

Pennsylvania Bar Insurance Fund and Trust Fund Unveils New Process/Timeline for Requesting Grants

There are two funds from which grants can be given – the Trust Fund and the Insurance Fund. The Pennsylvania Bar Trust Fund is a charitable arm of the PBA. It considers grant requests that "promote educational and charitable purposes associated with the legal profession and the administration of justice with particular reference to the promotion of such purposes in the Commonwealth of Pennsylvania."

The main function of the Pennsylvania Bar Insurance Fund is to assure the quality and character of insurance programs offered to PBA members. It considers grant requests for programs that are designed to help reduce the incidence of malpractice and to provide loss control programs that will help lawyers practice better and have fewer incidents of malpractice.

At its meeting on February 4, 2011, the Trustees of the Pennsylvania Bar Insurance Fund and Trust Fund unanimously approved a new timeline (see below) for its grants process.

Deadline	Task
April 1 st	Grant requests for the current calendar year and supporting documentation are due from organizations.
April – June	The Grants Committee reviews and evaluates grant requests received by the April 1 st deadline and makes recommendations to the Trustees.
June	The Trustees consider the recommendations of the Grants Committee at its June meeting.
July 1 st	Grant applicants are notified of the Trustees action and provided with the payment request forms.
December 1 st	Grant applicants must have spent the funds and requested payment from the Trustees no later than December 1 st .

A significant change in the grant process is that all grant projects must be completed and the grant funds expended by December 1st in the year they are awarded. There will no longer be a status review and possible continuation for grant funds not expended.

Grant projects not completed and grant funds not expended by December 1st will automatically be canceled as of December 1 and the unexpended grant amount will revert to the Fund from which they were granted. Grant applicants may make a new request in the next calendar year for the same project, with the understanding that carry-over projects will not receive priority. Grant applicants are strongly encouraged to thoroughly plan the project so that the grant funds are expended by December 1st.

While there is no formal grant application to complete, requests must contain information relating to the purpose of the grant, benefits derived, population to be served and the amount requested supported by a detailed budget. This is necessary to determine whether the grant meets the objectives of the Trust Fund or the Insurance Fund. The application should also establish the fact it is a "seed money" request for the commencement of a new project, except for Trust-sponsored programs.

Grant Refund Policy

The Trustees of the Pennsylvania Bar Insurance Fund and Trust adopted the following policy relating to grants by either the Pennsylvania Bar Trust Fund or Pennsylvania Bar Insurance Fund at their April 17, 1999 meeting:

In the event of the sales materials developed or produced with the use of funds from a Pennsylvania Bar Insurance Fund grant or a Pennsylvania Bar Trust Fund grant, all proceeds of the sales, after deduction of actual reproduction costs of the materials sold, shall be refunded to the Fund making the grant provided that:

- a. The amount of any total refund shall not exceed the total amount of the grant,
- b. This policy shall be applicable to all grants approved on and after April 15, 1999, unless otherwise specifically provided in the specific grant, and
- c. This Resolution does not address other types of reimbursements, which will be reviewed on a grant by grant basis.

Grant requests should be forwarded to PBA Governance Manager Sandra L. Graver. Please contact Ms. Graver should you have any questions about the new grants timeline/process (email – sandra.graver@pabar.org).