

2024 Grant Application

Funding Level B

(Direct Providers of Civil Legal Services)

New Applicants

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[www.oregonlawfoundation.org](http://www.oregonlawfoundation.org)

# Our Vision

An Oregon where the legal system is trusted, fair, accessible, and serves the needs of all.

# The Oregon Law Foundation

The Oregon Law Foundation was organized in 1981. We make grants to law-related charitable programs throughout Oregon in support of our mission.

Our chief source of income is the Interest on Lawyers’ Trust Accounts (IOLTA) program. Under rules adopted by the Oregon Supreme Court in 1989, interest generated by small or short-term deposits of client funds held by Oregon lawyers is paid to the Foundation. Because both Oregon lawyers and Oregon bankers believe in the principle of justice for all, we can supply significant support to our grantees. Leadership Banks and Credit Unions choose to pay us above market interest rates, and when Oregon lawyers choose to use these financial institutions, there is more funding to support justice for all.

# Our Mission

The Oregon Law Foundation builds a more equitable legal system to support and fund justice for all in Oregon by:

* Ensuring access to civil legal help for people with low incomes, or who experience other systemic barriers;
* Promoting equity, diversity, and inclusion in the legal community; and
* Educating the public about the law and the legal system.

# Grant Procedure

The OLF Board of Directors makes grants once each year, in December, for payments starting the following March. In the absence of special circumstances, the funding period for successful applicants is one year. Programs receiving funds will be asked to account for their use of grant funds by submitting their most recent audited financial statements and other reports to the Oregon Law Foundation.

To be considered by the OLF for the 2024 grant year, completed grant applications must be received by the Foundation not later than 5:00 p.m., Monday, **October 2, 2023**.

Electronic copies are preferred and may be emailed to oregonlawfoundation@osbar.org. Paper applications may be mailed to the OLF at P.O. Box 231935 Tigard, OR 97281-1935.

Applicants will be notified of the full board’s action by mid-December.

# Grant Application Instructions

Applicants must complete all forms included in this application. To accomplish this, click on the shaded areas and type in the information. Do not worry about overfilling the cell or formatting. Return the completed application electronically by emailing a copy to oregonlawfoundation@osbar.org and the Foundation will take care of the duplication of copies. Technical issues with the application can be directed to oregonlawfoundation@osbar.org.

**Please include the following documentation with the grant application if available:**

* Current Board Roster
* Proof of tax-exempt status
* Most recent audited financial statements

For further information, please email oregonlawfoundation@osbar.org

# New Applicant Cover Sheet

**This application is for Category B organizations that do *not* receive funding from the OLF for the current calendar year, 2023. If your organization is currently receiving OLF funding, fill out the Current Grantee application instead.**

Please see the definitions of funding categories from the OLF’s Policies & Procedures on the last page of this application.

**Organization Information**

Name of Organization Tax ID

Web Site

Organization Address City State Zip

**Chief Administrative Officer**

Name of Chief Administrative Officer Chief Administrative Officer Title

Chief Administrative Officer Email Chief Administrative Officer Phone

**Application Preparer**

Name of Application Preparer Application Preparer Title

Application Preparer Email Application Preparer Phone

**Who Should the OLF Contact with Questions (if different from application preparer)?**

Name of OLF Contact Contact Title

Contact Email Contact Phone

**Program Information (if your law help program is a division or sub part of a broader organization)**

Name of Law Help Program

Name of Director or Head of Law Help Program Director/Head Title

Director/Head Email Director/Head Phone

* **Attach a current roster of the organization’s board of directors.**

Grant Amount Requested $

Describe your program’s mission in one sentence.

Give a one-paragraph summary of this grant request.

**What type of Application are you submitting?**

Note: Most Oregon Law Foundation grants are provided as General Operating Grants.

[ ]  **General Operating Grant**

For General Operating Grants, describe the range of legal help and other services (community legal education, legislative/administrative rulemaking advocacy, etc.) that your program provides.

[ ]  **Special Project Grant**

For Special Project Grants, describe the project you are seeking funding for and the role of OLF funds.

# Program History/Scope

Please provide a one-paragraph description for each category of information requested below. If no response is available, please explain why.

1. Describe the history and purpose of your program along with its major services and activities.

1. What community(ies) does your program serve?

1. How does your program determine community needs and set program priorities? Describe the high-level findings of your most recent needs assessment, if you made changes to your client services based on that assessment, please describe the changes, and any role your client communities played in determining need, deciding priorities, and shaping your service delivery plan.

1. How does your program partner with other programs addressing similar issues or serving the same client communities to maximize service available and prevent duplication?

1. Eligibility income guidelines and fees charged to clients, if any. *Examples of client fee descriptions: "$5 application fee" or "$25 per hour for income below 200% of the Federal Poverty Guideline."*

1. How does your program assess its performance, effectiveness, and outcomes; what does your program care most about when assessing performance, effectiveness, and outcomes; and what were the results of your most recent program assessment?

# Staff and Board

1. **Provide information on board and staff diversity using the New Category B Application Data Excel Workbook. If your law help program is a division or sub part of a broader organization, please supply staff information only for your legal program**:

One component of the Oregon Law Foundation’s mission is promoting equity, diversity, and inclusion in the legal profession. Women, people from racial and ethnic minority backgrounds, people who openly identify as LGBTQAI+, and people with a disability have a history of encountering barriers to advancement in the legal profession. We are collecting the following information to help identify where these barriers exist in our grantees so we can work together to dismantle them. Data will be used primarily in aggregate—either across all grantees or in groups of grantees with similar missions—however, if statistically significant barriers can be identified in individual grantees, we will explore those individual organization barriers as well.

1. Describe your efforts to recruit and retain lawyers and staff from racial and ethnic minority backgrounds, who openly identify as LGBTQAI+, and who live with a disability, and what successes and challenges you have encountered.

# Equity

The Oregon Law Foundation’s 2018 legal needs study showed that people from racial and ethnic minority backgrounds in Oregon experience numerically more and more severe civil legal problems than those who do not come from racial and ethnic minority backgrounds.

1. How does your organization ensure that the voices and needs of your client community are heard and understood by your board?

e.g., client community board representation, hands-on board involvement in work, board involvement in conversations with community partners and clients, etc.

1. How does your organization ensure that your staff and board have the competency and capacity to address the fact that poverty and civil legal issues disparately affect people from racial and ethnic minority backgrounds?

e.g., education, training, research, recruitment, listening sessions, etc.

1. How does your organization address the fact that poverty and civil legal issues disparately affect people from racial and ethnic minority backgrounds?

e.g., targeted outreach, engaging community partners, setting priorities and case acceptance criteria to mitigate disparities, research, systemic advocacy to end disparate outcomes, etc.

# Tax Status

1. Is your organization currently recognized as a tax-exempt organization?

[ ]  Yes, 501(c)(3)

[ ]  Yes, other (indicate kind):

[ ]  No, (describe applicant’s tax status and charitable purpose):

1. If your organization is not a 501(c)(3), describe the applicant’s organizational status.

* **Attach a copy of the organization’s most recent letter from the IRS determining tax status.**

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# Statistical Case Report

**Provide staff and pro bono case information using the New Category B Application Data Excel Workbook.**

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# Budget

**Provide Budget information using the New Category B Application Data Excel Workbook.**

# **Grantee Standards, Guidelines, and Funding Categories**

All applicants must meet the following standards to be eligible to receive funding from the Foundation:

## **Standards**

1. The applicant's legal status, operation, and proposed use of Oregon Law Foundation (OLF) funds must not jeopardize the OLF's funding or 501 (c) (3) tax-exempt status.
2. The applicant's proposed use of OLF funds must be consistent with the OLF's mission as revised from time to time.
3. The applicant must identify and quantify the needs to be met by its proposed use of OLF funds.
4. The applicant must keep accurate and reliable records of the services it provides.
5. The applicant must maintain financial records according to generally accepted accounting standards, prepare annual operating budgets and financial statements available for OLF review, and otherwise demonstrate fiscal responsibility and integrity.
6. The applicant must demonstrate a clear ability to deliver quality services.
7. The applicant must assure the OLF that, to the best of applicant's knowledge and except as disclosed on its application, no other grantor will withdraw or reduce funding as a consequence of applicant's receipt of OLF funding.
8. The applicant must not discriminate on the basis of race, color, national origin, religion, sex, sexual orientation, age or handicap with regard to employees, applicants for employment or recipients of services.
9. An applicant who received funds in the prior year must comply with the reporting requirements in Section III.

## **Guidelines**

In considering applications the Foundation will use the following guidelines:

1. The OLF may fund an applicant's general operating expenses as well as specific projects or programs.
2. Whether the applicant has an organizational structure which results in effective and efficient management and governance.
3. Whether the applicant has administrative costs, as distinguished from program delivery costs, that are controlled and minimized.
4. Whether the applicant has a history of stable operations - but the OLF will consider funding startup applicants as well as innovative programs.
5. Whether the applicant supports and promotes such diversity as is feasible in its governing body, staff, programs, and clientele.
6. Whether the applicant offers the opportunity, if appropriate, for volunteer assistance.
7. Whether the applicant has effective mechanisms for client input and feedback.
8. The OLF prefers not to fund a new program which duplicates an existing program but will consider funding a new program which demonstrates a likelihood of substantial improvement over the existing program.
9. Whether the applicant has established or is in the process of establishing, practical methods for identifying needs and evaluating results.
10. Whether the applicant can achieve desired and intended results in a cost-effective manner.
11. Whether the applicant, where practicable, can identify and develop additional and alternative funding sources in light of OLF's history of substantial income fluctuation.
12. Whether the applicant is cooperative with other service providers.

## **Grantee Requirements**

1. The grantee must provide a narrative report describing how the OLF funds were spent and the results achieved. This report will be made in the annual grants application and will cover the first eight months of the program year preceding the submission of the application.
2. If a grantee is not submitting an application for the upcoming year, a narrative report describing how the OLF funds were spent and the results achieved must be submitted by September 30.
3. For Category A and Category B grantees, an additional Statistical Case Service Report must be submitted by May 1 following the grant year.
4. The OLF expects to be acknowledged for its funding assistance in public relations activities by grantees.

## **Funding Categories**

Each applicant will be assigned to a specific Funding Level. As used in these criteria, the term "critical need" means an urgent need for legal advocacy to protect the most basic necessities of existence for eligible clients, such as physical safety, health, shelter, subsistence income, custodial rights, and civil rights. The percentages set forth below for each Funding Level are subject to temporary adjustment in response to an emergency which could not have been anticipated.

### Funding Category A

Funding Level A is reserved for the Association of Oregon Legal Services Programs as funded on January 1, 2000. The OLF ordinarily will award 65% of its grant funds to Level A applicants. However, in any given year the OLF may award as little as 55% or as much as 80% of its grant funds to Level A applicants in recognition of other funding available to them, particularly available governmental funding.

### Funding Category B

Funding Level B is reserved for those other applicants which are direct providers of civil legal services to their clients. The OLF ordinarily will award 30% of its grant funds to Level B applicants. However, in any given year the OLF may award as little as 15% or as much as 35% of its grants to Level B applicants in recognition of other funding available to them.

### Funding Category C

Funding Level C is reserved for applicants which educate the public about the law or promote diversity in the legal profession in Oregon. The OLF ordinarily will award 5% of its grant funds to Level C applicants. However, the funds awarded by the OLF to Level C applicants in any given year may vary from 0% to 10% of OLF grant funds in recognition of the percentage of its funds which are awarded to applicants in Levels A and B.

The income available to the OLF for making grants can vary substantially from year to year. Generally, the OLF will award grants out of its current income. Also, in order to minimize fluctuation in its grant awards, the OLF maintains a reserve.

*Adopted by the OLF Board May 2018*