

LAWYER TRUST ACCOUNT COMMISSION  
OF THE SUPREME COURT OF IOWA  
INTEREST ON LAWYERS' TRUST ACCOUNT PROGRAM

**Progress Report/Program Evaluation**

Organization Name:	
Name of Contact Person:	Report Period:

Pursuant to Iowa Court Rule 44.4(8), IOLTA grant applicants must report progress and results of IOLTA funding to the Lawyer Trust Account Commission. Reports for July 1 through December 31 grant activities are **due March 1**. Reports for January 1 through June 30 grant activities are due **September 1**. Reports should include the following:

**1) Narrative**

On a separate page, please include the following in your narrative:

- a) Highlights of grant funded activities and progress made toward achieving the goals of the grant during the report period that you wish to share with the commission.
- b) Any challenges you have encountered thus far and how they were or will be resolved.

**2) Statistical Information**

Using the attached form, please provide a summary of statistical information regarding the number of individuals served, helped, etc., because of the IOLTA grant funding.

**3) Financial Report**

The financial report is made using the attached form and should include a specific accounting of the items for which IOLTA funds were used. The accounting should be certified by the responsible financial officer for your organization.

*If you received a grant award for more than one program, please provide a report for each grant.*

Please email the report as an attachment to: [IOLTA@iowacourts.gov](mailto:IOLTA@iowacourts.gov) and include this sheet as a cover sheet. If you have any questions, please do not hesitate to email or call contact the Office of Professional Regulation at 515-348-4670.

# IOWA LTAC COMMISSION

## FY2025-26 Progress Report

<b>Grantee Name:</b>	
<b>Reporting Period:</b>	

		This Reporting Period	Fiscal YTD	Grant Goal (FY2025-26)
<b>Individual Case Services</b> LTAC defines a "case" as the provision of civil legal assistance to an individual with a legal problem.	<b>Cases Closed:</b> (including by pro bono volunteers)			
		This Reporting Period	Fiscal YTD	Grant Goal (FY2025-26)
	<b>People Benefitted:</b>			
		This Reporting Period	Fiscal YTD	Grant Goal (FY2025-26)
<b>Community Legal Education</b>	<b>People who received service:</b> (community group presentations & informational brochures)			
<b>Pro Se Assistance</b>	<b>People who received service:</b> (clinics, court help centers, printed pro se forms/packets)			
<b>Referrals</b>	<b>People who received service:</b> (via hotlines or otherwise, and made to civil legal aid or social services provider, bar association, Legal Referral Service, or other)			
<b>Online Outreach</b>	<b>People who received service:</b> (legal information downloads & completed forms)			
<b>Pro Bono Services</b>	<b>Pro Bono Volunteers enrolled:</b>			
<b>Group Services</b>	<b>Groups Benefitted:</b> (significant services provided (open & closed cases) for nonprofits or other group entities)			

# IOWA LTAC COMMISSION

## Financial Report

Name of Grantee: \_\_\_\_\_

\_\_\_\_\_ Interim Report (due March 1 for July-Dec.)

\_\_\_\_\_ Final Report (due Sept. 1 for Jan.-June)

	IOLTA Fund Carryover	IOLTA Funds Current Award	IOLTA Fund Total	IOLTA Funds Expended This Period	Balance at End of This Period
<b>A. Personnel Costs</b>					
Lawyers No. _____					
Paralegals No. _____					
Others No. _____					
Salary Subtotal					
Employee Benefits					
<b>Total Personnel Costs</b>					
<b>B. Non-Personnel Costs</b>					
Space					
Equipment Rental					
Supplies					
Telephone					
Travel					
Training					
Library					
Insurance					
Audit					
Litigation					
Capital Additions					
Contract Services					
Other					
<b>Total Non-Personnel Costs</b>					
<b>C. TOTAL</b>					