

**Montgomery Bar Foundation
Guidelines for Grant Requests**

THE MONTGOMERY BAR FOUNDATION, a private Foundation, is the charitable arm of the Montgomery Bar Association. In accordance with the Bar Foundation's Mission Statement, the Foundation will fund agencies which provide for: 1) legal services to the indigent, 2) facilitate the administration of justice, and 3) other law-related educational and charitable initiatives, with preference for law related programs.

APPLICATIONS are accepted only from organizations and/or programs which provide services in or to residents of Montgomery County. Applications are only accepted from tax exempt non-profit organizations, as designated by the Internal Revenue Service. The Montgomery Bar Foundation requires that assets of the Foundation be given only to organizations organized and operated exclusively for charitable, educational, literary, or scientific purposes as shall at the time qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code of 1954 (or the corresponding provision of any successor statute).

ORGANIZATIONS may apply for general operating support or for specific projects. Funding is generally not provided for the following:

Capital Expenditure
Conferences, Seminars, Travel Expenditure
Deficit Funding

GRANTS have averaged in the amount of \$1,000 to \$2,500. Grants are for one year only.

When an organization has been funded by the Foundation, a report on the use of the Foundation's grant, based on the proposal, must be made at the end of the year in which the grant is awarded. Agencies should inform the Foundation of any major changes in, or problems with, the program or staff.

DEADLINES: The Grant Review Committee will review grants and make recommendations to the Board for award considerations twice a year based on receipt of applications received before the following deadlines: March 31st and August 31st of each year.

You will be contacted if the Grant Review Committee needs additional information. Applications are accepted throughout the year.

**MONTGOMERY
BAR FOUNDATION**

**100 West Airy Street
Norristown, PA 19401
610-279-9660**

GRANT REQUESTS should be brief, and yet include all information necessary. They should include:

- a. Montgomery Bar Foundation cover sheet.
- b. Basic Proposal: History of Agency; Agency's activities and accomplishments; rationale and need for grant; target population; plan to monitor effectiveness for grant, etc.
- c. List of Board of Directors and Officers.
- d. Copy of most recent IRS determination letter regarding organization's 501(c)(3) tax exempt status.
- e. Current year's funding sources and amounts.
- f. Specify costs, goals and geographic area to be served by Bar Foundation funding.
- g. Financial statement; audit if available
- h. Annual Report, if available.

MATCHING FUNDS: If funding must be received by a certain date in order to be eligible for Matching Funds, please specify on the cover sheet under Matching Funds.

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GRANT REQUEST

NAME OF ORGANIZATION : _____

Date organized: _____

ADDRESS: _____

(Street) (City) (State) (Zip)

INFORMATION CONTACT: _____

(Name) (Title) (Telephone)

PREVIOUSLY RECEIVED A MONTGOMERY BAR FOUNDATION GRANT:

Yes No

CURRENT AMOUNT REQUESTED: _____

Description of Use of Previous Grant: _____

GEOGRAPHIC AREA TO BE SERVED: _____

BRIEF DESCRIPTION OF PROPOSED USE OF FUNDS: _____

MATCHING FUNDS: _____

(Brief Description of Source and Availability of Matching Funds)

BUDGETARY YEAR: _____

TAX EXEMPT ELIGIBILITY: _____ Yes _____ No

Two (2) copies of this Application/Proposal must be furnished to the Montgomery Bar Foundation at the time of submission. Please remember to include all requested items referred to on Page 2 of the Guidelines. Applications which do not include all requested information will be considered incomplete and may not be considered by the Review Committee.

How did you find out about this grant request?

DATE: _____ **SUBMITTED BY:** _____ **TITLE:** _____

REVISED MBF 12/8/03