



## Texas Bar Foundation

www.txbf.org

504 Lavaca, Suite 1005

Austin TX 78701

512/480-8000

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### ***Applying for a Grant from the Texas Bar Foundation***

The Texas Bar Foundation awards grants only to 501 (c) 3 charities serving the State of Texas, and, consequently, no grants are awarded to individuals. Bar Associations, though 501 (c) 6 organizations, are encouraged to apply for project support. Special instructions for entities affiliated with the State Bar of Texas are on page ii.

#### ***Deadlines***

(when the deadline falls on a weekend or US Post Office holiday, the deadline is 5 pm on the next business day)

**Fall submission deadline is August 10.**

**Spring submission deadline is January 15.**

Applications (1 original and 3 copies) must be in the Bar Foundation office by 5 o'clock p.m. on the day of the deadline. No electronic or facsimile applications are accepted.

#### ***Mission***

The Texas Bar Foundation solicits charitable contributions and provides funding to enhance the rule of law and the system of justice in Texas, especially for programs that relate to the administration of justice; ethics in the legal profession; legal assistance for the needy; the encouragement of legal research, publications and forums; and the education of the public.

#### ***Preferred Activities***

*The Texas Bar Foundation prefers projects that:*

- Have a statewide impact
- Encourage and promote legal assistance to poor and disadvantaged people
- Encourage pro bono legal work
- Help members of the public understand their rights and responsibilities under the law
- Are new or innovative approaches that require 'seed money' to launch
- Enhance the ethical and professional practice of law
- Strengthen the court system or the administration of justice
- Produce legal research, publications, and forums

#### ***Disfavored or Excluded Activities***

*The Texas Bar Foundation does not favor grant awards for:*

- Projects outside the State of Texas
- Propaganda, lobbying activities, or the election of public officials
- Fund raising benefits or mass appeal solicitations
- Additions to endowments
- Multi-year commitments or repeat grants to the same project
- Continuing legal education programs, unless they are experimental or not self-supporting
- Operating expenses, unless used exclusively for a project

## Texas Bar Foundation

### ***Instructions for Completing a Grant Application***

- ✓ Submit only one application per fiscal year (June 1 to May 31).
- ✓ Send one original and three copies of the application (total of 4 items)
- ✓ Do not use spiral binding, folders, or special covers
- ✓ Answer every question in the order it appears on the application. If the question is Not Applicable, use NA
- ✓ Send a copy of the Tax Exempt Determination Letter from the U. S. Internal Revenue Service.
- ✓ Do not send information regarding exemption from Texas state sales tax
- ✓ Send audited "Statement of Activities" and "Statement of Financial Position"
- ✓ Send a list of the board members with telephone numbers and addresses
- ✓ Send a list of staff or organizational chart with staff names

### ***Conditions of Texas Bar Foundation grants***

1. The Texas Bar Foundation reserves the property rights, copyrights and all other rights of reproduction with respect to any intellectual property for which service is provided as a condition of this grant.
2. Grant awards must be used strictly in accordance with the proposal and budget submitted in writing to the Foundation. A grantee must petition the board for permission to make any changes or alternate uses of grant funds.
3. A letter agreement accepting the terms and conditions of the grant must be signed and returned to the Foundation within twelve months or the award will be rescinded.
4. Semi-annual progress and financial reports are required.
5. A final report that includes a description of the project's benefit to the community is required. The final report should state the original goals and progress made toward the goal.
6. Bar Foundation funds must be used within 12 months of the date of the award.
7. The Executive Director may grant a six month extension if there has been a good-faith effort to complete the project.

### ***Special Instructions for State Bar of Texas and Texas Young Lawyers Association***

1. The State Bar of Texas Appeals-Grant Review Committee first must clear any proposal before it may be submitted to the Foundation
2. Financial statements and operating budgets are not required
3. Evidence of 501 (c) 3 not required

*Once the Foundation receives an application, the application becomes the property of the Foundation. Information provided in an application may be made available to other Foundations, funding sources, and organizations. In addition, the applicant authorizes the Texas Bar Foundation to communicate with other foundations, funding sources, and organizations to obtain information and status reports on other funding requests the applicant has submitted.*

**Texas Bar Foundation**  
**Grant Application**

**Checklist of Required Contents**

**send 4 each (1 original and 3 copies) of all required materials**

- Completed Application Form.
- Copy of Internal Revenue Service Tax Exempt Determination Letter
- Statement of Financial Position (balance sheet), from audit
- Statement of Activities (actual revenue and actual expense for a full year), from audit
- List of Board members with addresses, telephone numbers
- List of Staff of the Organization or organizational chart with staff names

**Optional Contents**

**send 4 each of any optional materials**

- Cover Letter Describing the Project (2 page maximum)
- Newspaper clippings about the organization or project
- Brochures or other printed materials

**Forward to:**

Texas Bar Foundation  
504 Lavaca, Suite 1005  
Austin, TX 78701

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## Grant Application

Deadline for Fall Submission: Received by August 10 at 5 o'clock p.m.  
Deadline for Spring Submission: Received by January 15 at 5 o'clock p.m.

DATE:

PROJECT TITLE *(does not include organization's name)*:

AMOUNT REQUESTED:

ORGANIZATION:

WEBSITE ADDRESS:

U.S. INTERNAL REVENUE SERVICE TAX IDENTIFICATION NUMBER:

**(Copy of Internal Revenue Service Tax Exempt Determination letter must be attached)**

INDIVIDUAL TO CONTACT REGARDING THIS APPLICATION:

PHONE NUMBER:

EMAIL ADDRESS

FAX NUMBER:

ADDRESS:

PURPOSE/MISSION OF THE ORGANIZATION:

BRIEF DESCRIPTION OF THE PROJECT (INCLUDES THE GOAL AND POTENTIAL BENEFIT TO THE COMMUNITY):

LIST PREVIOUS APPLICATIONS TO THE TEXAS BAR FOUNDATION:

Project Title	Year	Amount Awarded	Reported on time y/n

Has a previous application been for the same or a substantially similar project?

If yes, describe.

Every six months for the duration of a grant, a grantee must submit a progress report and financial information to the Foundation. Who will be the person responsible for these reports? Is this person aware of this responsibility?

**Project Description**

1. Indicate which element(s) of the Foundation's mission this project will address:  
Fosters legal services to the indigent or to victims \_\_\_\_  
Educates the public about their rights and responsibilities under the law \_\_\_\_  
Enhances the administration of justice \_\_\_\_  
Encourages legal research, publications or forums to disseminate information \_\_\_\_  
Strengthens the legal profession by improving the practice of law \_\_\_\_
2. The Texas Bar Foundation requires that any organization receiving a grant must give credit to the Bar Foundation. Describe how credit or recognition will be given.
3. Is this project new or is it a continuing project?
4. What other organizations in Texas or your area are providing similar service, or are working to solve similar problem?
5. If this is a new project, will it continue after all Texas Bar Foundation funds are expended?
6. If this is a continuation or expansion of an existing project, how long has the project existed?
7. How many participants or beneficiaries will this project serve? \_\_\_\_\_  
What is the cost per beneficiary? \_\_\_\_\_
8. This project targets the following audience(s): School age children \_\_\_\_ College students \_\_\_\_  
Adults \_\_\_\_ Elderly \_\_\_\_ Professionals \_\_\_\_ Judiciary \_\_\_\_ General community \_\_\_\_
9. Is a particular socioeconomic group targeted by the project? Describe
10. How will the beneficiaries of the project be selected?
11. Does this project have statewide impact?
12. If this is not a statewide project, specify by name the counties that will benefit (if more than 10 counties will benefit, name the ten counties most directly impacted).
13. Describe how this organization plans to accomplish the project.
14. Describe how this organization will staff the project.

**Project Funding**

15. List all previous expenditures for this project.
  
16. Identify by name and address all other sources of funding in hand for this project. Indicate the amount of funding currently available.
  
17. If additional funding is being sought, please describe the prospective funding sources and amounts.
  
18. If the Texas Bar Foundation does not award this grant, how will this project be funded?
  
19. If the Texas Bar Foundation does award this grant, how will the organization continue the project beyond this funding cycle? Who will provide funding?
  
20. This application represents what % of the total budget of the organization? \_\_\_\_\_ % what % of the total budget of this Project? \_\_\_\_\_ %

**Project Budget**

**INCOME**

SOURCES FOR THIS PROJECT

List all other funding sources and amounts

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Amount  
of Other Funding

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

Subtotal All <u>Other</u> Funding Sources	\$ _____
<b>Texas Bar Foundation Funding</b>	\$ _____
<b><u>Total Income</u></b>	<b><u>\$ _____</u></b>

**EXPENDITURES**

REQUIRED TO COMPLETE THIS PROJECT

Supplies (Specify)

Video/audio tapes + duplication

Postage

Printing/copy costs

Paper, office supplies

\_\_\_\_\_

Will pay from  
Bar Fdn Funds

Will pay from  
Other Sources

Total

\$ _____	\$ _____	\$ _____
\$ _____	\$ _____	\$ _____
\$ _____	\$ _____	\$ _____
\$ _____	\$ _____	\$ _____
\$ _____	\$ _____	\$ _____

<b>Subtotal Supplies</b>	<b>\$ _____</b>	<b>\$ _____</b>
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**Project Budget (con'd)**

<u>EXPENDITURES</u> REQUIRED TO COMPLETE THIS PROJECT (CON'D)	Will pay from Bar Fdn Funds	Will pay from Other Sources	Total
Personnel Costs (Specify)			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
Transportation			
_____	\$ _____	\$ _____	\$ _____
Staff Training (Specify)			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
Stipends for students (Specify)			
_____	\$ _____	\$ _____	\$ _____
<b>Subtotal Personnel, Transp., Training, Stipends</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
Equipment/Software (Specify)			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
<b>Subtotal Equipment/Software</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
Publicity/Advertising (Specify)			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
<b>Subtotal Publicity/Advertising</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
Other (Specify)			
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
<b>Subtotal Other</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b><u>Total Expenditures</u></b>	<b>\$ _____</b>	<b>_____</b>	<b>_____</b>

**Forward to:**

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