

District of Columbia Bar Foundation

GRANTEE MID YEAR REPORTING FORMAT
FY 2009 IOLTA/PRIVATE GRANTS

The DC Bar Foundation requires each organization that received an IOLTA/private grant in FY 2009 to submit a mid year report. The goal of the mid-year report is to detail the progress of your organization toward the goals for which Foundation funds were provided through your FY 2009 IOLTA grant agreement. *The deadline for FY 2009 mid year reports is January 15, 2010. Reports should be transmitted electronically to grants@dcbarfoundation.org no later than 5 pm on January 15, 2010.*

Please use the format described below for your organization's mid year report.

I. Cover Sheet

The cover sheet or cover letter for the report should contain:

- Organization's name and contact information;
- Contact person's name, title, and contact information;
- Grant period and total dollar amount of DC Bar Foundation support provided during the reporting period for this grant; and
- Signature of Executive Director or equivalent.

II. Required Attachments:

Please provide a year to date financial statement showing an accounting of the status of Foundation funds, and showing budget vs. actual revenue and expenses.

III. Report Narrative

Please select the report section(s) appropriate to the FY09 grant you received. All grantees should complete Section A.

A. Substantive Report Section (not to exceed 4 pages)

Please address the following questions in preparing your report:

1. **Service Delivery**

(a) How many individuals has your organization provided legal representation or legal services since the beginning of the grant period?

(b) How many of these individuals were DC residents?

(c) What kind of legal problems has this service involved?

(d) To the extent possible, please identify the general nature of the service provided, e.g. outreach, intake, brief services, extended representation, etc. This information should be tailored to your program and the nature of services your program provides which are funded wholly or in part with DCBF funds.

(d) Has the demand for your legal services been affected by the recent economic downturn --- that is, have you seen an increase in the demand for your services. Please provide details regarding the areas in which this increase has occurred.

2. **What progress have you made toward the goals set forth in your FY 2009 grant application?**

(a) Describe your progress to date on the plan for the year, including successes and challenges.

(b) In the case of challenges, describe how those are being handled, and the extent to which these challenges affected the implementation of your plan. Please be specific.

(c) Based on your experiences to date, what do you consider to be the most important programmatic concern(s) currently facing your program/organization?

(d) Have you used the DCBF grant to enhance or develop collaborations with other providers in the relevant community(ies)? IF so, please describe in detail.

(e) Has this grant been instrumental in attracting additional resources, including volunteers, money, goods, services, or publicity? If so, please describe.

(f) What additional information about your program or organization's work during this grant period do you think is important for DCBF to know as it evaluates the impact of its grant funding?

B. Challenge Grants (not to exceed 4 pages)

Describe the steps taken so far this year to advertise the DCBF challenge or otherwise solicit support to meet the challenge.

C. Conditional grants (not to exceed 4 pages)

If your grant has conditions attached (see your June 2009 grant letter), what progress have you made toward meeting them? What impact to date have these conditions had on your organization? Please be specific.