



## INTEREST ON LAWYERS' TRUST ACCOUNTS (IOLTA) FY 2026 GRANT APPLICATION INFORMATION & GUIDELINES

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### Grant Announcement

The Boston Bar Foundation (BBF) has announced that the 2026 IOLTA Grants application is now available. In Massachusetts, the Interest on Lawyers' Trust Accounts (IOLTA) Committee of the Supreme Judicial Court (SJC) collects interest income from participating financial institutions and distributes that income to three charitable entities. One of these entities is the Boston Bar Foundation, the philanthropic affiliate of the Boston Bar Association.

Grant applicants should not rely on past BBF grant making history as a predictor of the 2026 grant cycle. No program is assured of continued funding.

### The Massachusetts IOLTA Program

The Supreme Judicial Court Order limits the use of IOLTA to two purposes: 1) to provide civil legal services to low-income clients and/or 2) to improve the administration of justice. For more information, please visit <http://www.maiolta.org>.

The BBF awards IOLTA funds through a highly competitive application process using review criteria that advance the SJC's mandated use of IOLTA funds.

### Core Funding Objectives of BBF IOLTA Grant Making

The BBF invites applications from eligible non-profit organizations in the Greater Boston area for projects that advance the following objectives:

- Provide civil legal services to low-income persons and/or underserved populations or historically marginalized populations, especially organizations and programs that respond to an identified and unmet legal need.
- Result in the development and strengthening of *pro bono* programs which generate substantial voluntary legal services by the private bar to low-income and underserved populations.
- Conduct activities that demonstrably contribute to the improvement of the administration of justice in Massachusetts, *i.e.*, projects that directly improve the courts' effectiveness, address systemic problems in the court system, or provide information to low-income, underserved, or special needs populations regarding

their legal rights and/or accessibility to the courts.

## Eligibility for a BBF IOLTA Grant

The BBF awards IOLTA grants to organizations. No funding is available for individuals. Priority is given to 501(c)(3) organizations, though under certain circumstances grants may be made to other 501(c) organizations with specific charitable programs that fit the BBF's guidelines and funding priorities.

The BBF's grant making focuses on organizations and programs in the Greater Boston area, *i.e.*, within Route 128. There are, however, limited exceptions: *e.g.*, when a determination is made by the Grants Committee that a substantial percentage of an organization's clients live within Greater Boston, even though the organization may technically be located beyond the boundary of Route 128.

The following are **excluded** from consideration for BBF IOLTA grants:

- Political campaigns; capital campaigns; endowment campaigns; scholarship funds; organizations established primarily to lobby; mock trial programs; law enforcement or correctional agencies; independent conferences/events, research, and/or studies unrelated to a program that delivers legal services or improves access to justice for low-income or underserved populations; funds in support of travel, either by groups or individuals.

BBF IOLTA funding can be used only for programs that involve civil legal issues; programs involving criminal or delinquency legal issues cannot be funded by the IOLTA Grants Program.

IOLTA funds may not be used to support any social service or lobbying components of an applicant's proposed program, or to fund programs that provide for the constitutional or statutory obligations of government.

To receive IOLTA funds from the BBF, a grantee must comply with the following:

1. Submit a complete written proposal pursuant to BBF guidelines and format requirements, with an Executive Summary that is not to exceed one page.
2. Demonstrate a capacity to administer, implement, execute, and evaluate the program for which funds are granted in an effective and efficient manner.
3. Agree to submit a mid-year report of no more than four (4) pages and also a final report summarizing how the funds have been spent, activities undertaken, results attained, and valuable experience or products that could be shared with other agencies, as well as any other information requested by the BBF.
4. Enter into a written agreement with the BBF in which the applicant agrees to comply with all of the grant policies of the BBF and carry out the program for which the funds are requested.

5. Deliver services to clients in a non-discriminatory manner without regard to the clients' race, gender, age, ethnicity, religion, sexual preference, or national origin.
6. Publicly acknowledge the support of the BBF in the organization's written materials.
7. Agree to comply with the BBF's grant management activities, e.g. site visits if necessary.

## **Grant Application Review Criteria**

The BBF awards IOLTA funds in a highly competitive application process using stringent review criteria. The BBF makes funding determinations for eligible non-profit grant applicants based on several criteria, including the program's mission and whether it advances the core funding objectives of the IOLTA program; its financial stability, collaboration, and efficient use of resources; and its demonstrated impact on the community.

### **○ Organizational Mission & Impact**

The BBF supports innovative and supportive civil legal services programs that provide direct representation/advocacy by an attorney for low-income clients on matters relating to legal needs and/or access to the justice system. It also supports programs that train *pro bono* attorneys to manage cases, especially in underserved areas of law.

In making its grant determinations, the BBF will consider organizational impact and effectiveness in fulfilling a compelling unmet legal need, as well as the number of clients served by each project (for projects that serve a relatively small client base, a determination will be made whether the project fills a crucial but unmet need). Grant applicants should clearly outline the legal needs the program will address, as well as the target population for the services.

For programs that seek to improve the administration of justice, preference is given to projects that demonstrably increase the efficiency of the court system and/or address systemic or access issues in the court system, particularly those that affect low-income, underserved, or special needs populations.

### **○ Fiscal stability of the organization and/or sustainability of project**

The BBF awards IOLTA grants to programs which demonstrate fiscal stability and that actively seek financial support from other sources. The BBF favors funding for programs that minimize overhead costs and demonstrate a sound long-term funding plan with a diversified revenue stream. Please note that financial statements and budgets will be carefully reviewed.

### **○ Collaboration**

The BBF favors projects and initiatives that collaborate with existing programs, avoid duplication of services, and maximize available resources to serve unmet current or

emerging legal needs. Projects that demonstrate an innovative approach to the delivery of legal services or access to justice through interdisciplinary collaboration with other service providers working with low-income populations are particularly encouraged to apply.

## **Fiscal Year 2026 Grant Application Timetable**

2026 BBF IOLTA Application Deadline:	April 16, 2026
Notification of Grantees:	July 2026
Grant Agreements:	July 2026
Disbursement of First Half Funds:	September 2026
Semi-Annual Progress Report Due:	March 2026
Disbursement of Second Half Funds:	April 2026
Year-End Report Due:	September 2026

## **Grant Application Review Procedures**

All IOLTA grant applications submitted to the BBF will be screened initially by the BBF staff to establish 1) the eligibility of the applicant to receive IOLTA funds, and 2) that the application is complete and includes the required documentation. Incomplete grant applications may be disqualified from consideration.

All applications will then be submitted to the BBF Grants Committee, which will review the applications received and submit their recommendations to the Board of Trustees of the Boston Bar Foundation for approval. There is no appeal process for funding decisions.

## **Foundant Grant Management Software**

The BBF will be utilizing [Foundant Grant Management Software](#) to facilitate the submission of the FY2026 IOLTA Grant Applications. For more instructions, please use this [link](#) for a tutorial on the GLM Application (New Dashboard). Only applications submitted via Foundant will be considered for this granting cycle.

## **Application Deadline & Submission Information:**

**Fiscal Year 2026 BBF IOLTA Grant applications should be submitted by [Foundant](#).**

**On or before 5 PM, Monday, April 16, 2026:**

**Attachments** – Please upload the following to Foundant:

1. **Audit:** Attach a copy of most recent audit report (one copy only) in the appendix. If not subject to an audit, attach the most recent financial statement and a copy of the most recent IRS Form 990.
2. **Proof of Tax-Exempt Status:** If the organization is recognized as tax-exempt, attach a copy of IRS determination letter(s) in the appendix. If not, describe the charitable activities.
3. **Governing Board:** Attach a list of the current Trustees/Directors.
4. **Collaboration and Partnership:** If the organization is applying for funding in conjunction with another non-profit to assist in the distribution of part or all of its legal services, please provide a letter of partnership from the organization confirming the agreement and roughly outlining the terms of the agreement.

**Use the accompanying Excel document “BBF IOLTA RFP Budget Form FY26” to complete the required budget sheet for the FY 2026 BBF IOLTA Grant Application. This can be found on our website, [link](#).**

**For questions or additional information regarding the application process, please contact Domonique Williams via e-mail [dwilliams@bostonbar.org](mailto:dwilliams@bostonbar.org) or Cecilia Cormier at [ccormier@bostonbar.org](mailto:ccormier@bostonbar.org).**