



## 2011-2012 ANNUAL GRANTS PROGRAM

### APPLICATION CRITERIA, INSTRUCTIONS, AND CONDITIONS

Through its Annual Grants Program, the California Bar Foundation funds projects that further its mission to champion full and equal access to the justice system, invest in the next generation of California's lawyers, educate Californians about their rights and responsibilities under the law, and promote philanthropy throughout the legal community. 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 2012. The Application Deadline for all applications for the 2011-2012 grant cycle is October 5, 2011, at 4:30 p.m. Applicants will be notified in writing of the grant decision in December 2011. Grant recipients will receive an award letter setting forth grant payment arrangements and a Grants Condition Form setting forth the terms and conditions of the grant.

**APPLICATION  
DEADLINE:  
OCTOBER 5, 2011  
4:30 p.m.**

#### Program Eligibility

The Annual Grants Program is open to nonprofit organizations serving the public of California, local, minority, and specialty bar associations, the State Bar of California, 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.

#### Funding Guidelines & Criteria

**Grant Size:** We intend to fund most grants at the \$15,000-\$25,000 level. The Foundation will support a limited number of smaller projects, typically from smaller organizations, at the \$1,000-\$10,000 level of funding. If you are a small organization, we encourage you to apply for the lower level of funding.

**Grant Duration:** Although most grants will be single-year allocations, the Foundation will consider two-year grant proposals.

**Priority Areas:** For the 2011-2012 funding cycle, the Foundation will **exclusively** fund projects that fall within one or both of the following priority areas. Projects outside these priorities will **not** be considered for funding.

- **Rural** – projects that improve or increase the delivery of legal services and/or legal education to areas outside of the state's major metropolitan areas.
- **Diversity** – projects that support diversity in the legal profession.

#### Particular attention will be paid to:

- Projects that involve building and improving upon organizational effectiveness, including collaboration with other community organizations, management training, and fund development.
- Projects supporting diverse, low-income, or under-represented communities;
- Organizations that have been in existence for at least three years.

*The Foundation reserves the right to revise, change, and expand its funding guidelines and 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 4:30 p.m. on October 5, 2011.
2. Applications may be submitted by fax, mail, email (as a PDF)\*, or delivery service to:

California Bar Foundation  
180 Howard Street  
San Francisco, CA 94105-1639  
Attention: Program Director  
Fax: 415-856-0788  
[iquillory@calbarfoundation.org](mailto:iquillory@calbarfoundation.org)

3. Applications postmarked by the Application Deadline but not received in full by the Application Deadline will **not** be accepted.
4. An electronic version of the Grant Application is available at [www.calbarfoundation.org](http://www.calbarfoundation.org).

*\* If submitting the document via email as a pdf, the entire application should be submitted as one pdf. The only exception is that any financial supplemental document that is over 20 pages should be submitted as a separate pdf.*

## 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 or evidence of tax exempt status, and accommodate reasonable site visits by the Foundation during the year in which grant funds are used by Applicant.

**Questions?** Contact Jasmine Guillory, Program Director, at 415-856-0780, ext. 302 or [iquillory@calbarfoundation.org](mailto:iquillory@calbarfoundation.org).



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### GRANT APPLICATION COVER SHEET

#### Applicant Information

Applicant:	
Federal EIN:	
Tax Status:	<input type="checkbox"/> 501(c) ____ <input type="checkbox"/> Other: _____
Address:	
City, State, Zip	
Phone:	
Fax:	
Website:	
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:	
Is this a multi-year request?	<input type="checkbox"/> No <input type="checkbox"/> Yes
Is this a collaboration? If yes, list the other organization(s):	<input type="checkbox"/> No <input type="checkbox"/> Yes
Which priority area does this project support? (Check either or both)	<input type="checkbox"/> Rural <input type="checkbox"/> Diversity

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
  - Signature Page
  - Responses to “Application Information and Project Description” and “Project Budget”
  - “Financial Attachments” and “Organizational Attachments” in the order set forth below (these documents do not need to be submitted by the Courts)

#### 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:***

- Roster of Board of Directors, identifying the officers.

# 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. Describe how the Project will be implemented, including listing which staff members will be involved, and the general timeline for implementation of the Project.
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. If the Project will continue beyond the 2012 calendar year, describe how the Project will be funded in the future.

## Project Budget

Provide a detailed budget for the Project for each of the following items. Identify which of the Project costs are already accounted for in Applicant's annual budget by marking such costs with an asterisk (\*).

Project Staff	\$
Materials/Supplies	\$
Space	\$
Travel	\$
Technology	\$
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