



NORTH CAROLINA
IOLTA

2025 NC IOLTA Grants

Guidelines and Application Instructions

Grant period: January 1 – December 31, 2025

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I. Background

NC IOLTA's Mission:

To improve the lives of North Carolinians by strengthening the justice system as a leader, partner, and funder.

NC IOLTA's Vision:

A North Carolina where all people can effectively meet their legal needs.

About NC IOLTA

North Carolina Interest on Lawyers' Trust Accounts, NC IOLTA, was created in 1983 by the North Carolina State Bar and approved by the North Carolina Supreme Court to collect interest earned on lawyers' general pooled trust accounts to fund programs for the public's benefit.

NC IOLTA provides access to justice by funding high-quality legal assistance. Due to limited resources and insufficient funding, just a fraction of North Carolinians have access to the critical legal services they need to thrive. By working directly with lawyers and financial institutions across the state to set up interest-bearing trust accounts, NC IOLTA has awarded more than \$120 million to organizations that help provide legal aid to individuals, families, and children.

Civil legal aid plays a critical role in building a legal system that works for everyone, breaking down long-standing barriers to equity and creating strong communities across North Carolina. By working toward equitable access to civil legal aid, we at NC IOLTA are creating a North Carolina where all individuals, families and children can fairly navigate the justice system to have their basic needs met and their rights protected so they can thrive.

Together we are working to build strong, equitable communities across North Carolina. With your partnership, we can expand the impact that we are having on North Carolina's communities everywhere.

NC IOLTA Strategic Plan

In January 2021, NC IOLTA initiated a strategic planning process to create a clear road map to guide IOLTA's work in the coming years, consistent with the program's founding principles and building upon achievements made since inception. The Executive Committee of the board led the process, with the participation of the full board and staff and the support of consultants Stephanie Choy and Lonnie Powers. The process also included 19 stakeholder interviews and a community forum for feedback on the draft plan. The board approved the strategic plan on June 23, 2021. NC IOLTA looks forward to working with you and other stakeholders to pursue our shared goals in the coming years.

A summary of the strategic plan's primary objectives is included as an attachment toward the end of this document. The full plan can be found at www.nciolta.org.

I. Background

NC IOLTA Values

Integrity: Our organizational policies and practices – including financial management, grantmaking, community leadership, and decision making – engender trust from stakeholders.

Stewardship: We ensure funds received from any and all sources are used effectively and efficiently to make improvements in the quality of justice, with a focus on civil justice. This includes optimizing investments in grantmaking, maintenance of reserves, and fiscally responsible budgeting.

Equity: We apply an equity lens to all our work. We pursue equity through an inclusive process with diverse voices with a view to ensuring that investments support access to legal services for all persons and communities regardless of race, color, ethnic identity, national origin, sexual orientation, geography, age, gender identity, gender, disability, immigration status, lack of income or wealth, or religious beliefs.

Leadership: As a funder, we have a unique role within the civil justice community and the Bar to work towards improvement of the justice system. We lead by example, using our voice and knowledge where appropriate to educate and add value to the justice community and other conversations about needs and the issues impacting underserved communities.

Partnership: We bring the justice community together: we recognize that the whole is greater than the sum of its parts, and the community is stronger working collaboratively with each other to utilize individual and collective strengths, appreciate diverse perspectives, and jointly problem solve. We seek to deepen our partnerships not only with legal aid organizations and statewide justice partners, but also financial institutions, foundation funders, law schools, the private bar, and corporations.

II. Grant Eligibility, Programs, and Criteria

Eligibility

In order to be eligible for an IOLTA grant, an organization:

- (1) must be exempt from taxation under Section 501(c)(3) of the United States Internal Revenue Code, as amended; or
- (2) must agree to use the IOLTA grant only for purposes that are charitable or educational within the meaning of Section 501(c)(3) of the United States Internal Revenue Code, as amended.

North Carolina IOLTA grants, awarded under any grant category, must be used to provide services and/or support efforts that benefit North Carolina residents.

Per the administrative rules, NC IOLTA is prohibited from funding the private interests of the legal profession.

Additional eligibility information for particular Grant Programs can be found in the program description for that program.

Grant Purposes

NC IOLTA currently awards grants under two of the grant purposes identified in the rules governing NC IOLTA, Section .1300 of the Governing Rules of the North Carolina State Bar codified in Chapter 1 of Title 27 of the North Carolina Administrative Code.

The two grant programs are:

- (1) Civil Legal Aid Grant Program
- (2) Administration of Justice Grant Program

II. Grant Eligibility, Programs, and Criteria

Civil Legal Aid Grant Program

Grant Purpose

NC IOLTA's Civil Legal Aid Grant Program provides general support for a network of organizations, including both civil legal aid organizations and other agencies that provide civil legal aid, that together provide basic access to the justice system for indigent people residing in every county in North Carolina. Civil legal aid includes direct representation of eligible clients and client groups as well as related training and technical assistance. An organization or program may be providing services through staff attorneys and advocates or using volunteer lawyers on a pro bono basis.

Areas of Funding

- **Civil Legal Aid Grants.**
 - **General Civil Legal Aid Grants** are offered to legal aid organizations, defined as a non-profit organization under Section 501(c)(3) of the Internal Revenue Code whose primary purpose is to provide civil legal aid to low-income clients. General Civil Legal Aid Grants are intended to provide general programmatic support to civil legal aid organizations to broadly support legal services for eligible clients.
 - **Project Support Grants** are offered to legal aid organizations or other entities that run legal aid programs (such as social service providers, advocacy organizations, and other nonprofits that provide other non-legal services in addition to the legal services provided). Project Support Grants are intended to support programs focused on particular client subgroups or particular types of client services, especially where the clients served are not being reached or the program offers services that are not otherwise available through civil legal aid organizations.
- **Pro Bono Support Grants.** Pro Bono Support Grants are offered to support the development and expansion of efforts to engage lawyers and other legal professionals in the provision of voluntary legal services. Note that a pro bono program that does not focus their efforts specifically on indigent clients is not eligible for a Pro Bono Support Grant under the Civil Legal Aid Grant Program but may apply under the Administration of Justice Grant Program.
- **System Support Grants.** System Support Grants are offered to support efforts to improve the system of the delivery of civil legal aid by increasing program efficiency, effectiveness, and collaboration. Examples of some efforts within this area of funding include training, research and evaluation, program innovations, website development or updates, online platforms or tools, and planning and sustainability efforts.

Applicants may apply for more than one Civil Legal Aid Grant.

II. Grant Eligibility, Programs, and Criteria

Eligibility

In addition to meeting the stated eligibility for all NC IOLTA grants, to be eligible for funding from NC IOLTA under the Civil Legal Aid Grant Program, applicants must meet the following requirements:

- 1) **Serve North Carolina residents who are indigent**, defined as individuals who are at or below 200% of the federal poverty guidelines or who are eligible to receive public assistance through a government program for the indigent. In addition to income, programs may consider other relevant factors in determining financial eligibility for services, including access to liquid assets, fixed debts and obligations, and family size for example.

The organization may also consider availability of income, i.e., whether the individual seeking assistance has direct and unfettered access, without having to obtain the consent or cooperation of another person over whom the individual does not have control and who does not in fact consent or cooperate.

If an organization uses a definition of indigent or low-income clients, for all or a portion of its clients that is different from the above, it must be able to show that a majority of its clients fall within the stated NC IOLTA definition.

- 2) **Provide services without charge to the client.** An organization will not be disqualified from receiving funds from NC IOLTA for charging nominal fees as long as the organization allows for the complete waiver of fees in cases where clients cannot pay the fee. The Board reserves the right to approve grants to an organization charging significantly reduced fees in areas of law where services are otherwise unavailable to low-income clients.

Grantees that charge fees, whether nominal or reduced, are required to provide a copy of their client fee policy and schedule to NC IOLTA and include information on fees received in their regular financial reports to NC IOLTA, including information about the number of fee waivers provided to clients.

Funding Criteria

Preference generally will be given to requests from applicants:

- Providing direct representation of clients or client groups, including engaging in a range of services from extended representation to brief advice offered through a variety of methods, offering community legal education to clients, and supporting community economic development through services to client groups;
- Who are staffed civil legal aid organizations, as the most effective and efficient means by which to deliver high quality legal assistance to the poor, including pro bono efforts as an important supplement to staffed legal services;
- Who are current qualified providers over additional, separate programs except where a separate program can address client needs more effectively and efficiently;
- Having diverse funding sources;

II. Grant Eligibility, Programs, and Criteria

- Cooperating in the statewide coordination of delivery of civil legal aid, for example, through participation in geographic or practice area collaboratives, participation in the NC Equal Justice Alliance (formerly known as the NC Legal Services Planning Council) and, in areas with multiple providers, undertaking cooperative efforts as appropriate;
- Responding to the most critical legal needs and identified gaps, for example as documented in legal needs assessments or other studies;
- Developing innovative client service techniques and evaluating their effectiveness and efficiency.

II. Grant Eligibility, Programs, and Criteria

Administration of Justice Grant Program

Grant Purpose

NC IOLTA's Administration of Justice Grants provide support for programs seeking to improve the administration of justice in North Carolina.

Areas of Funding

A goal of NC IOLTA is to focus grants in areas where they can have a measurable impact. Therefore, IOLTA grants for improvements in the administration of justice are made in the areas outlined below with emphasis on how the justice system can operate more effectively and expeditiously.

- Improvement in the operation and management of the justice system;
- Public education and understanding about the law, including law-related education;
- Promotion and support for a full range of dispute resolution techniques and alternatives;
- Promotion and support for public interest legal representation.

NC IOLTA reserves the right to consider or seek out projects in these or other subject areas related to improving the administration of justice in North Carolina.

Note: Administration of Justice Grants must initially be approved by the NC Supreme Court.

Funding Criteria

Preference will generally be given to:

- Applicants seeking start-up funds or seed money for new projects or programs;
- Programs that seek to offer services to individuals who do not qualify for civil legal aid based on their income but who are unable to afford legal assistance, including pro bono programs;
- Programs with demonstration value or replication potential;
- Programs that will have statewide significance; and/or
- Requests for matching funds.

Administration of Justice Grants typically do not fund:

- Direct service programs (e.g., counseling);
- Replicas of established programs;
- Local community groups unrelated to the practice of law;
- Programs (or budget items) for which there is a governmental responsibility to provide funding; and
- Continuing program support for local projects that exceed three years.

III. Grant Application Information

General Information

NC IOLTA manages the grant application and reporting process through an online grants portal called WebGrants. Applicants must use the portal to complete and submit applications for funding from NC IOLTA. The portal is also used for grantees to submit periodic financial and narrative reports.

Applicants can access the portal at <https://nciolta.dullestech.net>. You must first establish an account. More information about using the WebGrants portal can be found in the attachments.

Please contact Dan Labarca (dlabarca@ncbar.gov) with any questions regarding WebGrants.

Application Requirements

The NC IOLTA application requests the following information. This pertains to all requests, with the exception of System Support Grants.

- (1) Organizational overview, including mission and primary activities.
- (2) Organizational activities, including significant accomplishments.
- (3) Caseload data.
- (4) Staff full-time equivalents (FTE).
- (5) Brief overview of equity efforts.
- (6) Client story or impact narrative.
- (7) *Pro Bono Addendum (for Pro Bono grants only)*
 - i. *Staffing*
 - ii. *Case Data*
- (8) Budget.

Required attachments:

- (1) Officer and board member list.
- (2) Board meeting dates.
- (3) Organizational by-laws.
- (4) IRS determination letter.
- (5) Client intake forms.
- (6) Fee policy (if applicable).
- (7) Audit, financial statement, and/or annual 990 document.

III. Grant Application Information

2025 Grant Priorities

NC IOLTA uses the current year's income (i.e., 2024) to distribute as grant funds in the following year (i.e., 2025). Due to the variable nature of this income, which depends on both interest rates and general economic activity, we are mindful that changes in this environment, including sometimes unpredictable and/or abrupt changes, can have serious consequences on both NC IOLTA's income and grantmaking abilities.

As one of our core values, we strive to be responsible stewards of NC IOLTA funds. This includes an effort to optimize investments in grantmaking while maintaining sufficient reserves to stabilize annual awards in response to changes in income.

In the current high-rate environment, NC IOLTA has continued to see strong monthly income throughout 2024. Should income levels remain stable in the coming months, we anticipate that total funds available for distribution as 2025 grants will increase by 20-30% over the previous year's award totals.

However, as we prepare for a lowering of the federal funds target rate and the potential impact on NC IOLTA income, our projections indicate that significant, across-the-board increases to existing grants are unsustainable for the long term.

To provide additional clarity on NC IOLTA's grantmaking priorities for 2025, we are sharing the following information with all prospective applicants.

1. Regular Grantmaking

NC IOLTA will continue to value our support for existing grantees while also welcoming new requests. Current grantees may request increased grant amounts. There is no specific cap on possible increases; however, the NC IOLTA Board will be mindful of long-term grantmaking stability when considering requested grant increases.

2. System Support Grants

This grant category is offered as a one-year award to support projects that improve the system of the delivery of civil legal aid by increasing program efficiency, effectiveness, and collaboration. The Board welcomes System Support grant applications as a means for NC IOLTA to provide needed resources to strengthen organizational capacity via a short-term commitment.

3. Legal Needs Assessment: Identified Gaps in Legal Services

The [2021 Legal Needs Assessment](#) identified significant barriers, gaps, and needs in the availability of civil legal services. The subsequent working group process identified specific strategies to respond to identified needs in the areas of 1) family law; 2) legal services for immigrant populations; 3) outreach and communications; and 4) coordinated intake. The Board welcomes grant applications that support efforts to address identified barriers, gaps, and needs and/or implement [working group recommendations](#) and/or action items through programmatic or other organizational efforts.

4. Legal Services for Rural, Underserved Communities

It is a priority of the NC IOLTA Board to support increased access to justice in rural, underserved communities. The Board welcomes grant applications that extend or increase available services in these areas.

III. Grant Application Information

Timeline and Process

July 1, 2024

Grant information and application for 2024 grants is available to applicants.

July 15, 2024, 1:00pm – 2:00pm

Online grant information session. Register [here](#).

July 22 – August 23, 2024

Grant application consultations and technical support available by appointment. Please contact Mary Irvine (mirvine@ncbar.gov) or Dan Labarca (dlabarca@ncbar.gov).

August 30, 2024

Grant application and required attachments submitted by application deadline. *Note that late applications are generally not accepted.*

September – November 2024

NC IOLTA staff will review applications and follow up as needed to request any additional information or clarification.

December 2024

NC IOLTA Board meets to determine grant awards. Announcements will be made in early December.

January 2025

Funding begins after grant agreements are completed and signed.

III. Grant Application Information

Support for Grant Applicants

Please call or email us with any questions about NC IOLTA grants, the application process, and any technical questions related to WebGrants.

Staff Contact Information

- Mary Irvine, Executive Director
Email: mirvine@ncbar.gov
Telephone: 919.706.4435

Mary can provide more information about:

- NC IOLTA, who we are, and how we operate.
- NC IOLTA's strategic plan.
- Grant policies and eligibility.

- Dan Labarca, Program Manager
Email: dlabarca@ncbar.gov
Telephone: 919.706.4996

Dan can provide more information about:

- NC IOLTA's grant application process.
- Grants policies and eligibility.
- WebGrants navigation and troubleshooting.

IV. Attachments

The following attachments can be found below this page:

- a. **NC IOLTA Grant Policies.** Grant policies of the Board of Trustees of the North Carolina Interest on Lawyers' Trust Accounts program lay out application, financial, reporting, restrictions on the use of funds, and other policies approved by the Board. Grant policies were most recently updated on June 26, 2024.
- b. **WebGrants Instructions.** WebGrants is the portal maintained by NC IOLTA for grant applications and reporting. The attached instructions provide guidance on creating a new user account and navigating the application process.
- c. **2025 Grant Application Template.** Please note that is for informational purposes only. All applications must be submitted online via WebGrants.
- d. **2021 NC IOLTA Strategic Plan Summary.** The Board of Trustees of the North Carolina Interest on Lawyers' Trust Accounts (NC IOLTA) program approved a five-year strategic plan in June 2021. A summary of the strategic plan's primary objectives is included. The full plan can be found at www.nciolta.org.
- e. **List of 2024 NC IOLTA Grantees**



NORTH CAROLINA
IOLTA

**NC IOLTA
GRANT POLICIES**

- I. Background
- II. Grant Purposes
- III. Eligibility
- IV. Grantmaking Policies

I. Background

North Carolina Interest on Lawyers' Trust Accounts, NC IOLTA, was created in 1983 by the North Carolina State Bar and approved by the North Carolina Supreme Court to collect interest earned on lawyers' general pooled trust accounts to fund programs for the public's benefit.

Funding for the program comes primarily from funds remitted by financial institutions as interest earned on trust accounts established by lawyers pursuant to Rule 1.15 of the Rules of Professional Conduct and Rule .1316 of the Rules Governing the Administration of the Plan for Interest on Lawyers' Trust Accounts (IOLTA) and interest earned on accounts maintained by settlement agents pursuant to N.C.G.S. §45A-9.

NC IOLTA also utilizes funding received from cy pres awards (awards made pursuant to N.C.G.S. §1-267.10 with residual funds in class action cases after payment has been made to all individual claimants) and other court awards and interest earned on the Board's funds from investments. Funding may also come from any other sources directed to NC IOLTA for the provision of legal services to the indigent and improvement of the administration of justice.

II. Definitions

Board/ Grantor	Board of Trustees of NC IOLTA.
Grant Application	Materials submitted to NC IOLTA by applicants including information about the proposed grant activities, a proposed budget for the expenditure of IOLTA funds, and various required attachments.
Grant/ Grant Award	Funds awarded to a Grantee by NC IOLTA.
Indigent	Individuals with income at or below 200% of the federal poverty guidelines.
Recipient/ Grantee	Any grantee or sub-grantee receiving grant funds awarded by the Board of Trustees of NC IOLTA.
Rules	The rules governing NC IOLTA found at Section .1300 of the Governing Rules of the North Carolina State Bar codified in Chapter 1 of Title 27 of the North Carolina Administrative Code

III. Grant Purposes

The Rules governing NC IOLTA, Section .1300 of the Governing Rules of the North Carolina State Bar codified in Chapter 1 of Title 27 of the North Carolina Administrative Code, outline the purposes for which funds may be awarded.

- (1) Providing civil legal services for indigents;
- (2) Enhancement and improvement of grievance and disciplinary procedures to protect the public more fully from incompetent or unethical attorneys;
- (3) Development and maintenance of a fund for student loans to enable meritorious persons to obtain a legal education who would not otherwise have adequate funds for this purpose;
- (4) Such other programs designed to improve the administration of justice as may from time to time be proposed by the board and approved by the Supreme Court of North Carolina.

Further, the Rules note that private interests of the legal profession are not to be funded with IOLTA funds.

NC IOLTA currently awards Grants under purpose (1) and purpose (4) laid out in the Rules.

IV. Eligibility

In order to be eligible for an IOLTA grant, an organization:

- (1) must be exempt from taxation under Section 501(c)(3) of the United States Internal Revenue Code, as amended; or
- (2) must agree to use the IOLTA grant only for purposes that are charitable or educational within the meaning of Section 501(c)(3) of the United States Internal Revenue Code, as amended.

North Carolina IOLTA grants, awarded under any grant category, must be used to provide services and/or support efforts that benefit North Carolina residents.

Additional eligibility information for particular Grant Programs can be found in the program description for that program.

V. Grantmaking Policies

Grant policies apply to all Recipients of North Carolina Interest on Lawyers' Trust Accounts program (NC IOLTA) grants and any sub-recipients.

Grant policies are incorporated in the grant agreements which must be signed prior to disbursement of any funds. Any special conditions or provisions that apply uniquely to a grant program, individual grant, or Grantee will be included in the grant agreement.

Sections

1. General Provisions
2. Application
3. Restrictions on Use of Funds
4. Reporting
5. Financial
6. Miscellaneous
7. Specific Grant Program Provisions

1. General Provisions

- a. All Grants made by the NC IOLTA program are discretionary (within the four categories established in the Rules) and determined by the Board on an annual basis. No mandatory limits or allocations are established for any category or program, though the Board reserves the right to provide guidance in a given year about particular funding availability.
- b. The typical grant cycle is annual and is based on the calendar year. As noted in the grant agreements, the Board awards Grants for the current annual grant cycle only and makes no representation regarding continued funding for any program or project.
- c. NC IOLTA reserves the right to rescind the Grant Award and demand the return of any and all portions thereof if Grantee fails to comply with any of the provisions.
- d. The Board reserves the right to make Grant Awards on an emergency basis or to request out-of-cycle Grant Applications.
- e. Grantee will utilize the Grant Award only for the public charitable purposes specified in the Grant Application and in accordance with the amounts set forth in the final budget submitted in the Grant Application and as approved by the Board.

Grant activities and spending shall not materially deviate from the approved Grant Application and budget.

- f. For the Civil Legal Aid Grant Program, a majority of Grantee's clients must be Indigent or low-income individuals or, alternatively, if Grantee uses an alternate definition of eligibility, Grantee agrees that they can show that a majority of clients are Indigent.
- g. For the Administration of Justice Grant Program, as noted in the Rules, Grants made under category four, "programs designed to improve the administration of justice," must initially be approved by the North Carolina Supreme Court. Additional approval is not required for continuing Grants in that category.
- h. Legal services provided by Grantee generally must be provided free of charge. An organization will not be disqualified from receiving funds from NC IOLTA for charging nominal fees as long as the organization allows for the complete waiver of fees in cases where clients cannot pay the fee. The Board reserves the right to approve grants to an organization charging significantly reduced fees in areas of law where services are otherwise unavailable to low-income clients.

Grantees that charge fees, whether nominal or reduced, are required to provide a copy of their client fee policy and schedule to NC IOLTA and include information on fees received in their regular financial reports to NC IOLTA, including information about the number of fee waivers provided to clients. Grantee is required to notify NC IOLTA of any changes in their client fee policy and/or schedule within thirty days of approved changes.

2. Application

- a. The Board will typically not accept Grant Applications received after the announced deadline. The Board reserves the right to accept late Grant Applications of continuing Grantees based upon consideration of a written explanation and request.
- b. Because the Board does not want its decision-making process influenced by Applicants or Grantees, the Board does not allow applicants to make presentations at the grantmaking Board meeting. The Board reserves the right to invite Grantees to other meetings to educate the Board regarding a particular program or to provide post-grant progress reports.
- c. Grant Applications must be accompanied by a Grant Application certification signed by a staff member who has the authority to sign contracts on behalf of the applicant organization and the applicant organization's board chair (or designated member of the board). The certification indicates that the information provided within the Application is accurate, the funds will be used for the purposes described

in the Grant Application, and that the organization will adhere to the terms and conditions set forth in the grant agreement.

3. Restrictions on Use of Funds

- a. Grant Awards may not be used for any political campaign or to support attempts to influence legislation or any governmental body.
- b. The North Carolina State Bar shall not be an applicant for or receive a Grant Award from NC IOLTA funds.
- c. The Board has determined that IOLTA grant funds should generally not be used to pay the salaries of government employees. The Board may determine to use IOLTA grant funds to pay the salaries of government employees under certain circumstances as outlined below:
 - (1) The Board may determine to use IOLTA grant funds to pay the salaries of government employees that support efforts as outlined in the grant purposes, including providing civil legal services to Indigents and staffing efforts to improve the administration of justice; however grant funds should not support the provision of constitutionally mandated legal or court services, for example, the salaries of public defenders, district attorneys, clerks, or judges or to support the salaries of employees serving in a core government function required by law.
 - (2) The Board may determine to use IOLTA grant funds to pay the salaries of government employees for a temporary position necessitated by disaster or other special circumstances.
- d. The Board has determined that IOLTA Grant Awards should not be used to pay for private attorneys who contract with Grantees to provide legal services to the poor (even on a reduced fee basis) because the Board prefers to foster volunteer lawyer efforts. Grant Awards to support volunteer lawyer programs, however, may support the salaries of coordinators and other program costs for programs that recruit contract lawyers as well as volunteer lawyers.
- e. The Board may place other restrictions on the use of grant funds on a case-by-case basis.

4. Reporting

- a. Grantee will be required to submit to NC IOLTA written interim reports and a final report specifically stating the progress made in accomplishing the grant's purpose. NC IOLTA retains discretion to require more frequent reports from Grantees.

- b. Grantee will immediately notify NC IOLTA of any material changes in the Grantee's organizational status, management, tax status, charitable purpose, utilization of the Grant Award, or of any other material change. In addition, Grantee will immediately notify NC IOLTA of any material financial questions raised by any internal or external financial audit conducted by any entity or by any financial institution.

5. Financial

- a. Payments will be disbursed only after Grantee has completed and signed a grant agreement. Grants are typically paid in four equal installments, sent on a quarterly basis. The Board retains the discretion to approve an alternate payment schedule if necessary.
- b. Grantee will be required to submit to NC IOLTA written interim reports and a final report including a detailed financial report on how the Grant Award was spent.
- c. All financial information submitted to NC IOLTA must conform to generally accepted accounting principles and be submitted in the format requested.
- d. Grantees are required to send to NC IOLTA a copy of the organization's most current audit or financial review and any management letter associated with the audit upon completion if they have one performed. If Grantee has annual revenue more than \$500,000 and has received more than \$100,000 in IOLTA funds on an annual basis, an audit conducted by an external auditor and any management letter associated with the audit prepared by a Certified Public Accountant must be conducted and submitted. All other Grantees will annually submit a copy of their annual 990 document. NC IOLTA may audit or cause an audit to be conducted of the Grant Award at the Grantee's expense.
- e. If Grantee seeks to modify use of a Grant Award, Grantee must notify NC IOLTA and obtain approval from NC IOLTA prior to any change taking place. After notification, NC IOLTA will either direct Grantee to report use of funds on regular financial reports submitted if the change is deemed to be minimal or request Grantee submit a modification request if the proposed change is deemed to be significant. The request should detail the approximate amount of funds and description of the need to modify the use of funds. The Board will be informed of requests through regular grant updates from the executive director.

The executive director has discretion to approve changes in the use of grant funds during the annual grant cycle and to decide when changes are so significant that they should be approved by the Board or its executive committee. Factors that may singly or in combination cause the executive director to find the changes to be so

significant that they should be brought to the Board for approval include but are not limited to:

- i. A use that involves budget line items not included in the Grant Application budget;
 - ii. A change in allocation of funds to or from personnel vs. non personnel;
 - iii. A change involving over 10% of the grant amount.
- f. Grantees that do not spend the grant funds by the end of the grant term must return unspent funds within two months of the end of the grant term or submit a written request to NC IOLTA two months prior to the end of the grant term and receive approval from the Board to hold the funds past the grant term.
- g. Grantee will maintain financial records of all receipts and expenditures relating to the Grant Award. All such financial records, as well as all reports submitted to NC IOLTA, must be kept for five (5) years and be made available for inspection by NC IOLTA representatives during reasonable business hours.

6. Miscellaneous

- a. At their discretion, the trustees may offer a matching grant to an applicant and may fashion the grant to meet specific circumstances. In general, however, if a matching grant is offered for a specific purpose (e.g. equipment or a defined project), the entire amount of the match must be raised by the Grantee to receive the match indicated in the Grant Award. If the grant is for a general purpose (e.g. operating support or an incentive for fundraising), matching funds in the Grant Award may be paid on a 1:1 basis up to the match amount offered. Before receiving matching funds, the Grantee will provide to NC IOLTA a statement of certification and supporting documentation as to the source and amount of matching funds.
- b. In any Grantee publication, including but not limited to annual reports and websites, which lists or makes reference to sources of Grantee funding, Grantees of NC IOLTA should list NC IOLTA as a funder.
- c. Consistent with stated organizational values, NC IOLTA seeks to promote the effective and efficient delivery of assistance to all eligible clients across the state through a coordinated system. NC IOLTA expects the Grantee to participate in a meaningful way during the grant year with other NC IOLTA Grantees and stakeholders in the legal community in efforts to coordinate the statewide delivery of legal aid. If requested by NC IOLTA, Grantee shall meet with other Grantees to identify, propose, and implement opportunities for Grantee cooperation and coordination to this end. Such efforts may also include participation in geographic or practice area collaboratives, participation in the work of the Equal Justice Alliance and the NC Equal Access to Justice Commission, and other collaborative partnerships.

7. Specific Grant Provisions

NC IOLTA has from time to time created specific policies for the purposes of awarding grants in a particular area. The below policies appear in the Grantee's grant agreement on an as needed basis. The Board retains the discretion to require additional special grant provisions for individual Grantees or Grant Awards as necessary.

a. Funding for Fellowship Programs:

The IOLTA Trustees established the Clifton Everett Fellowship program in 1992 to honor the memory of Clifton W. Everett, Sr., a resident of Eastern North Carolina who played a principal role in the creation of the NC IOLTA Program when serving as President of the NC State Bar and who served as a trustee (from 1983 through 1990) and Vice-Chair of the NC IOLTA program.

The Fellowship Program is designed to:

- support entry-level staff attorney position(s) at LANC so that they can recruit interested recent law school graduates and give them an opportunity to learn about the legal services practice and develop their practical lawyering skills under experienced mentors;
- provide staff assistance to rural programs that have more difficulty recruiting and retaining attorneys;
- allow the field programs where the fellows are placed to evaluate the fellows as candidates for permanent staff attorney positions.

Preference will be given to former Martin Luther King Jr. and IOLTA summer interns with successful performance evaluations.

The LANC Executive Director makes the placement decision regarding the field programs to which the fellow(s) will be assigned but the program assignments will be reported to IOLTA prior to the beginning of the placement(s). The placement decision is based on programming needs, the preferences of the fellows and prior participation by the field programs.

b. Funding for Public Interest Internships for Law Students:

In cooperation with North Carolina's accredited law schools, the North Carolina IOLTA Program supports a public service internship program which provides stipends for summer employment of law students at public interest organizations in North Carolina. Grant funds are designated exclusively for law students who are serving people in counties designated as a "legal desert" which is defined as a county with less than one lawyer per 1,000 residents. The IOLTA Public Service Internship Program is designed to:

- expose law students of all backgrounds to the practice of law in the public interest, particularly in meeting the legal needs of the poor and the underrepresented and promoting the effective administration of justice through the court system; and
- promote a commitment to the practice of law in the public interest either as a career or as pro bono work once the law students enter practice; and
- provide an opportunity for law students to have an in-depth educational experience in legal work in the public interest; and
- support law students to secure summer employment in areas of the state with limited access to legal professionals; and
- provide a resource in the form of student legal work to public service organizations; and
- provide some compensation to students who work for public interest organizations that otherwise cannot pay for their assistance or provide pay that is insufficient to cover student living expenses during the summer.

Summer internships funded by IOLTA grants to North Carolina law schools may only be undertaken at North Carolina-based nonprofit organizations that provide free civil legal services to low-income individuals, at public defender and district attorney offices in North Carolina, and at courts across the state working under the supervision of judges who will serve people in counties designated as a legal desert as outlined above. All organizations must be located in the state of North Carolina and the student's work must be carried out in the state of North Carolina. Though the student's work must be focused on serving people in counties designated as a legal desert, the office may or may not be physically located in the county designated as a legal desert.

The organization must provide an opportunity for the student to do legal work with appropriate supervision. Summer internship stipends are not intended to support internship programs that are operated by the law schools that are making the internship placement decisions.

IOLTA funds may not be used for lobbying. Therefore, though IOLTA-funded interns may work for organizations that do lobbying work, the students may not participate in lobbying work while paid by IOLTA funds.

The student interns will be chosen by the Law Schools according to a procedure described in their application. After the school determines the proposed award of IOLTA-funded stipends for the year, each school will send to NC IOLTA a list of the students, the organization where they will work, and the counties they will serve. The proposed placements and stipends submitted by the law schools must be approved by NC IOLTA before grant funds will be paid. The grant funds for the stipends will be paid to the law schools for distribution to the students. At the end of each summer the law schools will submit a final report that evaluates the student experience and placements. The report will include the number of students and amount of funding each received. The report will detail the procedures for selection of students as well as information about any students they were unable to offer stipends to that were otherwise eligible.

The Internship Program was established to create additional opportunities for paid employment in public service organizations and allow students of all backgrounds to pursue summer public interest employment when such opportunities offer insufficient compensation to cover student living expenses and may result in additional expenses, for example to secure temporary housing in a rural community. As such, recipients of IOLTA public service internship stipends through the North Carolina law schools may receive additional wages or stipends beyond IOLTA funding but the total compensation, including wages and stipends, may not exceed \$10,000 for a full summer (at least eight-week) internship. IOLTA does not pay FICA costs.



NORTH CAROLINA
IOLTA

**NORTH CAROLINA
INTEREST ON LAWYERS' TRUST ACCOUNTS**
A program of the North Carolina State Bar

P.O. Box 25996, Raleigh, N.C. 27611-5996
Phone: 919-828-0477 Fax: 919-821-9168
www.nciolta.org IOLTA@ncbar.gov

NC IOLTA Online WebGrants Instructions

Accessing WebGrants (the online portal for NC IOLTA grant applications and reporting):

- Go to <http://nciolta.dullestech.net> to log in or create an account.
- If already registered, use your User ID and Password to log in.

- New users can create an account using the [Click here to Register](#) button.
 - Complete all requested information.
 - When complete, click [Save Registration Information](#) at the top or bottom of the page.
 - Once your registration is approved, you will receive two separate emails providing:
 1. your assigned User ID
 2. a temporary password.
 - The first time you log in, please update your password.

If the individual who submits your organization's application and reports has changed, please create a new user account for the current staff member. Do not change the user name in an existing profile.

Apply for a Grant:

- From the Menu, click on [Funding Opportunities](#).
- Select the appropriate funding opportunity. In 2025, three opportunities are available through general IOLTA funding:
 1. [2025 IOLTA Grant Cycle](#) – this opportunity is for those applying for 1) Civil Legal Aid Grants (excluding Pro Bono Support Grants and System Support Grants), and 2) Administration of Justice Grants.
 2. [2025 IOLTA Grant Cycle – Pro Bono Support](#) – this opportunity is for those applying for a Pro Bono Support Grant.
 3. [2025 IOLTA Grant Cycle – System Support](#) – this opportunity is for those applying for a System Support Grant. Please note that this is a streamlined application available only for applicants who are also applying for a Civil Legal Aid or Pro Bono Support Grant. Please contact NC IOLTA if you are not applying for other grants and intend to apply for a System Support Grant only.

Note that organizations that have received both general support AND funding specifically for a pro bono support program will continue to complete two separate applications.

- In the upper right-hand corner, select [Start New Application](#) to begin filling out your application.

General Information:

- There are two steps to complete the General Information section:
 1. Create a title for your application and select your primary contact.
 2. Confirm that basic information is correct, select any additional contacts within your organization that will also manage the grant, and click [Save Form Information](#).
- You will be taken to the Application Preview tab that lists the separate application components. The system recognizes that additional components have not yet been completed and posts a notice that the application is not ready to be submitted.

Application Preview Alert History Map

Application Details [Preview Application](#) [Ask a Question](#) [Withdraw](#)

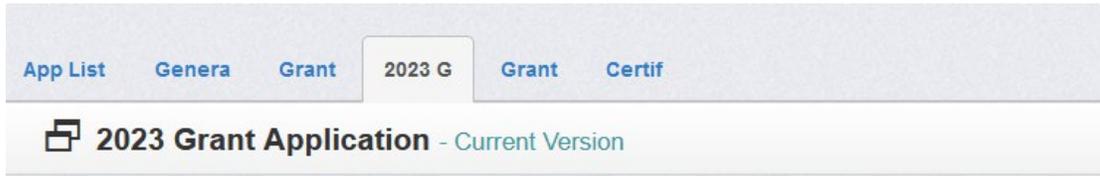
Application cannot be Submitted Currently

- Application components are not complete

Component	Complete?	Last Edited
General Information	✓	Jul 28, 2022 9:59 AM - Test Grantee
Grant Category	-	-
2023 Grant Application	-	-
Grant Application Budget	-	-
Certification Attachment Upload	-	-

Application Components:

- You will need to complete each component under **Application Details** before submitting:
 - General Information
 - Grant Category
 - Grant Application
 - Grant Application Budget
 - Certification Attachment Upload
- Complete all questions in each component by clicking on the form name (i.e., **2025 Grant Application** or **Grant Application Budget**).
- Please be sure to click **Save Form** prior to navigating to a new page.
- Helpful tip: you can navigate between grant components using the tabs. Each tab has a 6-character text limit, but if you hover over the tab – e.g., 2023 G, Grant, Certif – the full component name will become visible.



- When you have completed all questions in a component, click **Mark as Complete**. You must mark each component as complete before you will be able to submit the application.

Grant Budget:

The Grant Budget is divided into three sections:

1. Income
2. Personnel Expenditures
3. Non-Personnel Expenditures.

- To begin entering your budget details, click on the [Add Row](#) button for the desired section.
- Select the [Source](#) from the drop-down list and provide a description if applicable. Provide the IOLTA Budget amount and the Program Budget amount for each line item. An explanation of the Sources can be found at the end of these instructions. **Please review the list fully and avoid choosing ‘Other’ if another category fits.**
- Repeat this process for each line item to be entered.
- As a reminder, budget line items will only appear in future status reports if included in this stage of the budget creation.
- When you have completed the Application Budget, click [Mark as Complete](#).

Grant Application – Providing Additional Documentation:

- The last question on the Grant Application form requests your officer and board member list as well as board meeting dates. The following documents are optional unless you are a first-time applicant or your information has changed since your last application:
 - current copies of your organization’s by laws
 - IRS determination letter
 - intake forms/eligibility requirements/sliding fee schedule (if applicable)
- These documents can be uploaded directly in the application.

Submitting Application:

- Before submitting your application, confirm that all relevant Application Forms are marked as complete: Grant Category, Grant Application, Grant Application Budget, Pro Bono Support Addendum (if applicable), and Certification Attachment Upload.
- Click [Application Details](#) to preview a copy of the full final application before submitting.
- Click [Submit](#) to submit your final application to NC IOLTA.
- You will receive an e-mail confirmation when your application has been successfully submitted.

Helpful Tips:

- You can print a copy of the full application by clicking [Print](#) at the top of the Application Preview page.
- You can copy text into the application from an existing word document. However, please note that the character count of text copied into WebGrants frequently exceeds the character count of the source document (because the system converts text to HTML code). Prior to submission, please double-check that your responses are complete and have not been cut off due to excessive characters.
- To change your password, log in, go to [My Profile](#) in the main menu, and click on the [Reset Password](#) link.
- If you have questions, you can use the [Ask a Question](#) feature. Using this feature will ensure a quicker response from a member of the NC IOLTA staff. To ask a question, click on [Funding Opportunities](#) from the Main Menu, click on the relevant Opportunity Title, and click [Ask a Question](#).

BUDGET APPLICATION SOURCES

Please avoid using 'Other' if another category fits.

INCOME	
IOLTA Grant	IOLTA grant request (minus matching funds requested)
IOLTA Pro Bono Support	IOLTA Pro Bono Support grant request
IOLTA Home Defense Project	IOLTA Home Defense Project grant request
IOLTA Match	IOLTA match request
IOLTA Carryover	IOLTA carry over
Federal Funds - Awarded	Federal funds confirmed, including LSC, DOJ, HUD, US DHHS
Federal Funds - Pending	Federal funds not yet confirmed, including LSC, DOJ, HUD, US DHHS
State Funds - Awarded	State funds confirmed, including filing fees, VOWA, VOCA, NC DHHS
State Funds - Pending	State funds not yet confirmed, including filing fees, VOWA, VOCA, NC DHHS
Local Government	County and city government awards
United Way	
Private Foundations - Awarded	Awards confirmed from funders such as Z. Smith Reynolds
Private Foundations - Pending	Awards not yet confirmed from funders such as Z. Smith Reynolds
Public Donations	Individual donations
Special Events	
Client Fees/ Services Provided	
Attorney Fee Awards	Court awarded attorney fees
Court Fees	Court fees (other than attorney fees)
Rental Income	
Investments / Interest	
Other	Please provide a description. Avoid using 'Other' if another category will fit.
PERSONNEL	
All Personnel – Combined	Aggregate Expenses of all staff
Attorney Staff - Combined	Aggregate Expense of all attorneys
Paralegal Staff - Combined	Aggregate Expense of all paralegals
Administrative Staff - Combined	Aggregate Expense of all administrative staff
Interns - Combined	Aggregate Expense of all Interns
Management	
Fringe Benefits	
Payroll Taxes	
Attorney	For purposes of listing attorney expenses individually
Paralegal	For purposes of listing paralegal expenses individually
Administrative Staff	For purposes of listing admin staff expenses individually
Interns	For purposes of listing intern expenses individually
Other	Please provide a description. Avoid using 'Other' if another category will fit.

NON-PERSONNEL	
Audit/Accounting Services	
Board/Staff Development	
Maintenance	
Business Taxes	
Capital Expenses	
Consultant	
Contract Services	
Courier Service	
Depreciation	
Dues	Voluntary individual and organizational membership dues
Equipment	
Indirect Costs	
Insurance	
Library/Law Subscriptions	
Licenses & Professional Fees	Mandatory license and professional fees
Litigation	
Loan Expense/Interest	
Lobbying	
Meetings	
Parking	
Postage	
Printing	
Publication	
Rent/Mortgage	Rent, mortgage, overhead
Bank Fees	Service charges, wire fees, maintenance fees
Storage	
Subscriptions	
Supplies	
Technology	
Telephone & Internet	
Training	
Travel	
Utilities	
Other	Please provide a description. Avoid using 'Other' if another category will fit.

2025 Grant Application Template

Application Details

Funding Opportunity: 25410-2025 IOLTA Grant Cycle
Funding Opportunity Due Date: Aug 30, 2024 11:59 PM IOLTA
Program Area: Editing
Status: Final Application
Stage:

Initial Submit Date:
Initially Submitted By:
Last Submit Date:
Last Submitted By:

Grant Category

Current Funds

Select date last applied for this project:

Do you currently receive IOLTA funds?*

Grant Category

Grant Category*:

Select One

Does the program provide civil legal services to indigent or low income individuals or groups (where indigent clients are those at or below 200% of the federal poverty guideline or eligible to receive public assistance through a government program for the indigent)?

Are clients at or below 200% of poverty level?:

If the program's definition of indigent or low income differs from the above, can the program show that a majority of clients fall within the stated definition? _____

Are a majority of clients indigent?:

Does the program directly represent clients or client groups?

Does program directly represent clients?:

Are legal services provided to clients free of charge?

Are services free of charge?:

If clients are charged a fee, does the program allow for complete waiver of fees in cases where clients cannot pay the fee?

Are waivers available?:

2025 Grant Application

Amount Requested

Amount Requested*:

Financial Information

Current fund balance*:

Prior year's fund balance*:

Value of your endowment (if any) *:

Total expenditures for the last three completed fiscal years; Year 1 being the most recent:

Expenditures should be for your full organization if applying for general operating support, or for the discrete project if applying for project support.

Year 1.)*:

Year 2.)*:

Year 3.)*:

Date of last outside audit*:

Please upload a copy of your most recent audit.*:

General Information

1) Description

Character Limit = 5,000 (about 750 words)

State your mission and describe the community you serve. Include demographic data to describe the geographic area and your primary constituency.*:

Character Limit = 3,500 (about 500 words)

Describe your primary activities and explain how they contribute to fulfilling your mission.*:

2) Activities and Achievements

Please answer questions below for the current year.

Character Limit = 10,000 (about 1,500 words)

Describe your program's most significant accomplishments this year. If you are a current IOLTA grantee, specify how any IOLTA funds received were used to support your program's work. *:

For the following questions, use caseload data for the most recent year in which complete statistics are available.

If your organization does not represent clients, please list the number of participants that benefited from services.

Grantees that do not use volunteer attorneys to provide direct legal services and grantees that are applying for a separate grant for their Pro Bono Support Program do not need to answer the pro bono questions below.

List the number of eligible clients or participants in your service area*:

Source of information about eligible clients (ie. Census, AOC data, etc.)*:

How many clients or participants did you serve last year?*

If known, how many total people were in

all households that you served last year?:

How many pro bono volunteer attorneys provided assistance on a case, clinic, or other pro bono project last year?:

How many pro bono hours were recorded by attorney volunteers in your program last year?:

What is the value of donated pro bono attorney volunteer services last year? Please indicate the hourly rate used or other method of calculating the value.:

3) Goals and Objectives

Please answer questions below for the grant year for which you are applying.

Character Limit = 10,000 (about 1,500 words)

Describe your program's specific goals or priorities to be pursued to advance your mission and specify how you propose to use IOLTA funds to accomplish those goals. *:

How many clients or participants do you intend to serve? *:

How many total people are in all households you intend to serve?:

4) Staff Information

Provide staffing details based on full-time equivalents (FTE) for your organization if applying for general operating support, or for the discrete project if applying for project support.

Total staff FTE *:

Attorney staff FTE (of total above)*:

Paralegal staff FTE (of total above)*:

Total FTE funded by IOLTA grant if awarded as requested*:

5) Equity

As part of NC IOLTA's strategic plan, we are committed to pursuing equity in our work. To us, equity means we pursue our work through an inclusive process with diverse voices and we ensure that investments support access to legal services for all persons and communities regardless of race, color, ethnic identity, national origin, sexual orientation, geography, age, gender identity, gender, disability, immigration status, lack of income or wealth, or religious beliefs. In order to establish an understanding of how applicant organizations pursue equity in their work, we are asking all applicants to share with us information about how your organization works to advance equity. Character Limit = 5,000 (about 750 words)

Briefly describe your organization's efforts, if any, to advance equity. This may include internal efforts (e.g. staff training, recruitment, etc.) or external efforts (e.g. client outreach, language accessibility, etc.). If known, please share demographics of the organization's clients or beneficiaries, staff, and board.*:

6) Project Impact Narrative

This should be an actual impact story from the past year. Character Limit = 2,500 (about 375 words)

Please provide a narrative that best describes your program's impact. For programs that provide direct client services, this should be a client story from the past year. For programs that do not provide direct client services, please provide a narrative or other information regarding the broader impact of your efforts on your participants and service area over the past year. *:

Additional Information

NC IOLTA requires applicants, including current grantees, to provide current copies of the following documents upon application. Please attach the most current documents here where applicable.

Current officer and board member list*:

Board meeting dates*:

By-laws (if updated since last application or first-time applicant):

IRS determination letter of charitable organization status (if updated since last application or first-time applicant):

Intake forms, client eligibility requirements and sliding fee schedule (if updated since last application or first-time applicant):

Additional Attachment:

If you need to provide additional information by attachment, for example an addendum to information submitted in the budget or other requested documentation, please attach here.

25417 - System Support Application Template

Application Details

Funding Opportunity: 25416-2025 IOLTA Grant Cycle - System Support
Funding Opportunity Due Date: Aug 30, 2024 11:59 PM
Program Area: IOLTA
Status: Editing
Stage: Final Application

Initial Submit Date:
Initially Submitted By:
Last Submit Date:
Last Submitted By:

System Support Grant Application

Amount Requested

Amount Requested*:

Policy Confirmation

Please check the box to confirm that applicant has reviewed and agrees to abide by NC IOLTA's policies. (Policies can be found in the Grant Information Packet available on NC IOLTA's website.)

Check here to confirm*:

General Information

CharacterLimit=10,000(about1,500words)

Describe the proposed project and how IOLTA funds will be used to support the project.*:

CharacterLimit=5,000(about750words)

System Support Grants are offered to support efforts to improve the system of the delivery of civil legal aid by increasing program efficiency, effectiveness, and collaboration. How does the proposed project support increased program efficiency, effectiveness, and collaboration?*

CharacterLimit=5,000(about750words)

How will building the organization's capacity as described above through this project help the organization to fulfill its mission?*

CharacterLimit=5,000(about750words)

If applicable, list other funding that will support this project. In the event that this project is one that will have ongoing costs beyond the System Support Grant term of one year (for example, salary for staff hired or ongoing software costs), please also describe how these costs will be sustained in the future.*:

CharacterLimit=5,000(about750words)



NORTH CAROLINA
IOLTA

NCIOLTA.ORG

OVERVIEW of NC IOLTA STRATEGIC PLAN 2021-2025

Summary of the process

The Preamble of the North Carolina Rules of Professional Conduct calls on all lawyers to devote professional time and resources to the improvement of the law, access to the legal system, and the administration of justice.

It is this professional obligation of all lawyers which was central to the creation of the North Carolina Interest on Lawyers' Trust Accounts (NC IOLTA) program in 1983 by the North Carolina State Bar, with the approval of the North Carolina Supreme Court. This principle remains central today.

In January 2021, NC IOLTA initiated a strategic planning process to create a clear road map to guide IOLTA's work in the coming years, consistent with the program's founding principles and building upon achievements made since inception. The Executive Committee of the board led the process, with the participation of the full board and staff and the support of consultants Stephanie Choy and Lonnie Powers. The process also included 19 stakeholder interviews and a community forum for feedback on the draft plan. The board approved the strategic plan on June 23, 2021. NC IOLTA looks forward to working with you and other stakeholders to pursue our shared goals in the coming years.

VISION

A North Carolina where all people can effectively meet their legal needs.

MISSION STATEMENT

To improve the lives of North Carolinians by strengthening the justice system as a leader, partner, and funder.

VALUES

INTEGRITY Our organizational policies and practices engender trust from stakeholders.

STEWARDSHIP We ensure funds received from any and all sources are used effectively and efficiently to make improvements in the quality of justice, with a focus on civil justice.

EQUITY We pursue equity through an inclusive process with diverse voices with a view to ensuring that investments support access to legal services for all persons and communities regardless of race, color, ethnic identity, national origin, sexual orientation, geography, age, gender identity, gender, disability, immigration status, lack of income or wealth, or religious beliefs.

LEADERSHIP As a funder, we have a unique role within the civil justice community and the bar to work towards improvement of the justice system. We lead by example, using our voice and knowledge to educate and add value to the justice community.

PARTNERSHIP We recognize that the whole is greater than the sum of its parts, and the community is stronger working collaboratively. We seek to deepen our partnerships not only with legal aid organizations and statewide justice partners, but also financial institutions, foundation funders, law schools, the private bar, and corporations.

For more information about NC IOLTA, visit WWW.NCIOLTA.ORG.

GOAL 1: Be a responsive and responsible grantmaker that engages in effective stewardship of funds to advance its mission.

GOAL 2: Solidify, increase, and diversify NC IOLTA funding.

GOAL 3: Heighten communications about the benefits produced by IOLTA and the need for increased civil legal aid.

GOAL 4: Embrace IOLTA's leadership role in the justice community.

GOAL 5: Build organizational capacity to pursue identified priorities, support sustainability, and address new issues as they arise.



NORTH CAROLINA IOLTA



| 2024 Grantees - Civil Legal Aid |

NC IOLTA awards grants to provide civil legal aid for low-income individuals and other programs designed to improve the administration of justice. In 2024, NC IOLTA will distribute over \$9.4 million in grants through the regular IOLTA grant cycle. 92% of grant funds support Civil Legal Aid Grants, which provide basic access to the justice system for individuals, families and children residing in every NC county.

Organization	Grant Amount	Organization Website
Capital Area Immigrants' Rights Coalition IOLTA grant supports the Immigration Impact Lab.	\$ 50,000	https://www.caircoalition.org/
Carolina Migrant Network IOLTA grant supports immigration legal representation.	\$ 50,000	http://www.carolinamigrantnetwork.org/
Charlotte Center for Legal Advocacy IOLTA grants support general operating expenses for programs including, healthcare, housing, immigrant justice, low-income taxpayers, and veterans.	\$ 555,200	https://charlottelegaladvocacy.org/
Children's Law Center of Central NC IOLTA grant supports legal services for children in high-conflict custody cases. CLC also received a system support grant for strategic planning.	\$ 114,000	https://www.childrenslawcenternc.org/
Council for Children's Rights IOLTA grant supports the Custody Advocacy Program and Education Law Program.	\$ 120,000	https://www.cfcrights.org/
Disability Rights North Carolina IOLTA grants support the Special Education Juvenile Justice Project and the Homelessness Prevention Project.	\$ 355,000	https://disabilityrightsncc.org/
Financial Protection Law Center IOLTA grant supports general operating expenses for programs to preserve homeownership and property and to protect families from predatory financial practices.	\$ 65,000	https://financialprotectionlawcenter.org/
Inner Banks Legal Services IOLTA grant supports legal services for immigrant populations.	\$ 100,000	https://ibxlegal.org/
International House of Metrolina IOLTA grant supports the Immigration Law Clinic.	\$ 50,000	https://www.ihclt.org/
JusticeMatters IOLTA grant supports general operating expenses for programs that support survivors of human trafficking.	\$ 150,000	https://justicemattersnc.org/
Land Loss Prevention Project IOLTA grant supports general operating expenses for programs that support family farmers and landowners.	\$ 90,000	https://www.landloss.org/
Legal Aid of North Carolina IOLTA grants support general operating expenses for programs including disaster relief, education, employment, healthcare, housing, public benefits, and seniors. Legal Aid also received a system support grant for organizational capacity building.	\$ 4,490,000	https://www.legalaidnc.org/
NC Equal Access to Justice Commission IOLTA grant supports the Pro Bono Resource Center.	\$ 140,000	https://www.nccourts.gov/commissions
NC Equal Justice Alliance IOLTA grant supports general operating expenses and the Legal Resource Finder.	\$ 76,700	https://ncequaljusticealliance.org/
North Carolina Justice Center IOLTA grants support the litigation team. The Justice Center also received a system support grant for strategic planning.	\$ 1,010,000	https://www.ncjustice.org/
North Carolina Prisoner Legal Services IOLTA grant supports the Safe and Humane Jails Project. NCPLS also received a system support grant for technology upgrades.	\$ 74,900	https://www.ncpls.org/
Pisgah Legal Services IOLTA grants support general operating expenses for programs including children's law, domestic violence prevention, expunctions, healthcare, housing, and more.	\$ 1,050,000	https://www.pisgahlegal.org/
Safe Alliance IOLTA grant supports legal services for individuals impacted by domestic violence and sexual assault.	\$ 80,000	https://www.safealliance.org
World Relief Durham IOLTA grant supports the Immigration Legal Services program.	\$ 50,000	https://worldrelief.org/durham/
TOTAL		\$ 8,670,800



NORTH CAROLINA IOLTA



| 2024 Grantees - Administration of Justice |

NC IOLTA awards grants to provide civil legal aid for low-income individuals and other programs designed to improve the administration of justice. In 2024, NC IOLTA will distribute over \$9.4 million in grants through the regular IOLTA grant cycle. 8% of grant funds are directed to Administration of Justice Grants, which seek to improve the administration of justice in North Carolina through a variety of programs that typically have a statewide impact.

Organization	Grant Amount	Organization Website
Bolch Judicial Institute at Duke University School of Law IOLTA grant continues support for the Trauma-Informed Courts project to finalize research on trauma-informed practices in courts.	\$ 120,000	https://judicialstudies.duke.edu/
Court Support for Families IOLTA grant supports general operating expenses for a program to support pro se litigants in family law cases.	\$ 25,000	https://courtsupportnc.com/
Incubator for Legal Practice and Innovation IOLTA grant supports general operating expenses for an incubator for entrepreneurial attorneys to build practices that serve underserved communities.	\$ 15,000	https://www.innovationlegal.org/
Mediation Network of NC IOLTA grant supports general operating expenses for a network of mediation centers across the state and their Criminal District Court mediation services.	\$ 55,000	https://mnnc.org/
NC Center on Actual Innocence IOLTA grant supports general operating expenses for identifying, investigating, and litigating credible claims of innocence.	\$ 50,000	https://www.nccai.org/
NC Dispute Resolution Commission IOLTA grant supports a pilot program to provide district criminal court mediation at no cost to participants.	\$ 100,000	https://www.nccourts.gov/commissions/dispute-resolution-commission
NC Equal Access to Justice Commission IOLTA grant supports the Wake County Legal Support Center, a resource hub in the courthouse for self-represented litigants.	\$ 100,000	https://www.nccourts.gov/commissions
NC Legal Education Assistance Fund IOLTA grant supports general operating expenses for the loan repayment assistance program. NC LEAF also received a system support grant for technology.	\$ 121,800	https://ncleaf.org/
NC Office of Indigent Defense Services IOLTA grant supports a Recruitment and Training Coordinator position aimed at improving retention and effectiveness.	\$ 160,000	https://www.ncids.org/
Religious Coalition for a Nonviolent Durham IOLTA grant supports the Restorative Justice Durham project, an alternative process in Durham's criminal justice system to repair harms.	\$ 50,000	https://www.nonviolentdurham.org/
TOTAL	\$ 796,800	