

2023 Grant Application

Funding Levels A & B

Current Grantees

# Background and Mission of the Oregon Law Foundation

The Oregon Law Foundation was organized in 1981 by the Oregon State Bar. Its purpose is “to generate and use Foundation income for the benefit of the public of Oregon, supporting programs which advance and promote the rule of law in a just society.”

The OLF makes grants to law-related charitable programs throughout Oregon in support of its mission to (1) support access to justice in Oregon by obtaining and distributing funds to provide legal services to persons of lesser means, (2) promote diversity in the legal profession, and (3) educate the public about the law.

OLF’s 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 paid to Oregon lawyers’ trust accounts is forwarded to the Foundation.

# 2022 Board of Directors

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 Bill Penn Executive Director

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# 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 the money by submitting their most recent audited financial statements and other reports to the Oregon Law Foundation.

To be considered by the OLF for the 2023 grant year, completed grant applications must be received by the Foundation not later than 5:00 p.m., Friday, **October 3, 2022**.

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, for payments to begin the following March.

# 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.

If you are going to submit the application in hard copy, please submit one (1) copy.

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

* Current Board Roster
* Most recent audited financial statements

For Further Information, please email oregonlawfoundation@osbar.org

# Grant Application Cover Sheet

**This application is for organizations that receive funding from the OLF for the current calendar year, 2022. If your organization does *not* receive funding from the OLF for the current year, fill out the New Grantee application instead.**

|  |  |
| --- | --- |
| Applicant Program/Agency Name |       |
|  Phone |       |
|  Address |       |
|  Name of Chief Administrative Officer |       |
|  Tax ID number |       |
|  Organizations website |       |
| Person Preparing Application  |       |
|  Title |       |
|  Phone |       |
|  Email |       |
| Board Chair (or equivalent)  |       |
|  Phone |       |
|  Address |       |
|  Email |       |

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

Grant Amount Requested $

Please check the funding category under which these funds are requested. Please see the definitions of funding categories found at OLF Grantee Standards, Guidelines and Funding Categories, Section IV.

[ ]  1. Funding Category A: Association of Oregon Legal Services Programs,

[ ]  2. Funding Category B: Direct providers of civil legal services to their clients,

Below, please give a one-paragraph summary of the grant request:

# Program History/Scope – For Funding Levels A & B

(This includes the Association of Oregon Legal Services Programs and those other applicants which are direct providers of civil legal services to their clients.)

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

1. History and purpose of organization.

1. Programmatic scope describing the following:
	1. community(ies) served.

* 1. community need for service including assessment of client need and determination of client/program priorities.

* 1. number and types of clients.

* 1. partnerships with other programs that provide a similar service in the community to maximize services available and prevent duplication.

1. Describe how OLF funds will be used in the scope of the service delivery plan.

1. Describe any strategic planning efforts concerning how fundraising efforts can be improved to meet client need that your program’s governing board has engaged in.

1. Eligibility income guidelines and fees charged to clients, if any.

1. Staff caseload.

1. Methods the program uses to measure its overall effectiveness in the community. How is the program’s success measured (attach separate report on program outcomes)?

# Staff and Board

1. Provide information on board and staff diversity as outlined below:

One component of the Oregon Law Foundation’s mission is promoting diversity 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.

In the total number column, enter the number of all board members or employees at that seniority level. In the remaining columns, enter the number of board members or employees who have identified to you that they have the indicated background. You will count some employees in multiple columns.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Total Number** | **# Women** | **# Racial/ Ethnic Minority Women** | **# Racial/ Ethnic Minority Men** | **# LGBTQAI+** | **# With a Disability** |
| **Board Members** |       |       |       |       |       |       |
| **Lawyer Senior Management/ Executive Director** |       |       |       |       |       |       |
| **Non-lawyer Senior Management/ Executive Director** |       |       |       |       |       |       |
| **LawyerFirst/ Mid-level Managers** |       |       |       |       |       |       |
| **Non-lawyerFirst/ Mid-level Managers** |       |       |       |       |       |       |
| **LawyerNon-management** |       |       |       |       |       |       |
| **Non-lawyer Non-management** |       |       |       |       |       |       |

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.

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.

# 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 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

Is the applicant currently recognized as a tax-exempt organization?

[ ]  Yes, 501(c)(3)

[ ]  Yes, other (indicate kind):

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

# Statistical Grant Report

For current Grantees, the Statistical Grant Report is not due at this time. The OLF will request a Statistical Grant Report consisting of case closure numbers, client demographics, and a breakdown of actual revenue and expenses on May 1 following the close of the grant year. The most recent version of the Statistical Grant Report form is available on the OLF website.

# Budget

## Instructions

Enter Revenue and Expenses on the following pages.

Column A: Outline how the grant funds requested will be spent in 2023. Please note in this column Total Expenses should equal Oregon Law Foundation Funding from the Revenue page, and Net Revenue After Expenses should equal 0.

Column B: This column should be completed only if the grant funds requested will be used to fund a specific project within the organization.

Column C: Provide the organizations Overall budget for 2023.

Column D: Same as B but for 2024.

Column E: Same as C but for 2024.

Column F: Same as B but for 2025.

Column G: Same as C but for 2025.

**Column B** for lines 5-14 should match up with the amounts listed on the Income Sources sheet**.**

Attorney Fees: If you charge clients for services, please include in 1a. Program Revenue. If you receive Attorney Fee Awards from opposing parties, please include in j2. Attorney Fee Awards.

If you prefer to use a spreadsheet for the Budget and Income Sources, an application budget spreadsheet is available from <https://olf.osbar.org/apply/>

* **Attach a copy of the applicant’s most recent audited financial statements.**

# Budget

## Revenue Projections

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **A.OLF (IOLTA) Funds 2023** | **B.Specific Project Budget 2023** | **C.Organization Budget 2023** | **D.Specific Project Budget 2024** | **E.Organization Budget 2024** | **F.Specific Project Budget 2025** | **G.Organization Budget 2025** |
| **Revenue** |
| **1** | **Earned Income** |
|   | a | Program Service Revenue (Line 1) |   |   |   |   |   |   | **$0** |
|   | b | Investment Income |   |   |   |   |   |   | **$0** |
|   | c | Others |   |   |   |   |   |   | **$0** |
|   | **d** | **Total Earned Income** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** |
| **2** | **Unearned Income** |
|   | j. | City/County/Local Government (Line 2) |   |   |   |   |   |   | **$0** |
|   | a-b. | State Funding (Line 3) |   |   |   |   |   |   | **$0** |
|   | g-i. | Federal Funding (Line 4) |   |   |   |   |   |   | **$0** |
|   | c. | Oregon Law Foundation |   |   |   |   |   |   | **$0** |
|   | d. | Other Foundations (Line 5) |   |   |   |   |   |   | **$0** |
|   | g2. | Community Funds (Line 6) |   |   |   |   |   |   | **$0** |
|   | e-f. | Law Firms & Lawyers (Line 7) |   |   |   |   |   |   | **$0** |
|   | k. | Bar Associations/Groups (Line 8) |   |   |   |   |   |   | **$0** |
|   | l. | Corporate (Line 9) |   |   |   |   |   |   | **$0** |
|   | m. | Individual Contributions (non-lawyer) |   |   |   |   |   |   | **$0** |
|   | j2. | Attorney Fees Awards |   |   |   |   |   |   | **$0** |
|   | h2,i2,o | Other (Line 10) |   |   |   |   |   |   | **$0** |
|   | **p.** | **Total Unearned Income** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** |
| **3** | **Total Revenue** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** |

# Budget

## Expense Projections

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **A.OLF (IOLTA) Funds 2023** | **B.Specific Project Budget 2023** | **C.Organization Budget 2023** | **D.Specific Project Budget 2024** | **E.Organization Budget 2024** | **F.Specific Project Budget 2025** | **G.Organization Budget 2025** |
| **Expenses** |
| **1** | **Program Services** |
|   | a. | Program Related Personnel |   |   |   |   |   |   | **$0** |
|   | b. | Contract Services |   |   |   |   |   |   | **$0** |
|   | c. | IT/Communications |   |   |   |   |   |   | **$0** |
|   | d | Occupancy |   |   |   |   |   |   | **$0** |
|   | e. | Travel |   |   |   |   |   |   | **$0** |
|   | f. | Materials/Supplies |   |   |   |   |   |   | **$0** |
|   | g. | Program Evaluation |   |   |   |   |   |   | **$0** |
|   | h. | Other Program Services |   |   |   |   |   |   | **$0** |
|   | **i.** | **Total Program Services** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** |
| **2** | **Administration** |
|   | a. | Administration Costs including non-program personnel |   |   |   |   |   |   | **$0** |
|   | b. | Fundraising/Outreach including personnel |   |   |   |   |   |   | **$0** |
|   | c. | Other |   |   |   |   |   |   | **$0** |
|   | **d.** | **Total Administration** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** |
| **3** | **Total Expenditures** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** | **$0** |
|   |   |   |   |   |   |   |   |   |   |   |
| **Net Revenue After Expenses** |   | $0 | $0 | $0 | $0 | $0 | $0 | $0 |

# Income Sources (**Budget Detail**)

|  |  |  |
| --- | --- | --- |
| **Source** | **$ Requested/Pending** | **$ Committed** |
| **1.** **Program Service Revenue.** List earned income including the sale of goods and services, legal fees collected from clients, rents received, etc. |
|   |   |   |
|   |   |   |
|   |   |   |
| **2.** **City/County/Local Government.** List all public sources of funds from city, county and state agencies. **This does not include federal funds.** If the applicant receives allocations through city, county or local offices, such as social service departments, list sources. |
|   |   |   |
|   |   |   |
|   |   |   |
| **3. State.** List all public sources of funds from state agencies. **This does not include federal or local funds.** If the applicant receives allocations through state offices, such as social service departments, list sources. |
|   |   |   |
|  |  |  |
|  |  |  |
| **4. Federal.** List all sources of funds from federal sources including Legal Services Corporation; Title XX, Title III; Title IV; Community Development Block Grants; Revenue Sharing; Action/Vista; other federal grants. |
|   |   |   |
|   |   |   |
|   |   |   |
| **5. Other Foundations.** List private charitable foundation funds. |
|   |   |   |
|   |   |   |
|   |   |   |
| **6. Community Funds.** List community non-profit organization funds, e.g. United Way, Community Chest, and other consolidated funds. |
|   |   |   |
|   |   |   |
|   |   |   |
| **7. Law Firms & Lawyers**. List all funds from law firms, including support from annual fundraiser/benefit over $200. |
|   |   |  |
|   |   |  |
|   |   |  |
| **8. Bar Associations/Groups**. List state, local, and specialty bar associations and related organizations which provide monetary contributions.  |
|   |   |   |
|   |   |   |
|   |   |   |
| **9. Corporate**. List all funds received from corporations, corporate foundations, and corporate law departments. |
|   |   |   |
|   |   |   |
|   |   |   |
| **10. Other.** List all other sources of income. List individually if more than 5% of total revenue. Continue on another sheet of paper if necessary. |
|   |   |   |
|   |   |   |
|   |   |   |

# Grantee Report (**for current grantees**)

**Name of Grantee Grant Period**

**Provide an overview of how you used the funds provided by the OLF to continue or expand your organization’s services:**