



Delaware Bar Foundation

FY 2027 IOLTA GRANT APPLICATION AND GUIDELINES

The Delaware IOLTA Program

The Delaware Interest on Lawyer Trust Accounts (IOLTA) Program was established by Order of the Delaware Supreme Court in 1983. The program is funded through interest earned on lawyers' pooled trust accounts holding client funds that are nominal in amount or held for a short period of time. These funds, interest that would otherwise not be generated for individual clients, are transferred to the Delaware Bar Foundation and used to promote and improve civil legal services for low-income Delawareans and to support other public-interest programs authorized by the Supreme Court. Grant recommendations are developed by the Foundation and submitted to the Delaware Supreme Court for final approval.

IOLTA Grantmaking Policies

The Delaware Bar Foundation views IOLTA funds as a vital source of support for nonprofit organizations that provide legal services to low-income Delawareans and advance law-related education and the effective administration of justice. While continuing to support established programs, the Foundation also encourages innovative and collaborative initiatives that respond to emerging needs and expand access to justice statewide.

The Foundation does not apply a fixed funding formula or geographic allocation. Instead, subject to approval by the Delaware Supreme Court, grants are awarded based on demonstrated need, program merit, and the availability of funds. All grants are made on a one-time basis, and neither new nor returning applicants are guaranteed ongoing or consistent funding levels. The Foundation also reserves the right to deny future funding or terminate a grant if there is substantial noncompliance with grant requirements, misuse of funds, or insufficient available resources.

Application Submission Deadline: April 10, 2026

Grant Award Announcement: By June 30, 2026

Submission Email: mgreenberg@delawarebarfoundation.org (Attn: Megan Greenberg)

Grants are typically disbursed quarterly, absent unusual circumstances.

IOLTA Funds may be awarded:

- To improve the administration of justice;
- To provide and enhance the delivery of legal services to the poor;
- To support law-related education; and
- For such other purposes that serve the public interest.

I. Eligibility Attestation

By checking each box, the Applicant attests:

The Applicant is a not-for-profit, tax-exempt entity under the Internal Revenue Code and operates within Delaware.

The Applicant provides free civil legal services to indigent individuals in Delaware or promotes law-related education throughout Delaware.

The Applicant uses an income eligibility test at 125% of the Federal Poverty Level; clients between 125% and 200% FPL are served only in specifically justified circumstances (e.g., pursuit of government benefits for low-income individuals).

IOLTA funds will not be used for: grants to individuals, political campaigns, religious organizations, lobbying organizations, or private practice lawyers.

I acknowledge that IOLTA funds will not backfill paused or terminated federal funding.

Applicants who cannot attest to all items are ineligible for IOLTA funding.

II. Executive Summary (All Applicants) - 300 words max

Amount requested and total program budget:

Program purpose and target population:

Delta from prior year (changes in request amount, staffing, service model, geographic scope, lessons learned):

Impact example (anonymized):

III. Applicant Information

Applicant Organization Name:

Contact Person (if different):

Mailing Address:

Phone: _____ Email: _____

Nature of Organization:

Federal Tax ID Number:

Is the organization exempt from federal income tax? Yes No

If yes, attach IRS determination letter. If exempt without a letter, specify I.R.C. § 501(c)_____.

IV. Project Details

Date of Application: _____
Project Start Date: _____ Project End Date: _____
Grant Amount Requested: \$ _____
Total Program Budget: \$ _____

Continuation Status:

- Continuation/Expansion of Existing Program
 New Program - If New Program, justify why a new initiative is warranted over expansion of existing services:

V. Applicant Description (Full Form Only) - 3,000 words max

Describe: (1) mission; (2) communities served and eligibility criteria; (3) major services and delivery model; (4) qualifications of key personnel; (5) significant recent accomplishments; (6) governance and management structure relevant to this program:

VI. Narrative Proposal (Full Form Only) - 4,000 words max

Address: objectives and need; methodology; evidence and professional standards; pro bono integration; scope and reach; risk and mitigation; evaluation plan; lessons learned; sustainability and leverage:

VII. Alignment with Funding Priorities

Briefly address and self-score (0-5) each area:
Service Quality and Professional Standards (0-5): _____
Additional Income Sources/Leverage (0-5): _____
Expansion of Existing Programs vs. New Initiatives (0-5): _____
Pro Bono Integration (0-5): _____
Narrative:

VIII. Success Measurement and KPIs

Identify at least three quantifiable key performance indicators (KPIs) tied to outputs and outcomes. Include your data collection and quality assurance plan.

KPIs:

Data Collection and QA Plan:

IX. Budget and Funding

Complete Appendix I: Budget Proposal Form (mandatory). Clearly identify:

- IOLTA-requested line items versus total program costs
- Restricted uses and how IOLTA dollars will be allocated only to permissible activities
- All income sources (secured and pending), with amounts, status, restrictions, and performance periods

Note: IOLTA funds will not replace paused or terminated federal funding.

Attach:

- Most recent audited financial statements
- Organizational operating budget (current fiscal year)

Complete Appendix III: Funding Sources Matrix (mandatory).

Reserves: Do you have a reserve policy? If so please describe the policy including:

- the targeted balance for the reserve (e.g., number of months of operating expenses, percentage of total funding, dollar level etc.
- the approval process for accessing/ spending down the reserve, and
- approved uses for spending down the reserve.

In the last operating cycle, have you spent down the reserves? If so, describe how much, for what purpose and plans to replenish it.

X. IOLTA Program Data

Complete Appendix II: IOLTA Program Data Sheet, including prior fiscal year actuals and current YTD for staffing, clients served, case types and dispositions, outcome metrics and throughput, and pro bono participation.

XI. Organizational & Governance Information

Complete Appendix IV: Organizational & Governance Information, including board roster and composition; recruitment, orientation, evaluation practices; strategic planning cadence and priorities; and leadership succession planning and key person risk.

XIII. AI Use & Readiness (NEW for FY2027)

Has your organization adopted or used any AI tools since July 1, 2025?

Yes No

If yes, list each tool and its primary purpose.

For what functions are AI tools being used?

Client intake / triage

- Legal research
- Document drafting
- Program evaluation
- Administrative tasks
- Client communication / chat support
- Other (describe)

Has AI adoption increased productivity or efficiency?
If yes, describe the improvements.

Estimate staff time saved per week or month due to AI-supported processes.

Has AI increased the number of clients served or expanded program reach?
If yes, provide quantitative or qualitative examples.

Describe any improvements in timeliness, accuracy, or capacity enabled by AI.

How has AI affected staff workload, stress levels, or task distribution?

Overall impact of AI adoption on staff morale:

- Very positive
 - Positive
 - Neutral
 - Negative
 - Very negative
- Please explain.

Have staff expressed concerns about AI? How are these being addressed?

Does your organization have a written AI use policy?

- Yes
- No

If yes, attach or summarize.

Describe training staff have received regarding safe and ethical use of AI tools.

Describe how client confidentiality, HIPAA-equivalent standards (if applicable), and data security are protected in AI workflows.

Has your organization experienced any AI-related data security incidents or near-misses?
If yes, describe.

Has AI affected accessibility, language access, or client understanding? If so, describe.

Are you requesting funding for AI tools, subscriptions, training, or implementation as part of this grant proposal?

- Yes
- No

If yes, provide the total amount requested and a brief justification.

Describe how AI-related expenditures will advance the goals of this project.

How will your organization evaluate the effectiveness of any AI tools funded by this grant?

XIII. Oral Presentation Eligible grant applicants will be invited to present to the board for consideration.

XIV. Prior Grant Performance (Returning Grantees)

Attach a 1-2 page performance summary for the most recent IOLTA grant period, including outputs, outcomes, variances from plan, key learnings, and any corrective actions.

XV. Alignment with Mission Pillars

Select the primary mission pillar and provide a short narrative on measurable contributions:

- Legal services for individuals affected by poverty
- Law-related education

Narrative:

XVI. Required Attachments Checklist

- IRS determination letter (or explanation of exemption basis)
- Most recent audited financial statements
- Organization operating budget (current fiscal year)
- Appendix I: Budget Proposal Form
- Appendix II: IOLTA Program Data Sheet
- Appendix III: Funding Sources Matrix
- Appendix IV: Organizational & Governance Information
- Prior Grant Performance Summary (returning grantees)
- Additional materials relevant to the proposal

Incomplete submissions may be deemed ineligible.

XVIII. Certification

State of Delaware)
County of _____)

I hereby certify that all information provided in this application and attachments is true, correct, and complete. I am authorized to submit this grant application on behalf of the Applicant organization. I acknowledge and agree that any funds awarded by the Delaware Bar Foundation will be used exclusively for the stated, permissible purposes and will be allocated only to eligible activities. Unused or misused funds will be returned promptly to the Foundation. The Applicant

will comply with the Foundation’s payment schedule, reporting, and monitoring requirements, including quarterly disbursements (absent unusual circumstances), submission of required self-assessments, and any interim reports requested. I understand that any award is subject to the approval of the Delaware Supreme Court.

Dated this _____ day of _____, 20.

Authorized Representative Name (Printed):

Title: _____

Signature: _____

Name of Organization:

Organization Address:

Submission Instructions

Submit completed applications via email to: mgreenberg@delawarebarfoundation.org

Subject Line: FY2027 IOLTA Application - [Organization Name]

Questions may be directed to: Attn: Megan Greenberg

Appendix I - Budget Proposal Form (Mandatory)

Category	IOLTA Request	Total Program	Notes/Restrictions
Personnel (Salaries)	\$	\$	
Fringe/Benefits	\$	\$	
Professional Services (non-lobbying)	\$	\$	
Client Services/Direct Aid (allowable)	\$	\$	
Litigation Costs/Fees (allowable)	\$	\$	
Outreach/Translation/Accessibility	\$	\$	
Technology/Case Management	\$	\$	
Training/Supervision/QA	\$	\$	
Travel (program-related)	\$	\$	
Occupancy/Overhead (allocable)	\$	\$	
Other (specify)	\$	\$	
TOTAL EXPENDITURES	\$	\$	
Income: IOLTA (this request)	\$	-	
Income: Other Secured	-	\$	Source/term
Income: Other Pending	-	\$	Source/term
TOTAL INCOME	-	\$	Must equal Total Program

Certification (Budget): I certify IOLTA funds will not be used for ineligible purposes and will not backfill paused or terminated federal funding.

Signature: _____ Date: _____

Appendix II - IOLTA Program Data Sheet (Mandatory)

Metric	Prior FY (Actual)	Current YTD	Notes
FTE Attorneys			
FTE Paralegals			
Intake/Helpline FTE			
Cases Opened (by type)			
Cases Closed (by type)			
Dispositions (advice/brief, limited scope, full rep)			
Outcome Metrics (by type)			
Average Time to Resolution (days)			
Waitlist (avg/month)			
Client Demographics/Equity Indicators			
Pro Bono Hours (attorney)			
Law Student/Volunteer Hours			

Appendix III - Funding Sources Matrix (Mandatory)

Source	Type (Fed/State/Local/Private/ Other)	Amount	Secured/ Pending	Period	Restrictions/ Notes

Appendix IV - Organizational & Governance Information (Mandatory)

Provide: board roster with affiliations and terms; board recruitment, orientation, and evaluation practices; strategic plan or summary (date adopted and horizon); executive and key program leadership bios; and succession plan or risk-mitigation approach.