



MASSACHUSETTS BAR FOUNDATION

KEEPING THE PROMISE OF JUSTICE SINCE 1964

2011/2012 IOLTA GRANTS PROGRAM

MIDYEAR REPORT NARRATIVE INSTRUCTIONS

DUE BY FEBRUARY 10, 2012

The Midyear report on your 2011/2012 IOLTA grant will assist the Massachusetts Bar Foundation (MBF) to evaluate the programs its funds support and to determine the impact of these programs within their client communities.

The narrative of your midyear report should follow the outline below and should not exceed three (3) pages. Please write concisely. You are welcome to submit the required information in bulleted form.

For your report to be considered complete, **Midyear Client Statistics Report and Midyear Budget Report** forms must be submitted along with the narrative. The forms are available online at www.MassBarFoundation.org.

If you have any questions, please contact Elizabeth Lynch at 617-338-0534 or elynch@massbar.org.

NOTE: Please submit three (3) copies of your entire report.

1. Identifying Information

- Organization Name, Address, Email/Website, and Telephone
- Project Title and Grant Amount
- Name and Title of person completing report

2. Reporting Period—September 1, 2011 ~ January 31, 2012

3. Staffing—Please provide a brief description of project staff (list name and position), as well as any staff changes that have occurred during the reporting period. For non-attorney advocate positions, please provide information regarding supervision and relevant training during the reporting period.

4. Progress to Date—Referring to the goals and objectives in your application (or any revisions submitted subsequent to the grant award), please report on the progress made during the first half of the grant period.

Describe specific program activities, reporting the measurable quantitative program outcomes as rigorously as possible, including, as applicable, number of cases opened, clients served, volunteer attorneys recruited, and training sessions conducted. Be sure to differentiate between referrals, brief cases, and full representation cases. If your program utilizes volunteer attorneys, indicate how many took cases (and number of cases) during the reporting period.

Please be sure to provide your own qualitative feedback on program outcomes and activities, comparing activities and outcomes to those of the previous year/s. In addition, be sure to report on not only service delivery outcomes, but also client outcomes. (how do you define a successful outcome for a client; is the model of service provision meeting the needs of clients you serve, etc.).

If your program does not provide direct representation by attorneys, please define what you consider a “case.” Please provide information regarding the outcomes of program activities (for example, in an ADR program, how many referrals went to mediation, how many mediations reached an agreement).

5. **Collaboration**—Please describe significant collaboration with other organizations/agencies and its effect on this specific project.
6. **Funding Update**—How much of the total program budget for the grant period has been secured? How does this compare to the same period last year? How will your organization address any deficits in the spending for this program?
7. **Challenges**—Report briefly on the most significant challenges to your work during the first half of the grant period. Describe your efforts to overcome them.
8. **Client Story**—Include a short description of a client who was assisted by this project. Client profiles may be used in Massachusetts Bar Foundation publications, therefore, please change identifiers to protect client confidentiality.

NOTE: Please do not submit a story that you have included with earlier reports, unless you are providing an updated version. We strongly encourage you to provide a new client story with each report.

9. **Midyear Client Statistics Form**—Do not use percentages on this form.
10. **Midyear Budget Report Form**—When filling out the budget form, please include a list of all other funding sources, both concurrent and potential, and amounts of funding sought/secured for this project. The total amount of funding sources plus the MBF grant should equal the total program budget.

Please submit three (3) copies of your Midyear Report (hard copy format only, not electronic) to:

**Elizabeth Lynch, Executive Director
Massachusetts Bar Foundation
20 West Street
Boston, MA 02111**