



## 2007-2008 ANNUAL GRANTS PROGRAM

### APPLICATION CRITERIA, INSTRUCTIONS AND CONDITIONS

Through its Annual Grants Program, the California Bar Foundation supports innovative and worthy efforts to build a better justice system by funding projects in furtherance of its mission to improve access to the justice system, educate the public about legal rights and responsibilities, foster confidence in the rule of law, and promote philanthropy as a core value of the state's lawyers. Please visit the Foundation's website at [www.calbarfoundation.org](http://www.calbarfoundation.org) for a list of prior grantees, projects, and grant amounts.

#### Grant Cycle

Grant Applications should be submitted for projects taking place in 2008. The Application Deadline for the 2007-2008 grant cycle is October 10, 2007 at 4:30 p.m. (the deadline for State Bar Applicants is 4:30 p.m. on October 24, 2007). Applicants will be notified in writing of the grant decision in December 2007. Grant recipients will receive an award letter setting forth grant payment arrangements, and will also receive a Grants Condition Form setting forth the terms and conditions of the grant.

**APPLICATION DEADLINE:**  
**OCTOBER 10, 2007**  
**@ 4:30 P.M.**

(Application Deadline for State Bar:  
October 24, 2007  
@ 4:30 p.m.)

#### Program Eligibility

The Grants Program is open to nonprofit organizations serving the public of California, local, minority, and specialty bar associations, the State Bar of California and its entities, and California courts in support of projects that build a better justice system in furtherance of the Foundation's mission. Grants are not awarded to individuals.

#### Criteria

For the 2007-2008 funding cycle, priority will be given to projects that:

- Increase access to the justice system,
- Serve rural populations, and/or
- Support diversity in the legal profession.

Preference is given to:

- Grants of partial, rather than full, funding. Applicants are encouraged to seek additional funding, and Grant Applications must indicate efforts to secure additional funding.
- Projects in collaboration with other community organizations.
- Organizations that have been in existence for at least three years.
- Projects supporting diverse or underrepresented communities.

The Foundation typically awards one-year grants on a "one-time only" basis but will consider funding a project where expenditures are spent over up to a two-year period. Also, under special circumstances, requests for additional funding will be considered upon submission of a new grant application during a subsequent grant cycle.

*The Foundation reserves the right to revise, change and expand its funding preferences and grant criteria at any time, without notice, and may adopt additional criteria that it chooses not to publish.*

## Instructions for Submission

1. All portions of the Grant Application (Cover Sheet, responses to the Questionnaire, Signature Page, and all supporting documentation) must be received by the Foundation by or before 4:30 p.m. on October 10, 2007 (the deadline for State Bar applicants is 4:30 p.m. on October 24, 2007).
2. Applications may be submitted by fax, mail, or delivery service to:  

California Bar Foundation  
180 Howard Street  
San Francisco, CA 94105-1639  
Fax: 415-856-0788  
Attention: Program Director
3. Applications postmarked by the Application Deadline but not received in full by the Application Deadline may not be accepted.
4. An electronic version of the Grant Application is available at [www.calbarfoundation.org](http://www.calbarfoundation.org).

## Conditions

Successful Applicants will be required to sign a Grant Conditions Form and agree to comply with certain terms and conditions set forth by the Foundation, including but not limited to the following:

1. Provide the Foundation a year-end report describing the use of the entire amount funded and results of evaluations of the Project.
2. Acknowledge the California Bar Foundation on all printed materials and all publicity related to activities supported by Foundation grants.
3. Obtain approval from the Foundation in advance for material variances from either (a) the use of funds of a grant, or (b) the timeframe of the Project, as described in the Grant Application.
4. Provide requested documentation, including financials, and accommodate reasonable site visits by the Foundation during the year in which grant funds are used by Applicant.





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## GRANT APPLICATION COVER SHEET

### Applicant Information

Applicant:	
Type of Organization:	<input type="checkbox"/> 501(c)(3) <input type="checkbox"/> Local, minority, or specialty bar association <input type="checkbox"/> California court <input type="checkbox"/> State Bar of California or related entity <input type="checkbox"/> Other _____
Address:	
Phone:	
Fax:	
Web Address:	
Contact Name & Title:	
Contact Phone:	
Contact Email:	
Has Applicant received Foundation funds before?	<input type="checkbox"/> No <input type="checkbox"/> Yes; if yes, provide date(s), amount(s), and project name(s):

### Project Information

Project Name:	
Is this a new Project?	<input type="checkbox"/> No <input type="checkbox"/> Yes
Total Project Cost:	
Amount Requested:	

Using only the space provided, briefly describe the Applicant and the Project:



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### GRANT APPLICATION QUESTIONNAIRE

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#### Application Instructions

1. Answer each item listed under the sections entitled "Application Information and Project Description" and "Project Budget" in the format of the application (include the heading for each question).
2. Responses to the Grant Application Questionnaire should be no more than three pages, *not* including required attachments.
3. Include Applicant's name on the top right-hand side of each page of the responses to Grant Application Questionnaire and the attachments.
4. Submit all application materials without staples or clips, on one-sided, letter-sized paper.
5. Provide only one copy of the application materials.
6. Provide materials in the following order:
  - Grant Application Cover Sheet
  - Responses to "Application Information and Project Description" and "Project Budget"
  - "Financial Attachments" and "Organizational Attachments" in the order set forth below
  - Signature Page
  - State Bar Affiliation Supplemental Signature Page (only applicable for State Bar of California Applicants)

#### Attachments

Provide the following:

##### **Financial Attachments\*:**

1. Copy of Applicant's financial statements *for the prior fiscal year* (if applicable, provide audited financial statements).
2. Copy of Applicant's budget or draft budget *for the upcoming fiscal year* in which awarded grant funds would be used. If a budget or draft budget for the upcoming fiscal year is not yet available, provide the budget from the current fiscal year and describe any known variances expected in the coming year.
  - If budget includes a surplus for the next fiscal year, include an explanation of whether or not surplus funds are available to fund the Project, and if not, why.
  - If the Project will generate revenues for Applicant, attach an estimate of the amount of such revenue.

\* If Applicant is a subsidiary, joint venture, partnership, division, or section of another entity, provide the financial information of Applicant. If relevant, also provide the budget of the parent entity.

##### **Organizational Attachments:**

1. Roster of Board of Directors, identifying the officers.\*\*
2. Copy of Applicant's IRS Determination Letter, if applicable.

\*\* Please note any changes to Applicant's Board of Directors, if known, that will occur during the calendar year in which the grant would be used.



## GRANT APPLICATION QUESTIONNAIRE

(page 2 of 2)

### Applicant Information and Project Description

Provide the following information about the Applicant and the Project for which Applicant is requesting funding:

1. Applicant's mission statement and a brief history of Applicant.
2. Detailed Project description.
3. Identify the target group, the estimated number of persons to be reached, and the geographic impact of the Project.
4. Identify the need Applicant's Project will serve and how Applicant's Project will address that need.
5. Describe how Applicant will measure the success of the Project.
6. List how many staff members Applicant will need to implement the Project (list position, salary and benefits, and indicate whether current or new hire). If none, please describe how staffing needs will be met.
7. Identify any other organization with which Applicant is collaborating on this Project.
8. If funding in addition to any Foundation Grant awarded is necessary, indicate where Applicant will obtain the additional funding that the Project needs for implementation, and whether the Project can be implemented without such additional funding.
9. Describe how Applicant will be able to implement this program within the Project's estimated timeline without Foundation funding, if at all.
10. Describe if the Project is new and innovative.
11. If the Project will continue beyond the 2008 calendar year, describe how the Project will be funded in the future.
12. Describe the general timeline for implementation of the Project.

### Project Budget

Provide a detailed budget for the Project for each of the following items. Identify which of the Project costs are already included in Applicant's annual budget.

Project Staff	\$
Materials/Supplies	\$
Space	\$
Travel	\$
Copying/Printing	\$
Meeting/Conference Costs	\$
Telephone	\$
Other: _____	\$
Other: _____	\$
Other: _____	\$
<b>Amount of Total Project Budget</b>	<b>\$</b>
Amount of funding requested from the California Bar Foundation	\$
Amount of other funding for the Project	\$
Anticipated source(s) of other funding: _____	\$



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### GRANT APPLICATION SIGNATURE PAGE

This page must be signed and submitted along with the Grant Application Cover Page, responses to Grant Application Questionnaire, and all supporting documentation by the Application Deadline.

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The undersigned represents and/or acknowledges all of the following:

1. S/he has full authority to sign this application on behalf of Applicant Organization and that when so signed it will be binding on Applicant Organization.
2. The information contained in this application (including all attachments) is true and correct to the best of his/her information and belief.
3. Successful Applicants will be required to sign a Grants Conditions Form prior to disbursement of a grant award.

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

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

Name: \_\_\_\_\_

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

Signing on behalf of:

Regarding:

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Organization

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Project Name



## 2007-2008 ANNUAL GRANTS PROGRAM

### STATE BAR AFFILIATION SUPPLEMENTAL SIGNATURE PAGE

*(to be submitted by The State Bar of California and its affiliates)*

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This Applicant has my approval to submit the foregoing grant application to the California Bar Foundation.

By: \_\_\_\_\_

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

Name: \_\_\_\_\_

Title: Executive Director, The State Bar of California

Signing on behalf of:

Regarding:

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State Bar Division / Entity

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Project Name