

SAMPLE NARRATIVE PROPOSAL (PUBLIC SERVICE SUBGRANT PROPOSAL)

A. SUMMARY

The Young Lawyers Division of the East-West Bar Association, in conjunction with the Standing Committee on Law and the Elderly, has decided to focus on the problems confronting a particularly defenseless segment of an already at-risk group, those elderly persons whose mental or physical abilities are so impaired that they are unable to live independently. A decision was made to prepare a handbook to be distributed to all persons appointed to serve as guardians of the impaired elderly, in the hope that education might enable the guardians to better serve the interests of the wards they are commissioned to protect.

The Law and the Elderly Committee has assumed the critical task of writing the handbook, as the members of that Committee are far more familiar with the problem of guardianship abuse and, more importantly, knowledgeable about the ways to avoid the problem. The assistance of the Young Lawyers Division was sought to aid in the publishing and distribution of the handbook. The Young Lawyers Division is seeking a grant from the ABA/YLD Affiliate Outreach Project to help defray the costs of the project. Funds for the remaining costs of the project not covered by the ABA/YLD subgrant will be raised through private solicitations, primarily aimed at the banking and legal communities.

B. INTRODUCTION

The Young Lawyers Section has an outstanding history of public service within our community. We have developed programs within our local schools, participated in food drives and played an active role in the training of new admittees to the Bar by compiling and distributing a voluminous practice guide to all new admittees. In addition, in recent years, our Section has organized and conducted a seminar for all summer associates for the purpose of introducing them to the members of the judiciary in our State.

C. PROJECT OBJECTIVES

The need for education in this area has been identified by practitioners in the field of guardianships, who recount stories of guardians who lose track of assets of the ward, who fail to obtain court approval for significant transactions involving the ward's property, such as the sale of real property, and who do not keep adequate records for the administration of the ward's assets. One of the more poignant accounts our Section received was that of an elderly ward whose daughter, appointed as guardian, failed to administer the ward's accounts properly, thereby rendering her mother ineligible for Medicare coverage. The goal of the project is to educate guardians about their duties and responsibilities for the ward and the ward's assets.

We hope that the handbook, which is designed to be a practical guide to the many requirements and technicalities associated with guardianships, will enable guardians to serve better the persons, often the elderly, whom they are appointed to protect, and to significantly reduce the problems recounted above.

D. PROJECT DESCRIPTION

Guardians who are educated about their responsibilities and are aware of the steps they must take to protect the ward's assets are more likely to act responsibly. Often, assets are squandered because an uninformed guardian is unaware of the actions which are necessary to protect the ward's property. Our project is designed to educate guardians about their obligations toward the ward and their duty to keep the Court informed of the status of the guardianship. At a minimum, we believe that better reporting will result from the use of the handbook.

Records available from the Court of the State indicate that nearly 400 guardianships are initiated each year. Currently there are no formal or informal mechanisms for educating guardians about the responsibilities they are undertaking. We propose to print enough handbooks so that every person appointed to a guardianship is given a handbook and we contemplate revising and reprinting the handbook as appropriate.

The Law and the Elderly Committee is in the final stages of drafting the handbook. When completed, the draft will be reviewed by members of the Court, as well as additional practitioners in the field. Our Section will begin the work of arranging for publication and distributing the handbook once it has been reviewed by the Court.

E. ORGANIZATIONAL STRUCTURE

EAST-WEST BAR ASSOCIATION

Law & Elderly Committee Young Lawyers Division

Court Review Distribution to Guardians

F. EVALUATION

Our Section believes that evaluation input will come from numerous sources, including members of the private bar and public service legal organizations such as Community Legal Aid, as practitioners work with guardians and observe what we hope will be an increased understanding of their responsibilities. We also anticipate that a significant source of comment will be the members of the Court and the staff of the Court who will, hopefully, see improvement in the processing of guardianship matters. After the handbook has been available for six months, we plan to survey members of the private bar to gather information on the handbook's usefulness.

G. FUNDING CAPABILITY

If approved, the ABA/YLD grant will be a building block on which to add the private donations we have solicited, both in the form of cash donations and in-kind contributions. We have obtained three estimates for printing and binding. We anticipate that local banks and law firms will be willing to make other contributions. We plan to print one thousand handbooks in order to ensure that every guardian appointed in the next several years can receive a copy. Beyond that point, if the project proves successful, we will again turn to the additional funding sources described above to obtain funds to cover the printing of additional copies.

H. BUDGET

EXPENSES

Printing

Duplication (1,000 books of 50 pages at .05/page)	\$2500.00*
Binding	300.00*
Design (in-kind donation Style Design)	100.00

Miscellaneous Costs

Postage -Incidental (in-kind donation Sr. Bar)	100.00
Phone (in-kind donation Sr. Bar)	100.00

TOTAL \$3100.00

INCOME

ABA/YLD Subgrant	1,500.00
East-West Young Lawyers Division	500.00
Sunset Senior Citizens Home	500.00
Sr. Bar (in-kind services)	200.00
Style Design Company (in-kind services)	100.00
Solicitation Program	300.00

TOTAL \$3100.00

*Lowest of three estimates

I. TIMETABLE

March	Organize handbook committee
April	Begin writing chapters
May	Revise handbook
June	Final editing
August	Distribution of handbooks
Sept.-Nov.	Workshops/presentations with handbook