The Final Report on your 2018/2019 IOLTA grant will assist the MBF to evaluate the programs it supports and to determine the impact of these programs within their client communities.

The narrative of your report should follow the outline below and should not exceed three (3) pages with one inch margins and 12 point font size. Please write concisely. You are welcome to submit the required information in bulleted form.

For your report to be considered complete, Final Statistics, Final Budget, and Grantee Questionnaire forms must be submitted along with the narrative. The forms are available online at www.MassBarFoundation.org.

If you have any questions, please contact Beth 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, 2018 - August 31, 2019

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 — Please describe:
   - the progress made during the grant period, referring to the goals and objectives in your application (or any revisions submitted subsequent to the grant award)
   - specific program outputs (services you provided to the client, e.g. full representation, brief service; providers of services: staff attorneys, pro bono attorneys, or advocates; types of cases; training, etc.)
   - specific program outcomes (what happened to the client as a result of your services, e.g. abuse prevention order secured, client allowed three months to find another apartment, client’s benefits were reinstated, two additional pro bono attorneys took cases, etc.)
   - how your program measures success (and partial success if applicable) related to outcomes mentioned above
5. **Collaboration** — Please describe any 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 grant period. Describe your efforts to overcome them.

8. **Future of the Program** — Please describe the strategy you are implementing to ensure the sustainability of this project beyond the grant period.

9. **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.

10. **Final Statistics Form** — Do not use percentages on this form. For those programs that provide representation using Limited Assistance Representation (LAR) agreements, please indicate the number of cases that you opened that included an LAR agreement. For the purposes of this report, we define LAR as follows:

    “Limited Assistance Representation (LAR) is when an attorney represents or assists a litigant with part, but not all, of his or her legal matter, instead of the standard full representation on an entire case. With LAR, litigants can engage an attorney for part of the case—a crucial event, like the case management conference or a motion to dismiss—without the costs of full representation. The attorney and litigant enter into a detailed agreement defining what tasks the attorney will be responsible for and what tasks the litigant will be responsible for.”


**Note for ADR Programs:**

Please be sure to elaborate what stage the parties are in (referral/intake, mediation, agreement) when referring to “cases” in your report. For the final statistics form, please follow these guidelines:

- **Cases Opened** = all conflicts/cases referred to program.
- **Cases Closed** = however your program decides when a case is closed, either because of inaction or after mediation/conciliation has concluded.
- **Of Cases Closed, Brief Service** = those cases that closed without having gone to mediation/conciliation.
- **Of Cases Closed, Full Representation** = those cases that closed after participating in mediation/conciliation.

11. **Final Budget Report Form** — Be sure to complete the Additional Funding Sources section of this form, if applicable.
12. **Grantee Questionnaire** — This form must be completed, even if you are not requesting to carry over funds. Your report will not be considered complete without this form.

Please submit your Final Report (hard copy format only, not electronic), along with two (2) additional copies, to:

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