*\* If you plan to use OBF funds for Capital Purchases, please describe & explain reason for purchase on separate sheet; attach 3 quotes.


**▶ ATTACH YOUR ORGANIZATION'S FINANCIAL STATEMENTS AND YOUR IRS FORM 990 FOR THE TWO MOST RECENT YEARS.**

## OBF Grant Application Final Checklist

Prior to submitting your application, please review all submission instructions to ensure your application is complete according to requirements; instructions are contained in a separate file – **OBFGrt-Instruct2013-Part1of2.pdf** . The following checklist is included for your convenience and you need not return the checklist with your application submission.

### My OBF Application Packet:

- Because the organization of the application has changed, we carefully review “2013 Grant Application Instructions and Requirements” before completing the OBF grant application packet.
- Includes 1 original and 14 copies – printed on unbound 8 1/2" x 11" paper, all legal-size attachments are reduced to 8 1/2" X 11" size, with only one staple in upper left corner of each;
- Is being submitted to the Oklahoma Bar Foundation not later than 5:00 pm CST on Tuesday, July 8, 2013 – the application is either being mailed, delivered in person or via messenger. (applicants are strongly encouraged to submit applications packets early);
- Includes a complete, **signed** 2013 Cover Sheet using the form on first page of the application packet (nothing should be placed before the 2013 Cover Sheet);
- Includes a complete program overview describing the funding request and all other pertinent information as required in the “2013 Grant Application Instructions and Requirements”;
- Includes a Budget Narrative as well as the Financial Information and Budget Sheet (figures are in balance and the funding request amount matches the total shown on the 2013 Cover Sheet);
- Includes 2 copies of our audited financial reports and organization financial statements for the two most recent years;
- Includes 2 copies the last two year’s IRS Form 990’s or other tax report forms;
- Includes an itemized listing of staffing positions and salaries; job descriptions are included for all positions that are to be funded totally or in part by any portion of the OBF request;
- Includes important information relating to possible grant funding in a “lesser amount” along with priorities;
- Includes all attachments and supplemental documents – all on 8 ½" X 11" sized sheets.

 **Incomplete grant applications will be returned for timely completion or clarification.**

### Attached for Your Information only are:

- Sample copy of the “OBF Grant Quarterly Report Form”
- Examples of the “Narrative Story On Your Program” – 2 stories per grant period.

## Grant Agreement

A grant agreement, to be provided by the Oklahoma Bar Foundation upon notification of the grant funding award, must be executed by the grantee and returned to the OBF office before grant funding will commence.

## Application Packets

Grant application packets, and supporting materials, become the property of the Oklahoma Bar Foundation and will not be returned. OBF has the right to use any or all information provided in the application submission, whether or not the proposal is accepted.

**For further information, please contact the OBF at (405) 416-7070 or [foundation@okbar.org](mailto:foundation@okbar.org)**



# Oklahoma Bar Foundation Grant Quarterly Report Form

**TO:** Nancy Norsworthy, Executive Director  
Oklahoma Bar Foundation  
P O Box 53036  
Oklahoma City OK 73152-3036

Phone: (405) 416-7070 or (800) 522-8065, Ext 7070  
E-mail: nancyn@okbar.org

**FROM:** Your Contact  
Name: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Program/project funded: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Contact Phone: \_\_\_\_\_  
Contact E-mail Address: \_\_\_\_\_  
Preparation Date: \_\_\_\_\_  
Report Period Covered: \_\_\_\_\_  
OBF Grant Period: 2013 OBF Grant Period Payable for Calendar Year 2014  
Full Amount Granted: \_\_\_\_\_

**BRIEF PROGRAM DEFINITION:**

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**INTRODUCTORY STATEMENT:**

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<b>RUNNING TOTAL ALL GRANT EXPENDITURES TO DATE:</b>	<i>(running total grant period to date)</i>
<i>Expense Category Description</i>	<i>Expended Amount <b>this Report Period</b></i>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
<b>TOTAL THIS REPORT PERIOD ONLY =</b>	_____



**QUARTERLY HIGHLIGHTS:**

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**REPORT ALL APPLICABLE STATISTICAL INFORMATION:**

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**PROBLEMS ENCOUNTERED:**

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**YOUR PROGRAM GOALS AND PROGRESS/SUCCESSSES (your outcomes):**

*As defined in your Grant Application required under Section 6 of the Grant Application Instructions.*

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**PRO BONO EFFORT HIGHLIGHTS (volunteer efforts):**

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**ADDITIONAL INFORMATION, INCLUDING PUBLIC RECOGNITION OF THE OBF:**



**Annual Grant Narrative Requirement for each OBF Grant Award to be submitted by all organizations receiving OBF funding – Two (2) Stories:**

Provide at least two (2) brief narrative stories about your program and/or project's successes for OBF publication purposes. These should be client, volunteer, student or other participant success stories that have not been published elsewhere. OBF is interested in personal testimonials and stories that will dramatize and give heart to the effect of your program rather than normal facts, figures and statistics. Two examples follow below.

## **Vivian – Legal Aid Services**

### *Example No. 1*

Vivian came to the Legal Aid office from a rural southern county of Oklahoma seeking help with Social Security survivor benefits for her young child. The mother and father had never been married, and unfortunately the father was murdered before paternity could be established. The Legal Aid lawyer looked down at the sleeping child and the young mother and knew he must help them. Suit was filed and the lawyer obtained a court order for paternity testing to be performed on a sample of the father's blood that was being held by the State Medical Examiner's office. The lawyer also knew of a different social service agency that would pay for testing. The test confirmed the child's paternity and the Social Security Administration sent a check for over \$16,000 in back benefits the child should have been receiving. Vivian had been a college student but was now staying in a shelter. Her old car had broken down the week before coming to Legal Aid, and she lacked funds to have it repaired. Vivian wasn't sure what to do until visiting Legal Aid of Oklahoma. The money has made it possible not only for her to have the car repaired, but she has been able to rent a home for herself and her young son. Vivian has also been able to return to school with a totally different outlook on life. Someday, Vivian hopes to be able to return the favor to someone else in need.

**Legal Aid Providers** were awarded a total of (dollars) this year, matching the amount given them for the past two years. But OBF was not able to fund 100% of their request this year due to decreased IOLTA revenue.

It is estimated that one in six Oklahomans live in poverty, and one in four Oklahoma children live in poverty. Oklahoma is ranked as the 8th poorest state in the nation. Of the 3.2 million people living in Oklahoma, over 685,000 people with incomes below 125% of the poverty level are eligible for assistance from Oklahoma Legal Aid providers. In addition to the work performed by the staff, Legal Aid also relies heavily upon the generous donations of time and expertise by private attorneys involved in providing legal services within their respective service areas.

## **Joey – Legal Volunteers for Children**

### *Example No. 2*

Joey was taken into State custody by police when he was only 10. He hadn't done anything wrong, but had been greatly wronged in his young life by those who should have protected him – his parents. They were divorced when Joey was 5. His father received sole custody of Joey after the divorce court determined his mother had repeatedly inflicted serious physical abuse on him, so serious in fact that the court permanently barred her from even visiting him.

At age 10, his mentally ill father held Joey hostage in a standoff with police; the father threatened to commit suicide while a police officer tried to "talk him down." When the standoff ended, Joey was taken to an emergency shelter and placed in DHS custody. That's where his Tulsa Lawyers for Children (TLC) volunteer lawyer met Joey. Over the next 6 years his lawyer was the only constant in Joey's life as social workers, judges, foster parents and therapists moved in and out of his life. Most kids have a parent, who remembers where they came from, what they looked like at various ages, and how they grew from childhood into pre-teen and teen years -- Joey only had a lawyer to carry those memories of him. His story has a happy ending, though. Joey was adopted at 16 by foster parents who fell in love with him when placed with them as a foster child. His TLC volunteer lawyer was there when the judge signed the adoption papers, giving him a permanent home, a family and a future. She was grateful to have been there since the beginning of Joey's journey through the child welfare system and deeply gratified that her young client might indeed "live happily ever after."

Tulsa Lawyers For Children received an OBF grant to purchase a computer to aid in the administration and recruitment of volunteer lawyers for pro bono representation of children in deprived cases throughout Tulsa County. Funding was also provided to the Oklahoma Lawyers For Children group to aid in establishment of the pro bono program that co-ordinates volunteer lawyers in Oklahoma County, our state's largest county. Tulsa County has the second largest population in Oklahoma.