

# Philadelphia LawWorks

## APPLICATION FOR PRO BONO LEGAL ASSISTANCE

Philadelphia Law Works<sup>1</sup> coordinates referrals to pro bono transactional legal services and provides legal education for eligible non-profit organizations and businesses that benefit low-income persons or communities.

Please review the following information before completing the application.

### **Eligibility**

#### **Non-profit organizations**

To be eligible for free legal assistance:

- a group must be, or desire to become, a nonprofit organization with the primary purpose of engaging in activities that benefit low-income persons or communities or that otherwise benefit the public interest.
- the organization must also be unable to pay for legal services without significant impairment of program resources.

Examples of eligible non-profit organizations include:

- community-based organizations
- social service providers
- community development corporations, and
- faith-based institutions

#### **For-profit businesses**

To be eligible for free legal assistance the owner(s) of the business must meet certain income eligibility criteria<sup>2</sup>. (If you are a low-income business owner, please provide the amount of your income in the appropriate place in the application, and we will determine your eligibility).

In addition, free legal services may be available on a case-by case basis to small businesses which provide essential services or engage in other activities which benefit a low-income person or community, such as child care providers, and which are unable to pay for

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<sup>1</sup>Philadelphia LawWorks is a collaborative project of the Philadelphia Bar Association, Philadelphia Volunteers for the Indigent Program (VIP), Community Legal Services, Inc. (CLS), Regional Housing Legal Services, Inc. (RHLS), the Homeless Advocacy Project (HAP), Philadelphia Legal Assistance (PLA), Philadelphia Volunteer Lawyers for the Arts (PVLA), Public Interest Law Center of Philadelphia, the Senior Citizen Judicare Project, and the legal, clinical programs of the University of Pennsylvania Law School, Temple Law School and Villanova University Law School.

<sup>2</sup>In order to be income-eligible, the owner(s) household income must be 187.5% of poverty.

legal services without significant impairment to program resources.

### Scope of services for all organizations

Philadelphia LawWorks makes referrals to volunteer attorneys for pro bono legal representation on a variety of transactional matters, including, incorporation and application for tax-exempt status, as well as issues involving contract, real estate, tax, employment, and many other areas of the law. While the legal services are free, any out-of-pocket costs, such as filing fees, will be the responsibility of the client.

### Purpose of Application

This application was designed to help Philadelphia LawWorks learn more about your organization and its legal needs. It will also help Philadelphia LawWorks determine whether your organization is eligible for its services. Please fill out the application completely and return it along with the requested attachments. Include any additional information that you think might be helpful, using additional sheets if necessary. It is important that you provide as much detail and be as candid as possible so that Philadelphia LawWorks can evaluate your application quickly and fairly. Philadelphia LawWorks understands that some of these questions may not apply to your organization. For those questions, please write "Not applicable" as your response.

### Philadelphia LawWorks Review Process

The application will be reviewed for eligibility and for the nature of your legal needs. If you are eligible for assistance, the case will then be referred to a volunteer attorney. The referral process can take from two to four weeks or longer.

### Language Access/Accommodations/Assistance

Please note any special needs, such as the use of an interpreter or translator, or accommodations for persons with disabilities. Let us know if you need assistance filling out the application.

### Please submit the application to Philadelphia LawWorks at:

Contact name: Steven L. Grumm  
Organization: Philadelphia LawWorks  
Address: 42 South 15<sup>th</sup> Street, 4<sup>th</sup> Floor  
Phone: 215-523-9562  
Fax: 215-564-0845  
e-mail: lawworks@phillyvip.org

## ORGANIZATION AND CONTACT INFORMATION

Name of Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Fax Number: \_\_\_\_\_  
Web site: \_\_\_\_\_

Name of Contact Person: \_\_\_\_\_  
Position/Title: \_\_\_\_\_  
Work Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
E-mail: \_\_\_\_\_

Who else may be contacted for additional information:

Name: \_\_\_\_\_  
Position/Title: \_\_\_\_\_  
Work Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
E-mail: \_\_\_\_\_

## TYPE OF ORGANIZATION OR SERVICE REQUESTED

Please indicate (/) the description that best matches your organization or need. Check **only** one. THIS IS VERY IMPORTANT!

- a. Non-profit organization: \_\_\_\_\_ Complete Questions 1 - 25
- b. For-profit organization/small business: \_\_\_\_\_ Complete Questions 26 - 44
- c. For-profit organization/small business that only seeks business law information or training<sup>3</sup>. (Please note, by marking here, you are indicating that you currently do not seek the assistance of an attorney for a legal matter.) \_\_\_\_\_ Complete Question Nos. 26 - 31 and 43 - 44 only.

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<sup>3</sup>Philadelphia LawWorks offers business law information and training to for-profit organization/small businesses in low-income communities and associated with commercial corridors, business incubator developments, Empowerment Zones, and Keystone Opportunity Zones.

## NON-PROFIT ORGANIZATIONS

Please note, the next set of questions are to be completed **only** by non-profit organizations as indicated on the previous page.

### ORGANIZATIONAL BACKGROUND AND STRUCTURE

1. Describe the purpose and/or mission of the organization. *(Please attach a copy of the mission statement, if available.):*

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2. Please describe your organization's activities/programs. Attach any brochures, reports, or other documents which describe your organizations activities/programs.

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3. When and how did the organization form?

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4. Is your organization incorporated in Pennsylvania as a non-profit?

Yes  No

**If incorporated, attach a copy of articles of incorporation and bylaws.**

5. If this is a newly formed organization, do you want to incorporate?

Yes  No

6. Has your organization been designated by the IRS as tax-exempt under 501(c)(3) or 501(c)(4)?

Yes  No

**If yes, attach a copy of the IRS determination letter.**

7. How many board members are there in the organization? \_\_\_\_\_

**Attach a list of the board members of the organization and include names, titles, addresses, and phone numbers, and if they are an officer, their title.**

8. How many of the board members are low-income persons<sup>4</sup>?  
No. \_\_\_\_\_ N/A

9. If the organization has a membership, are more than one-half of the members low-income persons or households? \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ N/A

10. Please indicate the number of staff persons: \_\_\_\_\_ Paid \_\_\_\_\_ Volunteer

**Please attach a list of staff position titles.**

11. Please describe (a) the population served, or to be served, by the organization, (b) the geographic area the organization serves or intends to serve, and (c) the number of people it serves or intends to serve. \_\_\_\_\_

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12. Does the organization partner or collaborate with other organizations to accomplish its goals?

**If so, please attach a list of those partner or collaborating organizations and describe the relationship**

### FINANCIAL INFORMATION

13. What is the organization's annual budget? If it is a new organization, what is the projected annual budget? \_\_\_\_\_

14. Does your budget contain a line for legal fees? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If yes, please indicate the amount \$ \_\_\_\_\_

15. Explain why your organization cannot afford to pay for legal services without significant impairment of program resources? \_\_\_\_\_

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**Please include a copy of your organization's annual report or income/expense statement (with a breakdown of income sources and expenses) for the most recent fiscal year.**

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<sup>4</sup>Low-income is defined as household income at 187.5% of poverty.

## LEGAL NEEDS

16. Describe as specifically as possible the legal needs for which your organization seeks assistance. Please attach copies of all related documents such as legal papers, contracts, letters, title documents, project proposals, etc. (**keep originals for your records**). Please note, Philadelphia LawWorks provides only non-litigation services.

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17. Are there any deadlines relating to your request for assistance? If so, list dates and the nature of the deadlines: \_\_\_\_\_

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18. If your organization has a need for general on-going legal advice/counsel, please indicate this and set forth those issues for which your organization needs advice.

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19. Please list the names of all of the other persons and/or organizations involved in the matter for which you seek legal assistance, so that we can be sure to eliminate all conflicts of interest in referring this case. This is VERY IMPORTANT:

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20. Prior legal representation:

a. Has a lawyer worked with your organization before on the problem described above?  
\_\_\_\_\_ Yes \_\_\_\_\_ No

b. If so, what is the lawyer's name, address and phone number?

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c. Why is she/he no longer representing your organization in this matter?

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d. What work did she/he perform?

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21. Are there any attorneys active in your organization who have provided legal assistance to your organization? If so, please list their name(s) and the type of legal work provided:

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22. Other than those already indicated, has the organization ever used the services of other attorneys in the past? If so, please set forth their name(s) and the legal service(s) provided:

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23. Did you pay for any of the legal services in the questions above?

\_\_\_\_\_ Yes          \_\_\_\_\_ No

### MISCELLANEOUS INFORMATION

24. Do you have any special needs such as the use of an interpreter or translator, or accommodations for persons with disabilities?

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25. How did you hear about Philadelphia LawWorks? Referral from another organization, brochure, listing in a directory, other? Please describe:

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### FOR-PROFIT BUSINESSES/ORGANIZATIONS

Please note, the next set of questions are to be completed **only** by for-profit organizations/small businesses as indicated at the beginning of this application.

26. Describe, in detail, the nature of your business:

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27. Are you conducting the business as a (please check one):  
Sole Proprietor\_\_\_ Partnership\_\_\_\_\_ Corporation\_\_\_ Other Entity\_\_\_\_\_

**If you did not check Sole Proprietor, please attach a list of all the other partners or co-owners in the business. Include their names, (title, if any), addresses, phone numbers, and their financial information as requested in questions No. 41 - 43.**

28. When did you start doing business?\_\_\_\_\_

29. What geographic area does the business currently serve? Specify neighborhood(s), county or counties, or region(s)?\_\_\_\_\_

30. Describe the nature of the population served by your business:  
\_\_\_\_\_  
\_\_\_\_\_

31. Does the business collaborate with other organizations/businesses to accomplish its goals?  
\_\_\_\_\_ Yes \_\_\_\_\_ No

**If YES, please attach a list of those partner or collaborating organizations.**

32. Describe as specifically as possible the legal needs for which your organization seeks assistance. Please send copies of all related documents such as legal papers, contracts, letters, title documents, project proposals, etc. **(keep originals for your records)**. Please note, Philadelphia LawWorks provides only non-litigation services.

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\_\_\_\_\_  
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33. Are there any deadlines relating to your request for assistance? If so, list dates and the nature of the deadline:\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

34. If your business has a need for general on-going legal advice/counsel, please indicate this and set forth those issues for which your organization needs advice.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

35. Please list the names of all of the other persons and/or organizations involved in the matter for which you seek legal assistance, so that we can be sure to eliminate all conflicts of interest in referring this case. This is VERY IMPORTANT:

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36. Prior legal representation:

a. Has a lawyer worked with your organization before on the problem described above?  
\_\_\_\_\_ Yes \_\_\_\_\_ No

b. If so, what is the lawyer's name, address and phone number?

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c. Why is she/he no longer representing your business in this matter?

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d. What work did she/he perform?

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37. Are there any attorneys active in your organization who have provided legal assistance to your organization? If so, please list their name(s) and the type of legal work provided:

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38. Other than those already indicated, has the organization ever used the services of other attorneys in the past? If so, please set forth their name(s) and the legal service(s) provided:

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39. Did you pay for any of the legal services described in your answers to the questions above?  
\_\_\_\_\_ Yes \_\_\_\_\_ No

**FINANCIAL INFORMATION: FOR-PROFIT BUSINESSES/ORGANIZATIONS**

Please note, your application will not be considered without the following financial information. Additionally, if there are partners or co-owners, their answers to these questions must also be included.

40. What is the gross annual income from all members of your household?

\$ \_\_\_\_\_

41. How many people are members of your household?

\_\_\_\_\_

42. What is the source of your income? \_\_\_\_\_

**Please attach individual tax returns for the most recent 3 years for yourself and all persons with an ownership interest in this business.**

43. Do you have any special needs such as the use of an interpreter or translator, or accommodations for persons with disabilities?

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44. How did you hear about Philadelphia LawWorks? Referral from another organization, brochure, listing in a directory, other? Please describe:

\_\_\_\_\_  
\_\_\_\_\_

## CHECKLIST

Please include as many of the following documents with your application as you can. Additionally, enclose any other documents that you believe may be helpful in assisting Philadelphia LawWorks assess your application.

- Copy of Articles of Incorporation
- Copy of Bylaws
- Copy of IRS 501(c) Letter
- Copy of Mission Statement
- List of Board members w. affiliation, address, phone and whether an officer
- List of Staff Position Titles
- List Partners/Collaborators
- Copy of Annual Budget or Income/Expense Statement
- Copies of all documents related to the organizations specific legal problem(s)
- Tax Returns for the most recent 3 years (for-profit/small business applicants only)

## AUTHORIZATION TO RELEASE INFORMATION

Application Information: I hereby authorize Philadelphia LawWorks, its collaborating organizations and their agents and employees, to verify, disclose and make copies of any and all information provided in this Application in the course of determining eligibility and in securing a volunteer attorney.

Release: I hereby release any person or entity complying with this Authorization from any and all claims relating to the disclosure of any such information and documents.

Validity: A copy of this Authorization shall be as valid as the original.

The undersigned, hereby certifies that all of the information in this application is true and accurate and that he/she is authorized by the above organization to submit this application to Philadelphia LawWorks. The applicant further agrees to notify Philadelphia LawWorks in the event of any changes and understands and agrees that Philadelphia LawWorks must review this information with a panel of volunteer attorneys in order to evaluate the organization's eligibility for its services.

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_