

MICHIGAN STATE BAR FOUNDATION



COMBINED FORMS PACKAGE GRANT APPLICATION AND GRANT ANNUAL REPORT

INSTRUCTIONS

A: Application and GAR Content Instructions

1. Application and GAR General Instructions
2. Client Service and Financial Definitions

B: Electronic Submission Instructions

1. Electronic Files

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Michigan State Bar Foundation

Combined Forms Package *Civil Legal Services to the Poor*

Grant Application and Grant Report Forms for the 2007 Grant Report

Instructions

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Part A.1. – Application and GAR General Instructions

****Important: Please read before completing the Application or Grant Annual Report****

INSTRUCTIONS: See also instructions in the forms themselves as well as in this booklet.

The instructions in this booklet are generally targeted at the technical aspects of the Application and GAR on such as statistics, finances and electronic submission. There are also important instructions throughout the Application and GAR forms, both those requiring numerical responses and those requiring narrative answers. Please also read those carefully before completing the forms. Often, the examples and explanations provided on the left side of the page are important guidance for the factors that should be built into a good response to the question. In your answers, try to address all those factors.

FORMS

You are required to submit completed 2007 Grant Report forms by April 30, 2008.

Please note: All IOLTA grantees and Filing Fees contractors must answer all questions. Attachments in lieu of answers will not be accepted except where indicated.

Electronic Submission: This report must be completed electronically using a full version Adobe Acrobat Software 7.0 or 8.0 (not just Acrobat Reader) and Microsoft Excel Software. Please enter information in the Acrobat forms at each field by typing in your response or by editing the existing response from a previous year. You can TAB (forward) or SHIFT-TAB (backward) between fields and scroll between pages. Please spell-check each form (<F7> or <Edit>, <Check Spelling>, <In Comments, Fields, and Editable Text>).

The space limitations will be apparent in the electronic form. Please stay within these limitations if possible. You will not be able to print out the information exceeding the space limitation though it will remain in the electronic answer. The Foundation will print hard copies of answers exceeding space limitations for you upon request.

You are required to submit a disk as well as one hard copy. You may file your forms by e-mail if you wish. Call Rick Winder at 800-968-6723 with questions.

ATTACHMENTS

You are required to submit the most current version of the documents on Page 2 of Part I of the Application and GAR forms unless you have submitted them previously.

Part A. 2. - Client Service Definitions

Client Service Report

Use Part II to describe the services provided or expected to be provided to clients 1) directly by the legal services program as well as 2) through private attorney involvement. The Staff table includes STAFF ONLY cases; these totals SHOULD NOT incorporate PAI cases, but SHOULD include Hotline cases. Include in the Hotline table the cases included in the Staff table which were handled through the Hotline. Report all PAI cases on the separate table for PAI cases.

The forms requesting program Staff and PAI projected cases and year-end open cases are identical to LSC forms, so you can just enter the summary data from the LSC forms into the Application.

Fill out this section if your program provides civil legal representation directly to low income clients and/or operates a program for referring cases to private attorneys for handling at no cost to clients. For purposes of statistical reporting, the Michigan State Bar Foundation uses the same definition of "case" as the Legal Services Corporation.

You must use this same definition for reporting cases which is as follows:

A "case" is the provision of permissible legal assistance to an eligible client with a legal problem, or set of closely related legal problems. Cases are services in which assistance is provided to one or more specific eligible clients. Examples include representation in litigation, administrative proceedings and negotiations, and such actions as advice, providing brief services and transactional assistance, and assistance with individual PAI cases.

If completing the client service forms you must use the definitions of CSR terms and case types provided herein. The definition of "matter" is as follows:

A "matter" is a legal service provided to the low-income community other than services provided as part of the work performed on accepted "cases" (Services such as legal information, advice or other assistance provided to an eligible "client" in connection with a "case" would not be reported as "matters.") Matters are actions that contribute to the overall delivery of services that do not involve direct legal advice to, or legal representation of, one or more specific clients. Examples include: special project meetings about legal services to the community; community education events; pro se clinics; providing information about the availability of legal assistance; developing informational materials; training; continuing legal education; general supervision of applicant services; the preparation and dissemination of desk manuals; PAI recruitment; and other direct or indirect applicant services that are not actions taken in cases.

A "hotline" is a telephone intake system with dedicated (paid and/or volunteer) staff and systems that provide advice, brief services and referrals, allowing eligible callers to speak directly to a legal worker who can analyze the

caller's problem and provide legal advice, information, referral and brief services as appropriate at the time of the call or with a return call.

If you feel that narrative explanation would help us better interpret the case statistics you provide because of circumstances unique to your program, explain in the Comments field.

If the information you collect to report case service statistics is different than that required in the Grant Application, you must contact Rick Winder at 1-800-968-6723 to determine whether alternate reporting will be permitted. Absent authorization from the Foundation, alternate statistical submissions are not permitted.

Supporting Activities are actions that are administrative in nature and are not cases or matters. Such actions include fundraising and actions classified as "management and general" for accounting purposes. Examples of supporting activities include: fundraising; board meetings; staff breaks; general staff meeting; researching timekeeping systems; and staff evaluations.

Direct Legal Representation of Low Income People - List of Case Types

Consumer/Finance

Bankruptcy
Debt Relief
Collection
Contracts
Warranties
Credit Access
Energy
Loans
Public Utilities
Unfair Sales Practices
Other Consumer Finance

Education

Special Education
Suspension
Expulsion
Other Education

Employment

Job Discrimination
Wage Claims
Other Employment

Family

Adoption
Custody
Visitation
Divorce
Separation
Guardianship
Name Change
Paternal Rights Termination
Paternity
Domestic Abuse
Support
Other Family

Juvenile

Delinquency
Neglect and Abuse
Other Juvenile

Health

Medicaid
Medicare
Other Health

Housing

Federally Subsidized Housing
Other Public Housing
Home Ownership
Real Property
Landlord/Tenant
Other Housing

Income Maintenance

AFDC
Welfare
Black Lung
Food Stamps
Social Security
SSI
Unemployment Compensation
Veterans Benefits
Workers Compensation
Other Income Maintenance

Individual Rights

Immigration
Naturalization
Mental Health
Prisoner's Rights
Rights of the Disabled
Other Individual Rights

Miscellaneous

Incorporation
Dissolution
Native American Tribal Law
Licenses (Auto & Others)
Torts
Advance Directives
Wills and Estates
Other Miscellaneous

GLOSSARY OF CASE SERVICE TERMS

Case Definitions & Closure Categories

CSR Category A -- Counsel and Advice. A case closed as the result of the provision of advice to an eligible client in a case, e.g., the review of relevant information and the counseling of the client on action(s) to take to address a legal problem.

CSR Category B -- Brief Services (Other than Counsel and Advice). A case closed as a result of an action taken at or within a few days or weeks of intake on behalf of an eligible client, e.g., the preparing of a short letter, the making of a telephone call, or the preparation of a routine legal document such as a simple will.

CSR Category C -- Referred After Legal Assessment. A case closed in the course of providing assistance to an eligible client because the client is referred outside the program (e.g., to a social service agency or a non-LSC provider) because information in the case indicates that the program should not handle the case, or that the client would be better served by a referral outside the program.

CSR Category D -- Insufficient Merit to Proceed. A case closed after an applicant has been accepted as a client because new facts or circumstances arise or become apparent leading to the conclusion that there is an insufficient basis, in law or in fact, to pursue the case.

CSR Category E -- Client Withdrew or Did Not Return. A case closed because the client failed to return to the program during the course of representation and could not be contacted. This category also includes case closures where the client decides not to proceed with the case, e.g., a client in an eviction case decides to move out instead of proceeding with legal action.

CSR Category F -- Negotiated Settlement Without Litigation. A case closed through negotiation prior to initiation of court or administrative action.

CSR Category G -- Negotiated Settlement With Litigation. A case closed through negotiation during a court or administrative action, e.g., the resolution of a dispute after an action has been filed.

CSR Category H -- Administrative Agency Decision. A case closed as a result of an action taken by an administrative agency or body, e.g., a welfare department.

CSR Category I -- Court Decision. A case closed as a result of an action by a court.

CSR Category J -- Change in Eligibility Status. A case closed through discontinuance of representation of a client because the client no longer meets financial or other eligibility requirements due to new circumstances, e.g., a change in employment status or family income, incarceration, or a change in immigration status.

CSR Category K -- Other. A closed case that does not fit any of the preceding ten CSR case closure categories. Cases in which there is no opposing party, but in which

the services provided are too extensive to fit the brief service category, such as the preparation of a complex contract or a complex medical power of attorney, may be closed in this category. Cases which fit two or more CSR categories may not be closed in this category, but should be closed in the category which best reflects the level of service provided.

Other Definitions Related to Cases

Client Service includes all forms of advice, brief service and extended service to low-income clients in cases involving all types of legal problems.

Limited Service includes counsel, advice, brief service, referral after legal assessment, rejection for insufficient merit to proceed, client withdrawal, client failure to return and change in eligibility status.

Extended Service includes negotiation toward settlement (with or without litigation), administrative agency proceedings, litigation in court and other services beyond advice and brief service, including transactional services which do not involve a controversy, and thus are not "settled" or litigated. Transactional services include such assistance to clients as drafting complex legal documents, such as, contracts, wills, Advance Directives (simple legal documents fall under Brief Service), obtaining licenses or permits, purchasing or selling real estate and obtaining small business loans. For further information about CSR categories, please refer to the LSC CSR Handbook.

Branch Office: An office that is physically distinct from the central office and has a separate staff.

Client: A person (or group of persons) who is eligible for legal assistance and accepted for assistance through an intake system or other established program procedure for ensuring client eligibility. One client may generate one or more cases, as defined by subject matter.

Closed Case: A case in which the client's problems are resolved and the case is closed; or a case in which the client's problem is not resolved but it is determined that no further action will be taken on the case.

Closure Date: Date on which the program determines that no further action is to be taken on the case.

Group Clients: Two or more individuals other than spouses or parent and child are represented by the program in an effort to resolve a legal problem or set of closely related problems shared by those being represented.

Intake Date: Date on which client is first interviewed to determine eligibility and collect general background information.

Legal Problems Code(s): Numeric codes organized by major topical areas assigned to legal problems. The code that best describes the client's legal problem should be selected; if two or more closely related legal problems are involved in the case, the code

which describes the problem requiring the greatest level of effort to resolve should be selected.

Major Reason Case Closed: The circumstance or event causing the program to determine that no further action is to be taken on the case. If the case is closed for more than one reason, the single major reason which best describes why the case was closed should be selected.

Type of Legal Problem: The list of the types of legal problems, by definition, encompasses all types of cases that will be handled with Corporation funds.

II. Matters Report

Matters Report is now referred to as the "Other Services Report" by LSC.

The Matters (Other Services) forms are designed to collect information on non case activities (other services) as described in our Program Letter 02-9 dated October 16, 2002 which replaced Program Letter 01-2 dated May 15, 2002. Before you start working on this form we urge you to go through the revised Program Letter 02-9 (including all the attachments), and Other Services Reports Frequently Asked Questions. All recipients of 2007 funding should complete these forms.

There are six categories of non-case other services:

- I. Community Legal Education
- II. Pro Se Assistance
- III. Referrals
- IV. Outreach
- V. Indirect Services (Indirect Other Services)
- VI. Other Matters (Miscellaneous Other Services)

I. Community Legal Education

Please describe services by models used. This consists of activities aimed at informing the community about their legal rights and responsibilities connected with various situations they might encounter using different ways as given in the form.

II. Pro Se Assistance

This section of the form is designed to capture general information and assistance provided to people wishing to handle simple legal matters themselves without extensive assistance from an attorney. This may include 'help desk at court', 'workshops or clinics' among others. Refer to the form for the various categories included.

III. Referred Matters (Referred Other Services)

In this section of the form please report referrals that do not qualify as 'cases' - i.e. any referral in which no actual legal advice or other legal service is provided directly to the client. See the form for the various categories included in this form.

IV. Outreach

In this section of the form please report all the methods used to inform potential clients about the availability of services for which they might be eligible. The following methods are given in the form. 1) Informational notices published in print media, 2) TV spots or PSAs, 3) Radio spots or PSAs, 4) Newsletter(s) - external to program, 5) Referral agreements with other agencies, 6) "How to reach us" pages on web sites and 7) Other. Please check all applicable methods you used. Also please explain in your narrative any method that you listed under Other.

V. Indirect Service Matters (Indirect Other Services)

is designed to capture information on non-case activities that address legal problems of the low income community through models that supplement and complement traditional, more direct legal assistance activities. This includes legal education for lay service providers and collaborative service delivery models. Please check all applicable methods used. Please also describe in your narrative the models that you listed under "Other indirect service matters" ("Miscellaneous Other Indirect Services").

IV. Other Matters (Miscellaneous Other Service)

This section of the form is designed to capture additional non-case other services not covered by the specific categories listed above. There are two additional numeric categories: Mediation/ADR and Direct Services. The Direct Services category is intended to cover direct services such as notarizing documents which do not qualify as case services reportable in the CSR's.

Part A. 3. Financial Definitions

Budget Form Support and Revenue Definitions

You must use the definitions provided herein for completing the forms for 1) revenues/sources of funds and 2) expenditures. You must also use these definitions for reporting financial information related to subgrants.

IOLTA: Interest on Lawyer's Trust Accounts funding provided through the Michigan State Bar Foundation.

Filing Fees: Funding from the legal services portion of filing fees collected under legislation (1993 P.A. 189) and distributed pursuant to contracts issued by the Michigan State Bar Foundation.

Legal Services Corporation (LSC):

- **Basic Field Grant:** LSC funding that is allocated based upon the poverty population as determined by the Bureau of the Census 2000 Census of Housing and Population. This funding provides legal services to the general poor population. In addition, it includes basic Field funding that is specifically granted to address the legal needs of migrant farm workers, or funding that is specifically granted to address the legal needs of Native Americans (American Indians, Hawaiian Natives and Alaskan Indians). Please include basic Field funding and any other LSC funding or revenue in the separate line items on the form.
- **Other LSC Grants & Revenue:** Grants or other LSC revenue that are not within the standard LSC grant categories.

Foundation Grants: Funds from any private foundation, local, regional, or national (except IOLTA grants and Filing Fees contracts for civil legal services from the Michigan State Bar Foundation).

United Way: Funds from United Way, Community Chest, Red Feather, United Givers Fund, or other consolidated community fund-raising organizations.

City, County, and State Funding: Public funds from city or county agencies, including block grant funds under the Community Development Act administered by HUD (which are usually obtained from city or county agencies administering community development programs) or funds from a general revenue sharing program of a city, county or state (revenue sharing). Please report state, local, and CDBG grants in the separate line items on the form.

- **State Grants:** Public funds received from state agencies, exclusive of those included in the federal categories listed above, or IOLTA category listed above.

- **Local Grants:** Public funds from city or county agencies, except those included in the categories listed above.
- **Community Development Block Grants:** Block grant funds under the Community Development Act administered by HUD. The funds are usually obtained from city or county agencies administering community development programs.

Federal Grants include the following:

- **Title III - Administration on Aging:** Funds available under the Older Americans Act (usually Title III). Providers include state or area aging agencies and/or the U.S. Department of Health and Human Services/Office of Development Services/Administration on Aging.
- **Title XX - Health & Human Services:** Federal/state funds available under Title XX of the Social Security Act. The funding agency is usually the state welfare, human resources, or social services agency.
- **Violence Against Women Act:** Funds available under the Violence Against Women Act, including V-STOP and STOP grants. Providers include the U.S. Department of Justice and state and local agencies such as state attorneys general.
- **HUD Grants:** Housing and Urban Development Grants other than Community Development Block Grants.
- **Other Federal Programs:** Other sources of federal funding, including funds received for job training, community action, or community education.

Faith-based Funding: Funding from religious organizations.

Law Schools: Funding provided by one or more law schools.

Attorney Fee Awards: The amount received or expected to be received as the result of a judgment, court order, or settlement of cases.

Client Services Fees: Income earned from fees paid and other receipts attributable to for-profit operation as a law firm.

Fundraising: Income from fundraising appeals and other fundraising activities. These include the following:

- **Access to Justice Fund:** Access to Justice Fund Donations and endowment distributions which are received during the year.

- **Private Bar Fundraising:** Contributions from bar associations and related organizations, but not IOLTA, as well as contributions from bar members as a result of a fundraising campaign or event, or as a result of other fundraising efforts. Do not include Access to Justice Fund distributions under this category.
- **Cy Pres Awards:** *Cy pres* awards received during the year.
- **General (Non-Grant) Fundraising:** Income earned in fundraising activities, other than income for legal services to clients and not included in any other category.

Income from Publications, Training, Videotapes, and other Products: Income earned from publications, training, videotapes or other products produced in whole or in part with grant funds, including copyrighted materials.

Miscellaneous: This category includes all remaining support, revenue, or appropriated funding sources that are not identified in the glossary, including income generated as interest or dividends, income resulting from investment of funds on a short or long-term basis and/or rental receipts.

Beginning Fund Balance: Funds of any nature that are unexpended from a previous accounting period or calendar year and are available to be expended in the current reporting period or calendar year.

Ending Fund Balance: Funds of any nature that are unexpended during the current reporting period or calendar year and are available to be expended in a future accounting period or calendar year.

Ending Fund Balance in Cash, Investments & Grants: Should include the portion of the ending fund balance that is in funds or grants receivable that are available for expenditure for program purposes in future years.

Ending Fund Balance in Property and Fixed Assets: Should include the portion of the ending fund balance that is not available for expenditure for program purposes in future years (e.g. property fund, library fund, etc).

Donated Services: Value of services donated. Such services should be valued at the cost to the recipient, had the services been purchased.

Donated Property: Value of property donated. Such property should be valued at the cost to the recipient, had the property been purchased.

Budget Form Expense Definitions

Lawyers: This category should include all salaries, wages and profits paid to attorneys (other than for contract services), whether employed directly or supervised by the applicant and whether part-time, full-time, or temporary. It also includes law school graduates who have not passed a bar examination.

Paralegals: This category should include all salaries and wages paid to paralegals, whether employed directly or supervised by the applicant (e.g., senior aides) and whether part-time, full-time, or temporary.

Other Staff: This category should include all salaries and wages paid to all other staff, whether administrative/clerical staff, students, or others, and whether full-time, part-time, or temporary (e.g., Work/Study).

Employee Benefits: This category should include all fringe benefits paid on behalf of employees, including retirement, FICA, health and life insurance, worker's compensation, disability insurance, unemployment insurance, day care, and other payroll-related costs.

Space: This category includes rent or lease expenses and mortgage payments which are reported separately. It also includes, under "Other Expenses," janitorial, maintenance, and utility expenses.

Equipment Rental: This category includes lease or rental expenses for office furniture, fixtures, and equipment (except telephone). It also includes an estimate of maintenance costs for that equipment, whether pursuant to a service contract or an estimate of individual repair bills.

Supplies: This category includes all basic office accessories and supplies, including paper materials and supplies used for copiers. Printing and postage are also to be included in this category. All equipment purchases which cost less than \$100 may be placed in this line item.

Telephone: This category includes costs for the rent or lease of telephone equipment and long distance calls. Similar and related expenses, such as telegraph or other telecommunications, should be included as well.

Travel: This category includes travel expenses required by governing body members for fulfillment of the obligations of governing body membership and those travel expenses for staff related to client services (e.g., circuit riding, attendance at meetings, etc.). Training-related travel is to be reported under "Training."

Training: This category includes all non-personnel costs associated with the training of board members, staff, and others. Continuing education of staff members should also be included here. Examples are: travel to/from training events, per diem, conference registration fees or tuition, purchase of training materials, rent for facilities used in a training event, consultant fees paid to trainers, etc. Material or capital additions (equipment purchases) for training with a value in excess of \$100 should be reported under "Property Acquisition." No personnel costs should be included here.

Library: This category includes expenses for the maintenance and normal expansion of office libraries, including subscriptions to periodicals, books, reference materials, and multiple volume sets of law books. Capital additions to the library holdings costing over \$100 per item should be included under "Property Acquisition."

Insurance: This category includes professional liability insurance, errors and omissions insurance, bonding, property insurance (fire and theft), and liability insurance for property and automobiles.

Dues and Fees: This category includes dues and fees paid to professional organizations on behalf of the applicant/recipient or subrecipient and its staff.

Audit: This category includes expenses for auditors.

Litigation: This category includes court costs, witness fees, expert witness expenses, sheriff fees, courthouse copying fees, and other expenses incurred but not reimbursed by clients and not recovered in litigation on behalf of eligible clients.

Property Acquisition: This category includes equipment, library purchases and other major expenses that occur infrequently, and which are capitalized (e.g., major renovations). **Amortized amounts to be paid toward equipment purchases should be reported under Purchase Payments.**

Purchase Payments: This category includes all payments on loans secured to purchase property over \$100.

Contract Services to Clients: This category includes all payments to private attorneys and other entities who provide legal services to eligible clients, including those services provided pursuant to a subgrant. The applicant's subgrant should be reflected on this line.

Contract Services to Program: This category includes all other services to the applicant such as legal counsel, consultant fees exclusive of those paid for training, use of a computer service bureau, bookkeeping or other accounting services (other than those listed under "Audit"), etc.

Other: This category includes all remaining applicant expenses that are not identified in these definitions.

Part A. 4. Technology Form Definitions

Form K-1 and K-2 capture information about the applicant's staff and its computer and software capacity. All applicants must complete Forms K-1 and K-2. These forms are designed to collect information based on office technology in place at the time this application is completed. For LSC to obtain accurate information from these forms, all applicants must use consistent terms and concepts when compiling and submitting data. Please refer to the following definitions in responding to the technology questions in Forms K-1 and K-2.

Approved Computer: Defined as one that can perform all of the following functions: word processing, case management system access, access to time-keeping, Internet access, including the ability to download files from the Internet, and e-mail with the capacity to send and receive messages and files both internally and externally.

Non-approved computer: Defined as one which cannot perform the above functions.

Automated attendant: A system feature that automatically answers incoming calls using a computer program instead of a live person. This feature may offer options to the caller, or may be connected to voice mail.

Automatic call distribution: A software application that delivers calls on a first come, first served basis. Calls are held and transferred automatically to the first available staff person assigned to those calls.

Bandwidth: The amount of data that can be transmitted in a fixed amount of time. For digital devices, the bandwidth is usually expressed in bits per second (bps) or bytes per second. For analog devices, the bandwidth is expressed in cycles per second, or Hertz (Hz).

Computer Network: A shared structure of computer hardware and software that serves users within a confined geographical area. It is made up of servers, workstations, a network operating system and a communications link. Servers are high-speed machines that hold programs and data shared by network users. The workstations are the users' personal computers, which perform stand-alone processing and access the network servers as required.

Interactive voice response: A system feature requiring a response from the caller, often using specifically designed recordings within the phone system.

E-mail: Short for electronic mail, this is a system that lets people send and receive messages and files with their computer both internally and externally. The system might be on a large network (such as the Internet), or over an office's own office network.

Legal Meetings: Web-based online conference center available at low cost to all LSC funded programs.

Phone system: The computer software and/or equipment used to handle telephone calls.

Routers: A device that forwards data along networks. A router is connected to at least two networks, commonly two local area networks or wide area networks. Routers are located at the places where networks connect. Routers use forwarding tables to determine the best path for forwarding data, and protocols to configure the best route between networks.

Self-direct: When a caller, whose call is answered by an automated attendant, can decide where their call will be answered or handled. Examples include choosing to go to a voice mailbox or selecting a staff person's extension.

Self-select: An ACD feature allowing callers to choose between options of pre-recorded messages.

Telephony integration: Telephony is the technology that electronically transmits voice, fax, email and other communications between two or more parties, integrating telephone and computer capabilities. Also referred to as Voice Over IP.

Voice Over IP: "Voice Over Internet Protocol" (VOIP). This technology sends voice information in digital form instead of using traditional protocols of the public switched telephone.

PART B. – Application and GAR Electronic Submission Instructions

This report must be completed electronically using a full version of Adobe Acrobat 7.0 or 8.0 software (not just Acrobat Reader) and Microsoft Excel software. Please enter information in the Acrobat forms at each field by typing in your response or by editing the existing response from a previous year. You can TAB (forward) or SHIFT-TAB (backward) between fields and scroll between pages. The space limitations will be apparent in the electronic form. Please stay within these limitations if possible. You will not be able to print out the information exceeding the space limitation though it will remain in the electronic answer. The Foundation will print hard copies of answers exceeding space limitations for you upon request. You are required to submit a disk as well as one hard copy. You may file your forms by e-mail if you wish. Call Rick Winder at 800-968-6723 with questions.

Please be sure to check grammar, spelling, and punctuation prior to submitting your Grant Application or GAR. To check spelling in Acrobat, press <F7> or use the spell-checking feature at <Edit>, <Check Spelling>, <In Comments, Fields, and Editable Text>. Also, please do not use cross-reference citations. Instead, copy the information and paste it into the new location. The information you provide in these forms is transferred directly to a report for the Legal Services Grants Committee and the Trustees.

Part B.1. – Electronic Files

We have provided you with electronic files containing 23 forms files (17 for the Application; 19 for the GAR) with the three sections of the Combined Forms Package for your use in preparing your Application or GAR. You are required to complete these forms electronically and submit a disk as well as a hard copy of the Application or GAR to the Foundation by the due date. You can print the hard copy of the forms directly from the Acrobat Forms and the Excel Spreadsheet. Be sure to save the forms frequently to preserve your edits. Also, you may file your forms by E-mail if you wish.

You will need a copy of Adobe Acrobat version 7.0 or 8.0 and Microsoft Excel software to complete the forms (the full version, not just Acrobat Reader, which does not permit you to save the form data). If you need a copy of this software, please let us know. If you need assistance with the electronic format, please contact Rick Winder at 800-968-6723.

Your electronic files contain the following Adobe Acrobat (PDF) and Microsoft Excel (XLS) files for completion of the 2007 Grant Report for your files, “gar” is replaced by the first three initials of your program):

Part I. Program Organization Description

- | | | |
|------------------|---------|--------------------------------------|
| ● “07gar11a.pdf” | Part I. | Consolidated List of Attachments |
| ● “07gar12o.xls” | Part I. | Legal Services Offices |
| ● “07gar13b.xls” | Part I. | Board Member Information (LSC Form) |
| ● “07gar14.pdf” | Part I. | Overview of the Program Organization |

Part II. IOLTA and Filing Fees Funding Request

- “07gar21.pdf” Part II. Legal Services IOLTA Grant and Filing Fees Contract
- “07gar22cc.pdf” Part II. Estimated Current Year Cases (**Application Only**)
- “07gar23pc.pdf” Part II. Projected Cases (**Application Only**)
- “07gar24csr.pdf” Part II. Client Service Report (**GAR Only**)
- “07gar25csr.h.pdf” Part II. Hotline Cases (**GAR Only**)
- “07gar26csrp.pdf” Part II. Private Attorney Involvement (**GAR Only**)
- “07gar27msrn.pdf” Part II. Matters Service Report and Narrative (**GAR Only**)
- “07gar28msr.pdf” Part II. Statistical Matters Service Report (**GAR Only**)
- “07gar29g.xls” Part II. Geographical Distribution of Services (**GAR Only**)

Part III. Financial and Staffing Information

- “07gar30cr.pdf” Part III. Current Revenues and Sources of Funds
- “07gar31ce.pdf” Part III. Current Legal Services Expenditures
- “07gar32cs.pdf” Part III. Current Legal Services Staffing
- “07gar33pr.pdf” Part III. Proposed Revenues and Sources of Funds (**Application Only**)
- “07gar34pe.pdf” Part III. Proposed Legal Services Expenditures (**Application Only**)
- “07gar35ps.pdf” Part III. Proposed Legal Services Staffing (**Application Only**)
- “07gar36co.pdf” Part III. Proposed Carryover of Funds to Subsequent Year
- “07gar37sg.pdf” Part III. Report on Subgrants or Contracts with Others
- “07gar38t.pdf” Part III. Technology Forms
- “07gar39sa.xls” Part III. Breakdown of Financial, Staffing and Services by Service Areas

You will probably wish to make working copies of these files on another disk or drive before using them, and retain the original as a backup in case you have a problem.

If you experience a “connection” error when you open the Acrobat forms, simply ignore these messages by clicking “OK” on the error messages, and the form should open. You will then be able to use the form normally and save the data. This occurs because the forms were designed with a connection to the Foundation grants database in order to fill the forms with last year’s data. Since the form will not be connected to our database while you are completing it, Adobe Acrobat will give you a message indicating there is not a connection (e.g., “connect operation failed” or “cannot perform that operation”).

You should save your data frequently. If you have a full version of Adobe Acrobat, the data is saved right within the form as you save the form. You should save the form frequently in order to avoid loss of data.

We have produced these forms as a convenience for you in completing the Application and GAR. Our choice of Adobe Acrobat and Excel is to make the forms more useful and to make your job easier, not harder. If you have any difficulty in using these forms, please let us know immediately at 1-800-968-6723.

Use Acrobat and Excel to print your report and to save your data within the form, which you will return to us. Your prior year information (from your prior Application or GAR) is already included ("embedded") in these form files, so you can edit last year's information to create your current Application or GAR. Therefore, you may be able to complete the forms quickly using last year's report as a starting point, making any changes directly in the form. In Windows, you can also electronically copy text from other documents for editing, where appropriate. It is best to copy and paste from a plain text file rather than a formatted (e.g., Word or WordPerfect) file. If last year's narrative information is not useful, just delete it and replace it with your new narrative.

These forms cover the narrative portions as well as the tables. The electronic files include "spreadsheet" tables which calculate totals, so the full Application and GAR can be completed with the computer file rather than having to insert separate tables. Rick Winder will be happy to answer questions about using the tables or advise on how to use the Acrobat and Excel files efficiently.

Please observe the length guidelines given in the report package for each question. The form software will permit you to enter a long narrative by going beyond the end of the input screen but your report will get a better reception if each response is succinct and to the point. In addition, your observance of the length guidelines will assist our use of your narrative in our reporting. We appreciate your cooperation on this. You will not be able to print out the information exceeding the space limitation though it will remain in the electronic answer. The Foundation will print hard copies of answers exceeding space limitations for you upon request.

Printing Your Report: If your report does not print properly, check your printer settings (choose "select printer" from the print screen) to make sure the correct printer is selected and the printer contains the proper settings. The forms are currently set up for our network printer, so you may need to edit the printer settings to set it up for your printer.

Submitting Your Report: *The Foundation requires a paper copy (i.e., a printout) of your report* with all pages in order and attachments included, **in addition to a copy of the electronic files.** No special procedure is required to prepare the forms for electronic submission. Simply save the files as you change them, and send the Foundation the final version of the Acrobat and Excel files which contain your changes.

Questions? Contact Rick, Celee, or Linda (in that order) at the Foundation (800 968-6723).

(updated 3/2008)