

Legal Services Trust Fund Program

Application Checklist for Support Centers

Applicant Name: _____

Please check your completed application against this list of all materials required for a complete package. Submit the completed checklist *on top* of the application package.

The application must be received in the Legal Services Trust Fund Program Office by 5:00 p.m. on **Monday, June 2, 2014**. You must send the original application, with original signatures, **and** one copy of the application forms. Electronic or fax submissions **will not** be accepted in lieu of timely receipt of a fully-executed, original hard copy under any circumstances.

Forms I through XI plus enclosures 1, 6, 11-14 and 16 must be submitted by all applicants. Form X-A and enclosures 2, 7-10 and 15 must be submitted by those applicants to whom they apply. **Do not send** enclosures 3, 4 and 5 if they were previously submitted to the Legal Services Trust Fund Program and no material changes were made to the documents in 2013.

Application forms enclosed:

- I. Applicant Profile
- II. Description of Organization
- III. Eligibility Criteria
- IV. Certifications
- V. Assurances
- VI. Quality Control Review
- VII. Staffing and Volunteer Report for Support Centers
- VIII. Source of Funding Report
- IX. Total Corporate Expenditures
- Itemized Expenses
- X. Expenditures for Support Services (Primary Purpose)
- X-A. Additional Information About Expenditures for Support Centers with Certain Activities
- XI. Annual Assistance Summary Report (*include list of projects served*)

Forward one set of completed electronic application forms and attachments 9, 14, and 15 **ONLY** to trustfundprogram@calbar.ca.gov.

Enclosures:

Enclosed	Previously Submitted	Does Not Apply	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. One extra copy of all application forms.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. A one-page description of your center, if you must be deemed of special need under Eligibility Guideline 2.9.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Articles of Incorporation certified by the Secretary of State.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Determination letter from the Internal Revenue Service granting your application for exemption, or a copy of your application for exemption and an explanation of its status.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Determination letter from the Franchise Tax Board granting your application for exemption, or a copy of your application for exemption and an explanation of its status.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Current eligibility criteria for service.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Audited or reviewed financial statement for the fiscal year ended most recently.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. If the program's fiscal year does not end on December 31, enclose an income and expense statement covering the period from the first day of the fiscal year through December 31, 2013.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. Organizational Priorities. Enclose copies of the governing board's resolution establishing priorities (dated July 1, 2012 or later), a description of the priority-setting process, and a list of those consulted in setting priorities.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. An assurance from the corporation's chief executive officer stating that the corporation's contribution from its general unrestricted funds to the program will not be reduced from the previous fiscal year level.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. A roster of board members including affiliations, addresses, and phone numbers.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12. A current organizational chart.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13. A current salary schedule.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14. A list of the qualified legal services projects to which the center provided assistance and a description of the nature of the assistance.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15. A description of the center's advocacy support activities. (See Instructions for Form XI, No. 3.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16. Copies of two communications describing the availability of services sent to every qualified legal services project within the past year.