



2021-2022 REQUEST FOR PROPOSALS

Release Date: Friday, February 19, 2021

Due Date: Noon, Monday, April 12, 2021

LATE SUBMISSIONS WILL NOT BE ACCEPTED

Grant Period: July 1, 2021 – June 30, 2022 (12 Months)

Amount to be awarded: Approximately \$700,000

Introduction

The State Bar of New Mexico Access to Justice Fund Grant Commission (“Grant Commission”) seeks applications from nonprofit organizations that provide civil legal services to low-income New Mexicans consistent with the current [State Plan for the Provision of Civil Legal Services to Low-Income New Mexicans](#) (“State Plan”). The Commission will consider applications for both new and on-going projects. Upon review of the applications, the Grant Commission will make the final decision regarding applicants and amounts to be awarded.

Vannessa Sanchez is the State Bar point of contact for obtaining application materials, questions regarding the application process, and application submission. Vannessa can be reached at:

State Bar of New Mexico, Attn: Vannessa Sanchez, PO Box 92860, Albuquerque, NM 87199
vsanchez@sbnm.org

Information and forms referenced by this Request for Proposals (RFP) can be found at
<https://www.sbnm.org/Leadership/Commissions>.

Eligibility

Eligible Access to Justice Fund Grant applicants must be either:

- 1) A nonprofit organization with a current or pending 501(c)(3) status that:
 - a) Has as its primary mission the delivery of legal services to low-income persons.
 - b) Provides services using one or more of the service delivery methods identified in the current State Plan.
 - c) Employs (*not* contracts with) at least one full-time attorney who devotes at least 75% of his or her time to representation of low-income persons.

OR

- 2) Is an in-house legal department within a larger nonprofit organization with current or pending 501(c)(3) status that meets criteria (a), (b), and (c) above.

Criteria

- 1) Applications should be for the 12 month grant period.
- 2) Applications should be consistent with the current State Plan.
- 3) Persons to be directly served or benefited must have household incomes of 200% or less of the federal poverty level, with most of the persons served or benefited having household incomes of 125% or less.
- 4) Priority will be given to proposed projects that take the following into consideration:
 - Projects that significantly increase the number of eligible persons served or benefited.
 - Projects that address the needs of priority client groups or the substantive issues identified in the State Plan will be favored, but the Grant Commission will consider applications serving any eligible client group.
 - Requests for administration and overhead costs should not exceed the proportion of the applicant’s total administration and overhead costs directly attributable to the funds granted (e.g., if the amount requested constitutes 3% of an applicant’s funds from all sources, the requested administrative and overhead costs should not exceed 3% of total administrative and overhead costs.) Equipment essential to the success of the proposed project might also be approved.
 - Projects that address clients’ complete needs for legal services, rather than simply one part of that need are strongly preferred (e.g., applications to assist victims of domestic violence that propose to limit assistance to

obtaining Orders of Protection, would not be favored. Alternatively, applications that propose to provide full representation to a domestic violence victim would be appropriate.)

- Integrated approaches are preferred (e.g., a planning grant from three providers was funded to develop an approach for assisting recent immigrants.) The Grant Commission recommends funding of planning grants that will produce an integrated approach to complex problems. Applicants seeking funds for activities similar to those conducted by other eligible organizations should consider submitting a joint application.
 - Projects that will make services available throughout the state, and in rural areas, will be favored.
- 5) There is no preference for on-going or new projects. Receipt of funding for a previous project does not guarantee continued funding.
 - 6) Applicants may propose sub-contracts to other organizations and/or contracts with private attorneys. Applicants proposing sub-contracts, not the sub-contractor, will be responsible for completion of all proposed services on time and within budget.
 - 7) Out of state providers may apply for grant funding as long as the funding will be used to serve New Mexico residents. Please note that projects from in-state providers that provide the same or similar services to those proposed by an out-of-state provider will be given preference. Out-of-state providers should clearly explain why the proposed services are not otherwise available within the state.

Process

The Grant Commission consists of three members designated by the Supreme Court, three members designated by the State Bar, three members designated by the New Mexico Commission on Access to Justice and an ex officio position held by the chair of the New Mexico Legal Services Commission. No commissioner may be associated with any applicant.

Applications will be received by the State Bar of New Mexico and eligible applications will be reviewed by the Grant Commission. The Grant Commission will discuss each of the applications individually and give consideration to (i) the priority under the State Plan (pp 40 – 44) of the proposed service, including the target clientele, the substantive legal areas, and the geographic area(s) to be served; (ii) the extent (State Plan pp 32 – 39) of the legal services provided with preference for direct representation addressing clients' complete legal needs; (iii) the number of clients served in relation to the amount of the request; (iv) the clarity and reasonableness of the project budget; (v) coordination with other providers and use of volunteers (State Plan 52 – 60); (vi) for ongoing projects, effectiveness and success to date; (vii) the services offered by other civil legal service providers and whether there is duplication of services within the same geographical area; and (viii) for new projects, clarity and completeness of plans and likelihood of success.

The Grant Commission will make the final decision regarding applicants to be approved and the amounts to be awarded. The Grant Commission may determine that a project is not ready for full "new project" funding and instead, award a planning grant. Successful applicants and amounts awarded will then be announced and 12-month grant agreements will be negotiated by the State Bar. Grant agreements will begin on July 1, 2021.

Application Process

Applications are due no later than
Noon, Monday, April 12, 2021

LATE APPLICATIONS WILL NOT BE ACCEPTED

A. Intent to Apply

If your organization intends to apply for an Access to Justice Fund Grant, send an email to Vanessa Sanchez at vsanchez@sbnm.org and provide: 1) a statement of intent to apply, 2) the organization contact person and 3) his/her email, telephone number and mailing address. Vanessa will respond by email acknowledging receipt of the intent to apply and provide the application materials.

Upon notification of a statement of intent to apply, prospective applicants will receive application materials and any further instructions, copies of all of the questions asked by potential applicants and the question responses.

Submitting an "Intent to Apply" does not obligate your organization to submit an application, but you should notify Vanessa by email if you decide not to apply.

B. Application Materials

Application materials include: 1) cover page*; 2) signature page*; 3) narrative; 4.) statements of work; 5) project budget detail*; 6) project budget summary*; and 7) financial statement.

**See Appendix A for sample documents.*

If funds are being requested for more than one project, separate and complete applications must be submitted for each project. **NOTHING ELSE:** no appendices or attachments, *unless* you propose to use subcontractors. In that situation, attach a copy of your proposed contract(s). If the Grant Commission needs additional information, the organization point person will be contacted by Stormy Ralstin, State Bar General Counsel.

C. Preparing the Application

Write the narrative first (detailed instructions below). Assume that members of the Grant Commission know that there are low-income people with legal needs and skip discussion of this. Focus on: **1) the population and legal needs you intend to serve; 2) the scope of the services you will offer to meet the needs of your clients; 3) the results you expect to achieve and how your clients will benefit from your services; and 4) how the project fits within the scope of the State Plan.** When complete, your narrative should communicate a clear and complete description of your project sufficient to enable the Grant Commission to understand and appropriately evaluate your application.

Complete the budget forms (see below). If using subcontractors, show the amounts that the applicant and each subcontractor will receive on the bottom table on the Budget Summary form.

Prepare the Cover page. Condense the narrative to fit the space available. This will be the reviewers' first impression of your proposal—condense with care. Then complete the rest of the form.

Finally, complete and sign the Signature page.

1. Cover Page

The cover page contains a summary of the information detailed in the narrative. This form is an Adobe Acrobat template with fillable fields.

Here are some tips for completing the cover page:

You may find it easier to write the project summary using a word-processing program, and then copy and paste the text in the box. Note that, if your text needs more space than is allowed on the form, the form will shrink the font size. If this happens, shorten your text so it will appear in at least 12 point font on the form. Before printing the form, make sure that the box containing the project summary has not pushed the bottom of the cover page onto a second page. If it has, shorten your project summary so that, when printed, the cover page is fully contained on one page.

2. Signature Page

The signature page contains assurances. This form is an Adobe Acrobat template with fillable fields.

3. Narrative

Provide the following information, in the order shown, **(No more than 6 single spaced pages in 12 point font or larger, and ½ inch margins)**. Follow the instructions for an on-going project, a new project or planning grant **(choose one)**.

On-Going Project

- a. *Prior Activities and Results:* **Briefly** describe what your project has done (who has been served and typical activities) and what it has accomplished since its inception. Show the number of people directly served (in an attorney/client relationship, attending seminars or other events, or helped using one of the legal methods in the State Plan) in the most recent 12-month period for which information is available *and* the number of people benefited (that is, directly and indirectly having benefited from the services provided to person(s) directly served). If you propose to continue an educational project (e.g. training low-income persons to represent themselves or their families), describe as precisely as possible what attendees did as a result of the training.
- b. *Proposed Activities:* Describe the scope of the services you intend to provide -- what you will do for and with the people to be served. Be sure to describe how the project will be coordinated with other legal aid providers and social services organizations. If subcontractors will be used, describe the role of each participating organization.
- c. *State Plan:* Describe how your project fits within the priorities of the State Plan for populations and substantive legal areas served.
- d. *Monitoring and Evaluation:* Describe how you will know that the project is proceeding as planned. Describe how you will measure the success of the project. Describe how the project is unique/necessary in light of other providers in this area.

- e. *Manager(s)*: Name the person(s) who will manage your project and briefly describe their qualifications to manage this particular project.
- f. *Staff*: Name the person(s) who will staff your project and briefly describe their qualifications. If the staff for your project has not been hired, show the expected date for hiring on your timeline (see below).
- g. *Volunteers*: Briefly describe how volunteers will be used for your project. Name the person who will recruit and supervise volunteers. Describe how your organization will get pro bono volunteer attorneys involved in the project or organization in general. If you do not intend to use volunteers, explain why.
- h. *Training and Support*: Describe when and how training will be provided to managers, staff and volunteers. Briefly describe the source of any professional support to be provided.
- i. *Timeline*: Show, either as a graph or a series of statements, the dates when key parts of your proposed project will begin and end.

New Project or Planning Grant

- a. *Need*: Describe who will be served, their legal needs, why services for this group are needed, what priorities and aspects of the State Plan your project will serve that are not being currently adequately addressed.
- b. *Activities*: Describe the scope of the services you intend to provide -- what you will do for and with the people to be served. Describe how the project will be coordinated with other legal aid providers and social services organizations. If subcontracts will be used, describe the role of each participating organization.
- c. *Monitoring and Evaluation*: Describe how you will know that the project is proceeding as planned, how you will measure the success of the project, how the project is unique/necessary in light of other providers in this area.
- d. *Manager(s)*: Name the person(s) who will manage your project and briefly describe their qualifications to manage this particular project. If the managers for your project have not been hired, show the expected date for hiring on your timeline (see below).
- e. *Staff*: Name the person(s) who will staff your project and briefly describe their qualifications. If the staff for your project has not been hired, show the expected date for hiring on your timeline (see below).
- f. *Volunteers*: Briefly describe how you intend to use volunteers for your project. Name the person who will recruit and supervise volunteers. Describe what your organization is doing to get pro bono volunteer attorneys involved in the project or organization in general. If you do not intend to use volunteers, explain why.
- g. *Training and Support*: Briefly describe when and how any needed training will be provided to managers, staff and volunteers. Briefly describe the source of any professional support to be provided.
- h. *Timeline*: Show, either as a graph or a series of statements, the dates when key parts of your proposed project will begin and end.

4. Statement of Work

Successful applicants will receive a grant agreement from the State Bar of New Mexico which administers the Access to Justice Fund. Each grant agreement will include one or more “statements of work” to be accomplished during 2021-22 grant period. At the end of your application narrative please include the following two statements (These statements **will not** count against the six page limit of the narrative):

1.) Statements of Work to be Accomplished

In this part of the narrative, write statements of work that you would like to see in your grant agreement. These statements are typically accepted by the Grant Commission and/or the State Bar, but they may be changed in grant agreement negotiations.

Typically, statements (numbered, if more than one) use the following format:

(Verb or verb phrase) (number) (kind of low-income persons or groups served) (strategy to be used) producing (numbers) (low-income persons benefitted).

For example: "Continue the on-going consumer protection project by providing direct representation to 25 rural families that have been illegally harassed by bill collectors. The project will benefit 75 persons directly, and all the residents of the communities where a low-income person is represented by reducing the incidence of illegal bill collection practices."

If you are a successful applicant, the wording of these statements will be negotiated before you sign your grant agreement.

2.) 2021 Revised Statements of Work to be Accomplished

The Grant Commission typically receives grant applications for much more than the amount of grant funds available. This means that the amounts requested by successful applicants are often cut, sometimes by 50% or more. In this section of your narrative, answer the following questions:

- If the amount you request for your project is significantly reduced, will the project still be viable?
- How will the scope of your project be affected by a 50% cut in funds requested?

If funds awarded are significantly less than the amount requested, you will be asked to rewrite your proposed statements of work to reflect reduced funding.

Note that, once your grant agreement is signed, a change in any statements of work to be accomplished or in your contracted budget must be approved by the Grant Commission.

5. Project Budget Detail

Prepare a draft line item budget using the "Project Budget Detail" Excel document provided or any other form that covers the same budget items. This budget detail should cover *only the new or ongoing project budget*, for which you are applying for grant funding, and should *not* be comprehensive of your organization as a whole. You do not have to justify every cost, but, if you are concerned that a cost may be questioned, err on the side of providing more, rather than less, information.

6. Budget Criteria and Considerations

Once the draft line item budget is prepared, take an objective look at the proposed costs using the following checklist as an internal tool. Do not include responses to the following in your application. Please note that these are aspects that the Commission strongly considers when making a decision:

- ☐ Given your narrative's description of work to be accomplished, is the cost reasonable?

- ☐ What other grants/funding sources has the project received? What services are these other sources funding?
- ☐ If the project will be supported by funds from the Grant Commission and other sources, have you clearly identified the respective costs to be paid by each grant source?
- ☐ If you requested funds to cover administrative and overhead costs, is the percent of administrative and overhead costs requested in this application equal to (or less) than the percent of administrative and overhead costs charged on funds from all other sources?
- ☐ Are staff salaries and wages comparable to those of other legal services organizations in New Mexico? If higher (or lower), can they be justified?
- ☐ Is health insurance being provided to all staff assigned to your project? If yes, have you shown the percent of total premiums paid by the employer in the space provided? If health insurance is not provided by the employer, have you explained why in the justification section?
- ☐ Is the cost of other employment benefits reasonable?
- ☐ Have you requested funds for purchase of equipment? If yes, use the justification section to explain why these costs are essential to the production of the project's goal and why there are no other sources of funds that could be used to cover these costs.
- ☐ Is a contingency plan in place to retain as much of the proposed project as possible if the requested amount is cut?

7. Project Budget Summary

Once you are satisfied with the answers to the above questions, transfer the numbers to the "2021 Project Budget Summary" form. While you may use any form for your line item budget, you *must* use the "2021 Project Budget Summary" form to show your budget on one page. The total on your Cover Page must match the totals on your Budget Detail and Budget Summary.

Use the justification sections in the Budget Detail form (or a brief memo) to explain any costs that a reviewer might question, such as the examples above.

8. Financial Statement

Finally, current or most recent financial statements for your organization must be submitted along with your application. Applicants should submit their most recent audited financial statements if the organization is audited and, if not, the unaudited financial statements for the most recent fiscal year after all year-end adjustments have been made.

D. Meeting with Commission

Following the submission deadline, applicants will be provided with a meeting time. Meetings will take place between 8:00 a.m. and 5:00 p.m. on Wednesday, May 19, 2021 via Zoom and will last 10-15 minutes. It is not required that your organization's Executive Director be present – a staff member who is familiar with your project and application may attend in lieu of the Executive Director.

Applicants may be asked to briefly answer questions from the Grant Commission regarding the proposed project's goals, objectives, budget, etc. In planning for your meeting, please consider the following questions:

- The Commission may perceive that your project duplicates services available from other providers in your service area. If so, why do you believe your services are not duplicative?
- If grant funding is cut significantly from the amount requested in your application, how will you ensure that the project can still be successful?

The Grant Commission may also conduct independent research on any applicant.

Application Submission

Vannessa Sanchez is the State Bar point of contact for questions regarding the application process and for application submission. Vannessa can be reached at:

State Bar of New Mexico, Attn: Vannessa Sanchez, PO Box 92860, Albuquerque, NM 87199
vsanchez@sbnm.org

If you encounter any problems when submitting your application, email Vannessa before 10:00 a.m. on Monday, April 12, 2021.

To Submit an Application

1. Prepare an email with the subject: *[short name of organization] 2021 ATJ Fund Grant Application*, attach application file(s) using the format below, then send the email to Vannessa; and
2. Mail original cover page and signed signature page to Vannessa

Applications must be submitted as:

1. **A single .pdf file.** You can do this by printing and scanning into a single .pdf file.
OR
2. **Hand deliver** your printed application to Vannessa Sanchez at the State Bar Center in Albuquerque. Contact Vannessa in advance to schedule your drop off.

If submitting an application by email, Vannessa will reply to acknowledge receipt. If you do not receive this acknowledgment, your application was likely not received. Following the submission deadline, applicants will be provided with a meeting time.