

# LAWYERS TRUST FUND OF ILLINOIS

## Legal Services Support Grant Guidelines

*(July 1, 2020 – June 30, 2021)*

### BACKGROUND

The **Lawyers Trust Fund of Illinois** is a private, not-for-profit foundation incorporated by the Illinois State Bar Association and The Chicago Bar Association in 1983. Under rules established by the Illinois Supreme Court, the Lawyers Trust Fund receives revenue from the Interest on Lawyer Trust Account (IOLTA) program; a portion of the annual registration fee paid by Illinois attorneys; and the remittance of unidentified funds from IOLTA accounts. The Lawyers Trust Fund uses the income from these sources to support the provision of legal aid services throughout the state.

### GRANTMAKING GOALS

In making its grant decisions, the Lawyers Trust Fund will support:

- Direct civil legal services to address the needs of individual clients;
- The provision of legal aid services in all areas of the state;
- An appropriate balance of delivery mechanisms (*e.g.*, advice & referral hotlines, advice & “brief service” projects, representation by staff and pro bono attorneys);
- Legal services that address the most critical needs of low-income individuals and families, including health, personal safety, family stability, access to shelter, and economic security;
- Legal problems that would not be addressed – based on geographic location, area of the law, and/or client characteristics – without the applicant’s services.

### GUIDELINES & CRITERIA

In reviewing applications and making funding decisions regarding Legal Services Support grants, the LTF staff and directors will consider criteria in two major categories: **service delivery** and **organizational strength**. Applicants should keep these criteria in mind as they complete the application process.

### **Grant Criteria: Service Delivery**

- **Legal Needs Addressed:** What type of legal problem(s) and client need(s) does the applicant address? Are these critical needs for low-income individuals and families? Are these services unique or are they also addressed by other organizations serving the same client population and/or geographic area?
- **Delivery Methods:** Does the applicant use delivery methods that appropriately balance efficiency, effectiveness and accessibility? Is there evidence that the applicant has taken steps to evaluate and improve its delivery system?
- **Levels of Service:** Does the organization provide appropriate levels of service (*e.g.*, brief services, litigation) to effectively address client needs, based on its mission and priorities? Has the program taken steps to evaluate and/or rebalance the levels of service it provides?
- **Quality:** Does the organization have systems of quality control in place? Do case-handlers and supervisory personnel have adequate levels of experience? Are training and mentoring opportunities available for staff and/or volunteers?
- **Productivity:** Is there evidence that the organization attempts to measure and improve productivity in the area of client services? Does the organization make appropriate use of technology (*e.g.*, automated document production and case management software)? Has the applicant taken steps to streamline the intake process in order to respond quickly and effectively to requests for assistance? Has the organization taken any steps to try to increase the number of clients provided with representation?
- **Use of Volunteers:** Does the applicant make appropriate use of volunteers, both as case-handlers and in other capacities? Does the organization have systems in place to recruit, train, support, monitor, recognize and retain volunteers?

### **Grant Criteria: Organizational Strength**

- **Fiscal Management:** Does the organization have adequate internal controls and accounting policies in place? Is the audit completed in a timely fashion and free from major concerns? Is there evidence of adequate fiscal oversight by the governing board?
- **Governance:** Does the applicant have a governing board with the requisite experience and skills to oversee the organization? Are members of the governing board engaged, as measured by attendance at meetings and personal financial contributions? Does the board develop new leaders and encourage board renewal through limits on officers' terms and/or board tenure?

- **Fundraising:** Does the organization have the capacity to raise sufficient funds to remain stable and/or grow? Does the organization have a diversified base of financial support? Is there evidence that the organization is making an effort to increase its fundraising revenue and tap into new funding sources?
- **Vision:** Does the applicant organization have the capacity for self-renewal? Does it engage in strategic planning to anticipate and prepare for future needs and opportunities? Do the people involved in the organization -- board and staff -- have the will and the imagination to make the organization's future brighter than its past?
- **Leadership:** Does the staff leader (or leadership team) have the necessary skills and experience in the areas of fiscal management, personnel management, and the supervision of legal work? Is the leader capable of creating a supportive environment in which people want to work (one indicator being the rate of staff turnover) or volunteer?

## CRITERIA FOR INCREASED FUNDING – FY 2021

The LTF board of directors has set a target grant amount of **\$11,000,000** for Legal Services Support grants for FY 2021. This amount is an increase of \$1,001,270 (10%) from the FY 2020 grant total. It is important to note that \$750,000 of this increase will be drawn from funds remaining from the Bank of America settlement award received by LTF in 2016. LTF has used the settlement funds to support two special grant programs, including the Ready to Work Initiative (R2W). The purpose of this portion of the increase is to provide transitional funding for existing R2W projects during FY 2021.

The remaining portion of the FY 2021 increase – \$251,720 – represents a 2.5% increase over total FY 2020 grants, and will be awarded for purposes outside of the R2W projects based on the criteria below.

### **FY 2021 Criteria**

Decisions on how to distribute these additional funds will be based on the following priorities, listed in order of importance:

1. The continuation of successful efforts currently funded under LTF's Ready to Work Initiative.
2. Requests for merit-based increases based on the "Productivity" criteria listed above.
3. Requests based on financial need.

## FOR MORE INFORMATION

We encourage applicants to contact us with any questions about the Lawyers Trust Fund's guidelines, application procedures or funding criteria. You may contact Executive Director Mark Marquardt (312.938.2133 or [mark@ltf.org](mailto:mark@ltf.org)) or Associate Director and General Counsel David Holtermann (312.938.3076 or [david@ltf.org](mailto:david@ltf.org)).