

OKLAHOMA BAR FOUNDATION

2012 Out-of-Cycle Grant Application Instructions and Requirements

Please carefully review the 2012 Grant Application Instructions and Requirements before completing your grant application packet. Thank you.



Lawyers Transforming Lives

Our Mission: To promote justice, fund critical legal services, and advance public awareness of the law.



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 heart of the Oklahoma Bar, and all licensed lawyers in Oklahoma are members of the Foundation. OBF works 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, *Cy Press*, and IOLTA.

The purposes of OBF grant funding are:

- 1) To provide delivery of civil legal services to the poor and elderly;
- 2) To promote quality education of the law and legal issues;
- 3) 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.

Out of Cycle Grants

The Oklahoma Bar Foundation may make out-of-cycle grant awards on a periodic basis throughout the calendar year not to exceed \$2,000 per grantee. Awards are made on an emergency basis. OBF will consider such emergency requests when all of the following criteria are satisfied:

- The need is highly meritorious;
- The request fits within the charitable purposes of the OBF;
- The emergency need for the funds could not have reasonably been anticipated in the previous regular grant cycle;
- The situation requires a decision for funding before the next regular grant cycle;
- Other funds are not obtainable from other avenues to meet the emergency needs.

Exempt Status

Applicants must be organized as a non-profit organization recognized by the Internal Revenue Service as a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code, or as an organization that will provide a 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. OBF does not fund political activities or organizations. Funds are to be used for exclusively public purposes.

Important Out-of-Cycle Application Submission Information

A printed letter requesting out-of-cycle funds may be sent to the attention of the Director of the Oklahoma Bar Foundation containing the following required information and may include other supplemental attachments. **Requests must be received not less than 20 days before the next regularly scheduled OBF Board of Trustee Meeting to allow sufficient time for review.** The request should include:

- A. The legal name of the organization (must be the same as that shown on the organization's IRS tax-exempt determination letter) with a brief description of the organization and mission statement.



- B. A copy of your non-profit organization IRS tax-exempt determination letter.
- C. Year the organization began.
- D. Organization's contact name and title.
- E. Program or project name, if different from the organization name, and the year and month the program or project began.
- F. A brief definition of the program or project, with a description of need for funds being requested and intention for use of the funds. Include the geographic area served and a projection of the number of people directly impacted by your program or project. Does this request fall under the provision of free legal services, public law-related education, other administration of justice programs for exclusively public purposes and please explain specifically how.
- G. Financial budget information using the attached OBF Budget Form. Include the total projected cost of the Program or Project, all budget revenue sources, and the amount of grant funding requested from OBF; include other grant funding sources that your organization hopes to receive funding from and the status of those requests.
- H. Explanation as to why funding for the program or project cannot wait until the next regular OBF grant cycle.
- I. Information regarding the potential of receiving funding from another source, including but not limited to challenge grants.

A sample of the required "Out-of-Cycle Grant Report Form" is attached for your review, should your organization receive funding. Your organization will also be required to complete and sign an OBF Grant Agreement. Please see Public Recognition requirements below.

Please mail or deliver twelve (12) sets of the request letter and attachments to:

Oklahoma Bar Foundation
Attn: Nancy Norsworthy
P O Box 53036
Oklahoma City OK 73152-3036

Street Delivery:
Oklahoma Bar Foundation
Attn: Nancy Norsworthy
1901 North Lincoln Blvd
Oklahoma City OK 73105-4901

Public Recognition of the Oklahoma Bar Foundation

Grant recipients are required as a condition of OBF funding to recognize the Oklahoma Bar Foundation in written materials, during program presentations, on your Website and various forms of media, and other venues. Samples of recognition should be provided to the Foundation.

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



Financial Information and Budget Sheet

Program: _____

	Actual Figures <i>(last year)</i>	Current Budget <i>(this year)</i>	Next Year Projected Budget <i>(next year)</i>
Beginning Fund Balance	\$ _____	\$ _____	\$ _____
ALL REVENUE SOURCES			
OBF Grant Award	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total Revenue	\$ _____	\$ _____	\$ _____
In-Kind Donations	_____	_____	_____
In-Kind Services	_____	_____	_____
TOTAL REVENUE			
(Including In-Kind)	\$ _____	\$ _____	\$ _____
ALL EXPENSES			
Salaries <i>(attach list of positions)</i>	_____	_____	_____
Benefits/Payroll Taxes	_____	_____	_____
Office Space	_____	_____	_____
Telephone	_____	_____	_____
Supplies	_____	_____	_____
Postage	_____	_____	_____
Equipment:*	_____	_____	_____
Rent/Lease	_____	_____	_____
Maintenance/Repair	_____	_____	_____
Depreciation Expense**	_____	_____	_____
Printing and Photocopying	_____	_____	_____
Service Charges	_____	_____	_____
Auditing	_____	_____	_____
Insurance	_____	_____	_____
Other Program/Project Expenses:	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total Expenses	\$ _____	\$ _____	\$ _____
In-Kind Donations	_____	_____	_____
In-Kind Services	_____	_____	_____
TOTAL EXPENSES			
(Including In-Kind)	\$ _____	\$ _____	\$ _____
GAIN/LOSS	\$ _____	\$ _____	\$ _____
Ending Fund Balance	\$ _____	\$ _____	\$ _____
Capital Purchases			\$ _____
To Be Made***			\$ _____

* Equipment Expense does not include capital purchases.

** Depreciation Expense should reflect the annual depreciation of equipment owned by the organization.

*** If you plan to use OBF funds for Capital Purchases, please describe & explain reason for purchase on separate sheet; attach 3 quotes.

ATTACH FINANCIAL STATEMENTS FOR THE TWO MOST RECENT YEARS.



OKLAHOMA BAR FOUNDATION GRANT REPORT FORM

This Report Form must be submitted by regular mail as a condition of Oklahoma Bar Foundation (OBF) grant funding. Failure to comply may result in your organization being required to repay grant funds to the Oklahoma Bar Foundation.

TO: Nancy Norsworthy, Executive Director
Oklahoma Bar Foundation
P O Box 53036
Oklahoma City OK 73152-3036
Phone: (405) 416-7070 or (800) 522-8065, Ext 7070
E-mail: nancyn@okbar.org

FROM: Your Contact
Name: _____
Organization: _____
Program/project funded: _____
Address: _____
City/State/Zip: _____
Contact Phone: _____
Contact E-mail Address: _____
Preparation Date: _____
Report Period Covered: _____
OBF Grant Period: 2012 OBF Out-of-Cycle Grant
Full Amount Granted: _____

BRIEF PROGRAM DESCRIPTION:

INTRODUCTORY STATEMENT:

TOTAL GRANT EXPENDITURE: _____

Expense Category

Expended Amount this Report Period

<i>Expense Category</i>	<i>Expended Amount this Report Period</i>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



PROGRAM/PROJECT HIGHLIGHTS:

STATISTICAL INFORMATION:

YOUR GOALS AND SUCCESSES:

PRO BONO EFFORT HIGHLIGHTS (volunteer efforts):

PROBLEMS YOU ENCOUNTERED:

PRESS RELEASE INFORMATION/NOTICES/CLIPPINGS/ACKNOWLEDGEMENTS OF OBF FUNDING:

ADDITIONAL INFORMATION: