



**OKLAHOMA**  
**BAR FOUNDATION**  
**Law. Education. Justice.**

***Grant Application***  
***Instructions and Requirements***

## General Information

The Oklahoma Bar Foundation (OBF) was founded in 1946 to accomplish the charitable purposes of lawyers from all across Oklahoma. It is the third oldest state bar foundation in the Nation and serves as the charitable arm of the Oklahoma legal community. OBF supports work on behalf of Oklahoma's most vulnerable persons through the generous charitable donations of attorneys throughout the state.

The purposes of OBF grant funding are:

- To provide support for the delivery of civil legal services to the poor and elderly;
- To promote quality education in the law and on legal issues;
- To improve and promote the administration of justice and law-related programs for the benefit of the public.

## Important Application Submission Information

OBF grants are awarded on an annual basis. Applicants are to submit **1 original and 14 printed copies** of the OBF Grant Application not later than **5:00 pm, on Friday, June 24, 2016** to receive consideration. Applications must be fully completed and signed. Early application submission is encouraged.

**Oklahoma Bar Foundation**  
**Attn: Grants Program**  
**PO Box 53036**  
**Oklahoma City OK 73152-3036**

**Oklahoma Bar Foundation**  
**1901 N. Lincoln Blvd.**  
**Oklahoma City OK 73105-4901**

All applications **must be postmarked or delivered no later than 5:00 pm, on Friday, July 1, 2016 to receive consideration.** Applications may be delivered only between the hours of 8:30 a.m. and 5:00 p.m., Monday through Friday. **Applications will not be accepted via e-mail or fax. Deliveries will not be accepted after 5:00 pm.**

The OBF Grants and Awards Committee reviews Grant Applications and makes recommendations to the Board of Trustees. An applicant may be asked to make a brief appearance and presentation before the Grants & Awards Committee. Applicants will receive written notification regarding disposition of their application in September.

Questions about application preparation should be directed to the OBF Office at (405) 416-7070 or by e-mail to [foundation@okbar.org](mailto:foundation@okbar.org). Either PDF fill-in the blank forms or a Microsoft Word version of the complete Application Packet (2 parts – 1) *Instructions* and 2) *Forms*) are available on the OBF website at <http://www.okbarfoundation.org>.

## Tax Exemption Status

Applicants must be organized as a tax-exempt charitable organization under Section 501(c)(3) of the Internal Revenue Code, or in some instances, as an organization that will provide an exclusively charitable public service that would qualify as tax-exempt under the IRS code. A copy of the applicant's tax determination letter and most recent IRS Form 990 is required as a portion of the application packet.

## Application Guidelines

- OBF grants provide funding for a period of one year
- Grant awards are generally made in one lump sum payment to the recipient.
- Grant recipients will be required, as a condition of funding, to submit one mid-year and one final written report on the progress of the funded project. The final written report is due within 30 days of

completion of the project. A sample "OBF Grant Report Form" is attached for informational purposes.

- Grant recipients may be asked to participate in OBF presentations before bar and other organizations. Site visits may be conducted by OBF. Grant recipients are required to annually provide not less than two (2) narrative stories about your program or project successes.
- Please update all print and online materials to our new logo as seen on this document.

## Grant Priorities

The following priorities will be considered in making grants, not necessarily in the order listed:

- The track record of the applicant including, but not limited to, fiscal responsibility and program stability.
- Other funding sources or potential funding sources that sustain the program.
- Development and expansion of pro bono services.
- Special needs of the applicant.
- The potential for matching funds from other sources.
- Benefits that will be derived from the project or program.
- Non-duplication of existing services.

## Technical Information and Instructions

The Grant Application should contain the following information and be arranged in the following order:

**Cover Sheet:** Complete the one-page Cover Sheet. No other materials should be placed before the Cover Sheet. Please limit the Cover Sheet to one page.

The "Brief summary of grant request" should not exceed the allocated area. The main descriptive body of your request should be contained within the body of the application. The bottom portion of the Cover Sheet is for OBF use.

- A) **Purpose:** Within the main descriptive body of your application, provide a description of your organization, brief history and purposes.
- B) **Program/ Project Overview:** Please provide a brief program or project narrative that explains the purpose and need for your program or project, and the geographic area to be served.

When describing your organization's community involvement and support, identify other organizations or projects that provide the same or similar services, and describe any cooperative relations between your organizations. Describe volunteer activities and pro bono utilization efforts, when applicable.

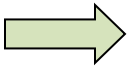
- C) **Please provide the following information within the body of your application**

- Staffing information (Please attach an itemized list of positions and salaries)
- Community(s)/population served.
- Expected number and types of clients served.
- Overall community need for such services.

- D) **Your Program or Project Evaluation:**

- Please provide information on how you plan to measure your success toward achieving the goals outlined in your proposal.

- E) **Additional Program Information:**



- Include a list of your Board of Directors and Officers; identify and describe their professional or community involvement background:
  - Please note the percentage of Board members that have made a financial contribution to your organization in the past year.
  - Any compensation, financial and other, any Board member may have received from your organization within the past 3 years.
- **Impact:** Please explain the impact on your program or project if the OBF was unable to fund your program.
- **Other Activities:** Does your organization engage in any direct or indirect political activities? If so, please provide an explanation.
- **Tax Status:** Provide a copy of your most recent IRS tax-exempt determination letter. If you do not have an IRS tax-exempt determination letter, please provide an explanation.
- **Tax Forms:** Provide a copy of your last IRS Form 990 or other appropriate tax form.
- **Audited Financials:** Provide a copy of your last audited financial report.
- If you have become aware of any material diversion of the organization's assets please provide an explanation.
- **Financial Information & Budget Sheet:** Fully complete the Financial Information & Budget Sheet and also attach a Budget Narrative explaining your budget figures.

The **Budget Narrative** should include, but is not limited to the following:

- The total amount of your grant request.
- The total of all other income sources.
- An itemized listing of staffing positions and salary.
- Include general and operational expenses as well as any program specific income and/or expenses.
- A description of any donated goods and/or services-