



# OKLAHOMA BAR FOUNDATION

## 2013 Grant Application Instructions and Requirements

**The organization of the application has changed.** Please carefully review the “2013 OBF Grant Application Instructions and Requirements” before completing your grant application packet. Thank you.



*Part 1 of 2 – see [OBFGrt-Forms2013-Part2of2.pdf](#) for remainder of the application packet.*



## General Information

The Oklahoma Bar Foundation (OBF) was founded in 1946 to accomplish the charitable purposes of lawyers from all across Oklahoma. OBF is a 501(c)(3) nonprofit organization and is the third oldest state bar foundation in the Nation. It serves as the charitable arm of the Oklahoma Bar, and all licensed lawyers in Oklahoma are members of the Foundation. OBF works silently behind the scenes for Oklahoma's children, the poor and our most vulnerable citizens through the generous support of attorneys by charitable donations and participation in OBF programs such as the Fellows, IOLTA and other contributions.

The purposes of OBF grant funding are:

- To provide delivery of civil legal services to the poor and elderly;
- To promote quality education of the law and legal issues;
- To improve and promote the administration of justice and law-related programs for the benefit of the public, as are specifically approved by the Oklahoma Bar Foundation for exclusively public purposes.

Grants totaling \$465,950 were approved during 2012 by the Oklahoma Bar Foundation Board of Trustees to:

- Provide **delivery of civil legal aid services to the poor and elderly throughout Oklahoma** and to improve the administration of justice. Grants totaling \$175,000 were awarded to Legal Aid Services of Oklahoma, Inc. and the Oklahoma Indian Legal Services Low Income Taxpayer Clinic, and \$110,700 was awarded for legal aid and advocacy services for children, the elderly and victims of violence to: Oklahoma Lawyers For Children Inc., Tulsa Lawyers For Children Inc., Center for Children and Families Inc., Community Crisis Center, Inc., Domestic Violence Intervention Services, Inc., Family & Children's Services Inc. Tulsa County Court Program , Family Shelter of Southern Oklahoma, Inc., Marie Detty Youth and Family Services Center, Oklahoma CASA Association for Children Statewide Training Conference, Catholic Charities/Oklahoma City University Immigration Assistance Program, and University of Tulsa Boesche Legal Clinic Immigrant Rights Program.
- Fund public law-related **educational** programs in the total amount of \$77,300. Awards were made to the OBA Young Lawyers Division High School Mock Trial Program, Teen Court Inc. of Comanche County, the Senior Law Resource Center, Inc. for legal and educational outreach services, William W. Barnes Children's Advocacy Center in Rogers, Mayes, and Craig counties, and the statewide YMCA Oklahoma Youth & Government Program for the Youth Legislative Day. An additional \$40,800 was also awarded for law-school scholarships.
- Promote **administration of justice** through programs for the judiciary and court system in the total amount of \$62,150 under the separate OBF Court Grants Program.

## Important 2013 Application Submission Information

OBF grants are awarded on an annual basis. Applicants are to submit **1 original and 14 printed copies** of the OBF Grant Application not later than **5:00 pm, CST on Tuesday, July 8, 2013** to receive consideration. Applications must be complete. Early application submission is encouraged.

**Oklahoma Bar Foundation**  
**Attn: Grants Program**  
**PO Box 53036**  
**Oklahoma City OK 73152-3036**

**Oklahoma Bar Foundation**  
**1901 N. Lincoln Blvd.**  
**Oklahoma City OK 73105-4901**

All applications must be postmarked or delivered no later than 5:00 pm, CST on Tuesday, July 8, 2013 to receive consideration. Applications may be delivered only between the hours of 8:30 a.m. and 5:00 p.m.CST, Monday through Friday. **Applications will not be accepted via e-mail or fax. Deliveries will not be accepted after 5:00 pm, CST.**

**Please carefully review the "2013 Grant Application Instructions and Requirements" before submission of your application packet.**



The OBF Grants and Awards Committee will review 2013 OBF Grant Applications and make recommendations to the Board of Trustees. **An applicant or appropriate representative is required to make a brief appearance and presentation before the Grants & Awards Committee, currently scheduled for Thursday, August 22, 2013, appointment time and location to be announced.** Applicants will receive written notification regarding disposition of their application during October 2013 following the grant deliberation process.

Questions about application preparation should be directed to the OBF Office at (405) 416-7070 or by e-mail to [foundation@okbar.org](mailto:foundation@okbar.org). Either PDF fill-in the blank forms or a Microsoft Word version of the complete Application Packet (2 parts –1. instructions and 2. forms) is available by e-mail to [foundation@okbar.org](mailto:foundation@okbar.org).

## Tax Exemption Status

Applicants must be organized as a non-profit philanthropic organization recognized by the Internal Revenue Service as a tax-exempt charitable organization under Section 501(c)(3) of the Internal Revenue Code, or in some instances, as an organization that will provide an exclusively charitable public service that would qualify as tax-exempt under Section 501(c)(3) to make application for OBF grant funding. If the organization is not a Section 501(c)(3) organization, the applicant must fully describe the nature of its tax-exempt status and provide additional information concerning its tax-exempt status and the exclusively charitable public service for which funds are requested. OBF does not fund political activities or organizations. OBF will not fund organizations or activities that do not fit within IRS 501(c)(3) guidelines within the scope and mission of the Oklahoma Bar Foundation; OBF awards are made for exclusively public purposes. A copy of the applicant's tax determination letter and two most recent IRS Form 990's are required as a portion of the application packet. <sup>1</sup>*Most tax-exempt organizations, other than churches, are required to file a yearly return or notice with the IRS. If an organization does not file as required for three consecutive years, the law provides that the organization automatically loses its tax-exempt status. Loss of exempt status means an organization must file income tax returns and pay income tax, and its contributors will not be able to deduct their donations.*

## Application Guidelines

- Grant applications should be to fund no longer than a twelve-month period.
- Grant awards are generally funded through periodic payments to the recipient.
- Grant recipients will be required, as a condition of continuing funding, to submit **written quarterly reports** on the progress of the funded project. A final written report will be due within 30 days of completion of the project. A sample "OBF Grant Quarterly Report Form" is attached for informational purposes only and the report should not be returned with your application.
- Grant recipients will periodically be asked to participate in OBF presentations. OBF Site Visits may be conducted. Grant recipients are required to annually provide at least two (2) narrative stories about your program or project successes, a testimonial type story from your volunteers, clients, students or other participants.
- Grant recipients are required to recognize the Oklahoma Bar Foundation in written materials, during program presentations, on the Website and various forms of media, and other venues. Samples of all recognition should be provided to the Foundation. Please see Public Recognition requirements below.
- Requests should be for exclusively public purposes.

## Public Recognition of the Oklahoma Bar Foundation

Grant recipients are required to recognize the Oklahoma Bar Foundation in written materials, during program presentations, on the organization Website and various other forms of media recognition, and other venues. Samples of recognition are to be provided to the Foundation. Failure to give OBF recognition may result in terminate of the grant and grantees may be asked to reimburse prior grant payments.

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<sup>1</sup> <http://www.irs.gov/charities/article/0,,id=217087,00.html>, January 12, 2011



## Grant Priorities

The following priorities will be considered in making grants, not necessarily in the order listed:

- The track record of the applicant including, but not limited to, fiscal responsibility and program stability.
- Other funding sources or potential funding sources to be able to sustain the program.
- Development and expansion of pro bono services.
- Special needs of the applicant.
- The potential of matching grant funds from another source.
- The benefits that will be derived from the project or program by the state, county or service area.
- Non-duplicative services.

## Technical Information and Instructions

If an applicant chooses to include a transmittal letter, that transmittal letter is to be placed behind the 2013 Cover Sheet and nothing is to be placed in front of the 2013 Cover Sheet.

Applications are required to address all of the following items and provide as much detail as is appropriate to assist the OBF Grants & Awards Committee in making award recommendations to the Oklahoma Bar Foundation Board of Trustees.

- 1) **OBF Grant Applications should be printed on 8 ½” “x 11” white papers, when forms are not provided.** Reduce all legal-size attachments to 8 ½” x 11” size.
- 2) Do not bind the OBF Grant Application or accompanying materials; use only one staple placed in the upper left corner through all materials.
- 3) Applicants must provide one original and fourteen copies of the Application and all accompanying materials. Do not place transmittal letters or other materials before the 2013 Cover Sheet.
- 4) OBF Grant Applications should contain the following information and be arranged in the following order:
  - a) **2013 Cover Sheet:** Complete the one-page 2013 Cover Sheet and place the Cover Sheet on top of the original and each copy as the first page of the application. No other materials should be placed before the Cover Sheet.

An official who has authority to bind the applicant organization to the proposed obligations must sign the 2013 Cover Sheet. If you reproduce the 2013 Cover Sheet in any way, you must present it in essentially the same format, include the same information, and limit the 2013 Cover Sheet to only one page.

The “Brief summary of grant request” should not exceed the allocated area. The main descriptive body of your request should be contained within the application following the cover sheet and is to be printed on 8 ½” X 11” white sheets of paper. The bottom portion of the 2013 Cover Sheet is for OBF use and should not be moved from the one-page 2013 Cover Sheet.
  - b) **Purpose:** Within the main describing body of your application, provide a description of your organization, date organized, brief history and purposes.
  - c) **Program/ Project Request Overview:** Continue on to provide a brief program or project narrative which defines the purpose of your organization and the program or project you request funding for; address the need for your program or project.

When describing your organization's community involvement and support, identify other organizations or projects within the geographical area that also provide the same or similar services, and describe any cooperative work between your organizations. Describe volunteer activities and pro bono utilization efforts, when applicable.

- 5) **All organizations are to provide the following information within the body of your application** for either the a) "legal services" portion or b) the "law-related education, improvements to the administration of justice, and all other programs" sections which immediately follow. Next proceed on to 6) through to completion of the application packet.
- a) **Organizations providing legal services to the disadvantaged and/or elderly including children should also include the following:**
- Staffing information.
    - Attach an itemized list of positions and salaries, attach job descriptions.
  - Community(s)/population served.
  - Expected number and types of clients served.
  - Overall community need for such services.
  - Specific priorities for the program or project.
  - Your method of selection of those priorities.
  - Statistical summary of caseload data for most recent past year.
- b) **Law-related education programs, programs to improve the administration of justice, and all other programs should also include the following:**
- Staffing information.
    - Attach an itemized list of positions and salaries, attach job descriptions.
  - Community(s)/population served.
  - Program goals and objectives.
  - Timetable of activities to completion.
  - Statistical summary for the most recent past year programming.
- 6) **Your Program or Project Evaluation:**
- Provide information on how your organization plans to measure and report your program or project's goals and successes (outcomes) to the Oklahoma Bar Foundation so your program progress can be better monitored. (*information is to be reported in the "OBF Quarterly Reports" to OBF.*)
- 7) **Additional Required Program Information:**
- Include a list of your Board of Directors or Trustees and Officers; identify and describe their professional background:
    - The percentage of the Board that has made a personal "financial" contribution to your organization in the past year.
    - Any compensation, financial and other, any Board member may have received from your organization within the past 3 years.
    - The percentage of your Board who are Oklahoma Bar Foundation Fellow Program participants. Do they provide other donations to the OBF?
  - Whether an outside consultant has been retained to help raise funds for your organization and, if so, the terms and results of that arrangement.
  - Whether any staff persons receive compensation for fund-raising activities as a part of their job duties and, if so, the terms of that compensation.
  - Whether a lobbyist has been retained and the terms and extent of that engagement.



- Your organization’s mission statement and its charitable purposes and how these charitable purposes are accomplished.
- 8) **Impact:** Explain how your program or project would be impacted without an OBF grant. Include a lesser request amount that would still benefit your organization and briefly define how the lesser request amount would be applied.
  - 9) **Other Activities:** Does your organization engage in any direct or indirect political activities? Does your organization engage in lobbying activities? Does your organization pay for lobbying services? If yes to any of these questions, provide an explanation.
  - 10) **Tax Status:** Provide a copy of your most recent IRS tax-exempt determination letter. If you do not have an IRS tax-exempt determination letter, provide a detailed explanation; see page 3 of these Instructions and Requirements for more tax status information.
  - 11) **Tax Forms:** Provide two copies of your organizations last two years IRS Form 990’s or other appropriate tax forms. If your organization did not file an IRS Form 990 or other appropriate tax forms, provide a detailed explanation and the last date your organization did file with the IRS.
  - 12) **Audited Financials:** Provide two copies of your last two years audited financial reports.
    - Have you or your organization become aware of a material diversion of the organization’s assets? If yes, provide an explanation of the diversion.
  - 13) **Financial Information & Budget Sheet:** Fully complete the Financial Information & Budget Sheet included in this packet and also attach a Budget Narrative.

The **Budget Narrative** is to include, but is not limited to the following:

- List the total amount of your grant request.
- Include all other income sources. Describe the organization’s efforts to obtain additional funding and other community support, including the possibility of OBF grant funds generating funds from other sources such as but not limited to matching grants. Disclosure of all sources of funding is required.
- Include an itemized listing of staffing positions and salary.
- Include general and operational expenses.
- Fully complete the attached Financial Information and Budget Sheet.
- If the grant request is for equipment, or if a portion of the request is for equipment in excess of \$500, include copies of three price quotations for that equipment and breakout any labor/installation charges from the equipment quotations.
- Designate any donated (in-kind) goods and/or services, including these amounts under revenue or expense as is applicable.
- Include financial information for the three years indicated on the Budget Sheet. You may alter line items to conform to your organization’s revenue and expense categories.

**OBF Grant Applications Forms are located in a separate file from the Instructions and Requirements, titled “OBFGrt-Forms2013-Part2of2.pdf”. Most of your grant application will be printed in the body of the application packet on blank 8 ½” by 11” paper that is to accompany the OBF Grant Application Forms. The one-page “2013 Cover Sheet” is to be placed on the front of each application copy with nothing before it.**

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

***Thank you for your interest in the Oklahoma Bar Foundation grant application process.***