

STATEMENT OF NEED

Name of Organization/Applicant: _____

Project Name (if applicable): _____

In no more than one page, provide a summary of your application that identifies the major goals your organization intends to accomplish within the grant period. Your summary should also address why your proposed project should be of interest to the SC Bar Foundation within the Foundation's scope of purpose for IOLTA grants (*see Grant Policy #1*).

If you received funding in FY 2010, please make a brief statement on (1) your organization's progress on seeking outside sources of funding and (2) working with other IOLTA grantees throughout the past grant cycle.

NARRATIVE

INSTRUCTIONS: Answer the following questions in narrative format. Responses should be provided in the order of questions presented.

1. PROGRAM DESCRIPTION.

a. GOALS, PROJECT ACTIVITIES and OUTCOMES.

List the major goals you plan to accomplish during the grant period. For each goal, you should identify the project activity or activities that will help you accomplish that goal. For each goal/project activity, you should also list any anticipated outcomes including, but not limited to numbers of people/clients to be reached/quantitative impact of your services. *This section of your application should help you determine financial needs.*

b. PROGRAM PARTICIPANTS.

- What standards will you use to determine participant eligibility?
- How will you assess their problems and assign participants to attorneys or other staff?
- If you have a program that addresses participants in difficult service situations, e.g. remote areas or homebound clients, describe how you will reach these individuals.
- How will prospective participants be informed about the program's services?
- How will you involve program participants in the planning, development and implementation of activities?
- How can program participants express complaints or dissatisfaction with services, and how are such complaints resolved? Attach a 1 to 2-page **summary** of the results from any participant satisfaction surveys completed within the past twelve months as *attachment A*, if applicable.

c. SERVICE PROVIDERS.

- How is legal work supervised and how is the quality of such legal work assured?
- What training and back-up support in poverty law or other relevant substantive areas will your providers have?
- How will you evaluate the quality of service provided?

2. COLLABORATION.

- Identify relevant organizations (for example, other legal services providers, private bar organizations or community-based organizations) which will actively participate in this program or project, and provide a brief overview of their roles in carrying out the purposes of this grant.
- Describe arrangements with other legal service providers in your area to avoid duplication of effort.
- Highlight involvement of the private bar.
- Attach any memoranda of agreement from collaborative partners for proposed projects as *attachment B*, if necessary. Documentation is only required where

there is significant collaboration. Simple letters of support for the organization should not be included.

- Describe the involvement of volunteers, if applicable.

3. ORGANIZATION DESCRIPTION.

a. STRATEGIC PLAN/PROGRAM PRIORITIES.

- What service priorities do you have? How did you establish them and how do you propose to meet them?
- What impact will they have on your community's demonstrated need? A copy of the organization's strategic plan should be submitted as *attachment C*. In addition, a summary of the results of any needs assessment surveys completed in the past twelve months as *attachment D*, if applicable.

b. GOVERNANCE.

- State the names and experience of your principal staff persons. Please describe their major responsibilities.
- As *attachment E*, please provide an organizational chart.
- As *attachment F* please state the names of the organization's governing body that includes addresses, terms of officers and method of selection.

4. DATA COLLECTION

- If you received IOLTA funding for the 2010 cycle (July 2009 through June 2010), you may proceed to section 5. **However, please note that the Foundation may follow up with additional requests regarding data collection as a part of the IOLTA grant application process.**
- All other applicants please submit the data as requested below. Please note that the Foundation may follow up with additional questions regarding data collection as a part of the IOLTA grant application process.

Civil Legal Services applicants: Provide full data regarding your caseloads by category for the period January through December 2009. Include definitions of caseload categories, e.g., telephone contacts, full intake and review, brief counseling, referrals to other agencies, litigation, appeals, case referral and placement etc. Compare and contrast this data with your caseload in the period January to December 2008.

All other applicants: Provide full data regarding the outcomes of the services you provided during the period January to December 2009, including descriptions of the services provided, referrals, case placement and the number of people served.

- 5. **OTHER COMMENTS.** In 100 words or less, you may add any other comments not previously addressed.

ATTACHMENTS. Attachments A through F are described in the narrative. Attachments G and H are described below. Please do not include any other attachments to the grant application.

Attachment A	Participant satisfaction survey results (<i>see 1b</i>)
Attachment B	Collaboration letters (<i>see 2</i>)
Attachment C	Strategic plan (<i>see 3a</i>)
Attachment D	Needs assessment survey results (<i>see 3a</i>)
Attachment E	Organizational chart (<i>see 3b</i>)
Attachment F	Governing body (<i>see 3b</i>)
Attachment G	Audit mechanism: Attach a copy of your most recent audit report or a recent financial statement that has been approved by the organization's governing body. If you received funding in the 2010 cycle, please check with Jenny Brown at jenny.brown@sbar.org or 803-765-0517 to see if your audit submission is up to date.
Attachment H	Exempt status: Attach your IRS determination letter. <i>If you received an IOLTA grant after 2004, we have this on file and you do need to submit again unless your status has been updated for any reason.</i>