



OKLAHOMA
BAR FOUNDATION
Law. Education. Justice.

***Bank of America Grant Application
Instructions and Requirements***



**OKLAHOMA BAR FOUNDATION
PO Box 53036
Oklahoma City, OK 73152**

**BANK OF AMERICA SETTLEMENT FUNDS
REQUEST FOR PROPOSAL**

TIMELINE:	Requests for Proposals Circulated:	January 24, 2017
	Requests for Proposal Responses Due:	March 7, 2017
	Grant Decisions Finalized:	May 15, 2017
	Initial Grant Funding Date:	June 1, 2017

I. BACKGROUND ON BANK OF AMERICA FUNDS

The settlement of litigation between the U.S. Department of Justice and certain Bank of America entities involving the sale of mortgage-backed securities has resulted in a nationwide distribution of surplus funds to various organizations, including the Oklahoma Bar Foundation (“OBF”). Under the terms of the Settlement Agreement, the settlement funds received by the OBF are to be used only for grants related to foreclosure prevention programs and/or community redevelopment programs. The funds cannot be used for general purpose grants. The Oklahoma Bar Foundation has received the portion of the settlement proceeds allocated to it, and is now in the position to receive and consider applications for grants of one-year terms to support programs that meet the foreclosure prevention and/or community redevelopment requirements of the Settlement Agreement.

It is anticipated that the OBF will grant a portion of the funds during an initial grant funding period, and will retain a portion of the funds to expand or continue successful programs in the future, with an eye toward programs that can provide continued and sustained benefits across the State. The Oklahoma Bar Foundation has full discretion to award or hold funding to distribute later for any reason.

II. GENERAL PROPOSAL REQUIREMENTS

- Proof of status as a not-for-profit or educational/charitable entity under the United States Internal Revenue Code
- Applicant’s Organizational Structure and Purpose
 - Applicant’s mission and goals
 - Applicant’s current programs or activities
 - Board of Directors
 - Number of Full-time Paid Staff and Part-time Paid Staff

- Number of Volunteers
- Receipt of Prior Funding from OBF
- Written general description of the proposed grant Program that includes:
 - Name of the Program
 - Nature of Program
 - Mortgage Foreclosure Prevention
 - Community Redevelopment
 - Statement of Intent of Program
 - Statement of Need for Program
 - Statement of Goals for Program
 - Community Assistance
 - Education
 - Job Creation
 - Sustainability
 - Expansion
 If expansion of existing Program, description of:
 - ◆ History of Program
 - ◆ Past successful activities of Program
- Budget for Program
- Outreach and Promotion of Program to Target Population
- Timeline for Program Completion
- Criteria for Determining Program Results and Success

III. GENERAL CRITERIA FOR FUNDING CONSIDERATION

- Demonstrated Need within the Target Community
- Impact of Proposed Services
- Geographic Area Served
- Specialty Population of Individuals Served, if applicable
- Plan for Ensuring Target Population's Knowledge of Program
- Timeline for Achievement of Goals and Objectives
- Plan for Partnerships and Collaborations on Program Goals
- Plan for Sustainability of Program and Continuing Benefits
- Plan for Supplemental or Matching Funds from Other Sources to Support Program
- Plan for Determining Program Results and Success
- Organization Stability, Track Record, and Fiscal Responsibility
- Non-Duplication of Existing Services

IV. GUIDELINES

A. MORTGAGE FORECLOSURE PREVENTION PROGRAMS

Proposals that are centered on Mortgage Foreclosure Prevention should describe how grant funds will be used to assist low-income individuals at risk of losing their homes, in the context of the specific circumstances currently faced by them and/or their communities, including legal services to address foreclosure prevention or foreclosure-related issues, such as:

- Prevent foreclosure proceedings
- Prevent eviction from housing in foreclosure proceedings
- Deceptive lending practices that put homesteads at risk
- Property tax disputes on homesteads
- Bankruptcy homestead exemption issues
- Loan modification issues
- Financial counseling and assistance related to unemployment, child support, supplemental government assistance and other issues that create risk for home loss.

B. COMMUNITY REDEVELOPMENT PROGRAMS

Programs that are centered on Community Redevelopment must address legal and social services directed to a specific need in a target community. Grant funds can be used to promote economic development by support of programs and provision of services that help revitalize or stabilize low and moderate-income communities. These may include support of projects with a legal nexus and that are typically considered community development, such as senior centers, job training centers or affordable housing programs, or that address problems facing communities such as substandard housing, language barriers, unemployment and poverty, or other applicable projects. Proposals should describe:

- How program development will be used to establish social and economic change within a defined target population or community
- How legal assistance is a component of reaching the goals of the Program
- Anticipated assistance by the target community in addressing barriers to development within the designated area of need
- Goals for development of the Program, including components of how the Program can be sustained
- Potential for additional fund providers or matching grants for Program
- Potential for collaborating opportunities with other programs

- Potential collaboration with local and state governments

V. **DATA COLLECTION AND PROGRAM EVALUATION REQUIREMENTS**

By submitting a grant application, an applicant agrees to collect and report the data described below, through submission of mid-year and end of year grant reports. The OBF requires that grantees collect and report the following specific data, and may require additional information from individual grantees on a case by case basis:

A. **Mortgage Foreclosure Prevention Program**

- Evaluation of services and use of funds provided, including:
 - Number and specialty population of individuals served
 - Family
 - ◆ Traditional household or single head of household
 - ◆ Education level of head of household
 - ◆ Number of children per household
 - ◆ Number of elderly per household
 - Veterans
 - Elderly
 - Immigrants
 - Native Americans
 - Other specialty population
 - Additional or other benefits clients receive from assistance

Grantees must also provide at least one client story detailing how individuals, families and/or target communities were served by the foreclosure prevention services provided.

B. **Community Redevelopment Program**

- Evaluation of program and use of funds provided, including:
 - Number and specific population of individuals served:
 - Family
 - ◆ Traditional household or Single Head of Household
 - ◆ Education level of head of household
 - ◆ Number of children per household
 - ▲ Ages of children in household
 - ▲ Any special needs children
 - ◆ Number of elderly per household
 - Veterans
 - Elderly
 - Immigrants
 - Native Americans

- Other specialty population

Grantees must also provide at least one client story detailing how a non-profit was served by a community redevelopment program OR how target individuals and/or communities were positively impacted by a community development program and services provided.

VI. APPLICATION INSTRUCTIONS AND PROCESS INFORMATION

All application instructions and forms are available at www.okbarfoundation.org. Applications must arrive at the OBF no later than 5:00 pm on March 7, 2017. Applications may be mailed, hand-delivered or emailed to the addresses below. Early application submission is encouraged. Late applications will generally not be accepted, although such applications may be reviewed under special circumstances. If application instructions are not followed exactly, your grant application will not be considered.

U.S. Mail
Oklahoma Bar Foundation
Attn: Grants Program
PO Box 53036
Oklahoma City, OK
73152-3036

Hand-Delivery
Oklahoma Bar Foundation
1901 N. Lincoln Blvd.
Oklahoma City, OK
73105-4901

Email
foundation@okbar.org

All grant request applications **must** include the first three components listed below (Parts I, II, and III) to be considered, and comply with any instructions written on the forms. Applications must be fully completed and signed.

NOTE: Application instructions and forms are available at www.okbarfoundation.org. If submitting by email, please complete the PDF fillable form.

The OBF Bank of America Task Force will review applications and make recommendations to the OBF Board of Trustees. An applicant may be asked to make a brief appearance and presentation before the Task Force. Applicants will receive written notification regarding their applications on or after May 15, 2017.

Prior to the release of any grant funds, successful applicants must sign a contractual grant agreement, which may include individual program funding conditions.

Part I. Proposal Description Form

The following information for the Proposal Description Form must be submitted on the form available on the OBF website.

- A. Executive Summary
- B. Applicant Organization Information
- C. Program Proposal Description

Part II. Program Budget Form

Applicants must complete and submit the Budget Form available on the OBF website.

Part III. Required Submission Materials to Attach

Applicants must submit the following materials with the grant application:

- A. Most recent Form 990 or other Tax Report Form
- B. Current Board-Approved Organization Budget

Part IV. Additional Information for Consideration (Optional)

VII. QUESTIONS

Please contact OBF Executive Director Renée DeMoss with any questions at 405-416-7040 or via email at reneed@okbar.org. Applicants should not contact members of the OBF Board of Trustees or Task Force members unless authorized to do so by the OBF Executive Director.