



JUDICIAL COUNCIL OF CALIFORNIA

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REPORT TO THE JUDICIAL COUNCIL

Item No.: 20-071

For business meeting on: September 24–25, 2020

Title

Equal Access Fund: Distribution of Funds
for Partnership Grants and IOLTA-Formula
Grants

Agenda Item Type

Action Required

Effective Date

September 25, 2020

Rules, Forms, Standards, or Statutes Affected

None

Date of Report

September 8, 2020

Recommended by

State Bar Legal Services Trust Fund
Commission
Banafsheh Akhlaghi, Chair

Contact

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Executive Summary

The Budget Act of 2020 includes over \$23 million in the Equal Access Fund for general distribution to legal services providers and support centers. The funds are to be distributed primarily in two parts: IOLTA (Interest on Lawyers' Trust Accounts)-formula grants and partnership grants (with a small amount also distributed for administration). The Legal Services Trust Fund Commission of the State Bar recommends approving distribution of \$21,169,328 in IOLTA-formula grants for fiscal year (FY) 2020–21, according to the statutory formula in the state Budget Act, and \$2,423,410 in partnership grants for 2021. The commission further requests approval of its findings that the proposed budget for each individual grant complies with statutory and other relevant guidelines.

Recommendation

The Legal Services Trust Fund Commission recommends that the Judicial Council, effective September 25, 2020, approve:

1. The distribution of \$21,169,328 in IOLTA-formula grants for FY 2020–21 according to the terms of the state Budget Act;

2. The commission's determination that the proposed budget of each individual grant complies with statutory and other guidelines; and
3. The distribution of \$2,423,410 in Equal Access Fund partnership grants to the following legal services agencies for programs conducted jointly with courts to provide legal assistance to self-represented litigants:
 - a. **Bet Tzedek Legal Services**
 Self-Help Elder and Dependent Adult Restraining Order Clinic
 (Los Angeles County)\$78,491
 - b. **Central California Legal Services, Inc.**
 Guardianship Project.....\$58,868
 Tenant/Landlord Housing Law Project (Fresno)\$68,680
 Tulare County Unlawful Detainer Workshop.....\$68,680
 - c. **Community Legal Aid SoCal**
 Orange County Community Court Clinic\$34,340
 Orange County Consumer Debt Workshop\$22,566
 Unlawful Detainer Workshop at Norwalk Courthouse (Los Angeles).....\$68,680
 - d. **Elder Law and Advocacy**
 Imperial County Unlawful Detainer/Elder Abuse Restraining Order Clinic.....\$69,661
 - e. **Family Violence Law Center**
 Domestic Violence Pro Per Project (Alameda)\$24,528
 - f. **Housing and Economic Rights Advocates**
 Probate Clinic (San Mateo).....\$41,208
 - g. **Inland Counties Legal Services**
 Consumer Clinic Partnership (San Bernardino).....\$92,227
 - h. **Justice and Diversity Center**
 Family Law Assisted Self-Help/Case Resolution (FLASH/CARE) Project
 (San Francisco)\$39,246
 Shriver-SASH Self-Help Custody (San Francisco)\$72,604
 - i. **LACBA (Los Angeles County Bar Association) Counsel for Justice**
 Domestic Violence Legal Services Project (Los Angeles)\$89,284
 - j. **Legal Access Alameda**
 Alameda County Family Law Day of Court Project\$29,434
 Family Law Status Conference Project.....\$63,774

k. Legal Aid Foundation of Los Angeles	
Torrance Self-Help Center	\$88,302
l. Legal Aid Foundation of Santa Barbara	
Legal Resource Center Partnership (Lompoc and Santa Barbara)	\$114,793
m. Legal Aid of Marin	
Community Court Expansion	\$78,491
n. Legal Aid Society of San Bernardino	
Caregivers Accessing Justice Guardianship Program.....	\$98,114
o. Legal Aid Society of San Diego, Inc.	
Name & Gender Marker Change Clinic	\$83,397
Unlawful Detainer Clinic Expansion Project.....	\$78,491
p. Legal Assistance for Seniors	
Partnership to Assist Guardianship Litigants (Alameda).....	\$63,774
Partnership to Assist Limited Conservatorship Litigants (Alameda)	\$63,774
q. Legal Services of Northern California	
Mother Lode Pro Per Project (Amador, Calaveras, El Dorado, Placer, Nevada & Sierra)	\$93,208
Small Claims & Guardianship Self-Help Project (Yolo).....	\$60,831
r. Neighborhood Legal Services of Los Angeles County	
Consumer Technology Project	\$88,302
Housing Cases Continuum of Services	\$79,472
Stabilizing Families	\$98,114
s. Public Counsel	
Guardianship Clinic (Los Angeles)	\$29,434
t. Public Law Center	
De Facto and Adoptive Parent Assistance Project.....	\$49,057
Orange County Courthouse Guardianship Clinic	\$39,245
u. Riverside Legal Aid	
Small Estates Assistance Program	\$98,114
v. San Diego Volunteer Lawyers Program	
Central Division Restraining Order Clinic	\$98,114

w. San Luis Obispo Legal Aid Foundation

Rental Clinic\$98,114

Total **\$2,423,410**

See Attachment A, *Equal Access Fund: Distribution of Funds for Partnership Grants and IOLTA-Formula Grants under the Budget Act of 2020*, for the text of the commission’s report and the report’s attachments.

Relevant Previous Council Action

The Judicial Council has approved the proposed distribution of Partnership Grants and IOLTA-formula funds for each of the past 20 years based on the recommendations of the Legal Services Trust Fund Commission.

Analysis/Rationale

Since 1999, the state Budget Act has contained a provision for the allotment of \$10 million to an Equal Access Fund “to improve equal access and the fair administration of justice.” In 2018, an additional ongoing \$10 million was added to the fund.

In 2005, the Uniform Civil Fees and Standard Fee Schedule Act was approved by the California Legislature and the Governor. That act established a new distribution of \$4.80 per filing fee to the Equal Access Fund. The estimated revenue from filing fees for the fund is \$3,389,900 this year. Those revenues have been collected by the trial courts since January 2007.

The Budget Act requires the Judicial Council to distribute the Equal Access Fund monies to legal services providers through the State Bar Legal Services Trust Fund Commission. The State Bar created the commission to administer the law regulating attorneys’ interest-bearing trust accounts (IOLTAs). (Bus. & Prof. Code, § 6210 et seq.; State Bar, *Rules Regulating Interest-Bearing Trust Fund Accounts for the Provision of Legal Services to Indigent Persons* [adopted Sept. 1982, amended Mar. 2002], rule 4.)

The Budget Act states that “[t]he Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines.... The Judicial Council may establish additional reporting or quality control requirements....”¹ All recipients of partnership grants are required to conduct an annual evaluation of the effectiveness of the programs and submit their evaluation results to the commission by March 1 of the following year—for this round, 2022.

The Chief Justice, as chair of the Judicial Council, appoints one-third of the voting members to the commission—five attorney members and two public members, one of whom is a court administrator. The Chief Justice also appoints three nonvoting judges to the commission—two

¹ Relevant portions of the Budget Act are in the commission’s report (Attachment A), at pages 20–22.

trial court judges and one appellate justice. The membership roster is in the commission's report (Attachment A) at pages 18–19.

There are two grant programs, IOLTA-formula grants and partnership grants. The Budget Act provides that 90 percent of the funds be distributed to legal services agencies according to a statutory formula (the IOLTA-formula grants). The remaining 10 percent of the funds are to be distributed as partnership grants to legal services programs for projects conducted jointly with the courts to provide legal assistance to self-represented litigants. The competitive process for soliciting, reviewing, and selecting the legal services programs to receive these partnership grants is stated in the commission's report at pages 12–16.

For the grant period funded by the 2020 Budget Act, the Legal Services Trust Fund Commission has approved a schedule for allocation of the part of the Equal Access Fund grants referred to as IOLTA-Formula Grants to legal services providers according to the formula established under the Business and Professions Code.

The commission's report on the allocation of the Equal Access Fund shows that the commission has followed the statutory requirements and the additional criteria adopted by the council at its August 1999 meeting. Therefore, it is appropriate for the Judicial Council to approve the distribution of \$21,169,328 in IOLTA-formula grants awarded by the Legal Services Trust Fund Commission to allow distribution to the eligible organizations. It is also appropriate for the council to approve \$2,423,410 in partnership grants.

Distributing the funds to the commission will allow it to carry out the terms of the Budget Act and will put the monies of the Equal Access Fund into the hands of legal services providers to supply legal assistance to self-represented litigants. Grants are to be distributed on a calendar-year basis beginning January 1, 2021.

Policy implications

This recommendation helps implement Goal I of the Judicial Council's strategic plan—Access, Fairness, and Diversity—by increasing representation for low-income persons.

Comments

The recommendations have been approved by the Legal Services Trust Fund Commission and its Partnership Grants Committee, as required by law. The statutory scheme does not contemplate public comment.

Alternatives considered

There are no viable alternatives to distributing the funds according to the recommendations of the Legal Services Trust Fund Commission. The Budget Act requires the council to approve the distribution if it finds that the statutory and other relevant guidelines are met.

Fiscal and Operational Impacts

The IOLTA-formula grants require no court implementation. Partnership grants will require the courts that have elected to participate in joint projects with local legal services providers to cooperate in the manner proposed in their grant applications.

Council staff will work with the staff of the Legal Services Trust Fund Commission to oversee administration of the Equal Access Fund, including fulfillment of requirements for reports on the commission's administration of the fund. Staff will also provide support to the commission (including the third of its members appointed by the Chief Justice) to facilitate administration of the Equal Access Fund.

The recommendation contained in this report will have no direct fiscal effect on the courts. Nevertheless, the courts will indirectly benefit from assistance provided to self-represented litigants. Council staff support will be covered by the provision for administrative costs in the Budget Act appropriation.

Attachments

1. Attachment A: *Equal Access Fund: Distribution of Funds for Partnership Grants and IOLTA-Formula Grants under the Budget Act of 2020.*



The State Bar of California

ATTACHMENT A to the report: Equal Access Fund: Distribution of Funding for Partnership Grants and IOLTA-Formula Grants under the Budget Act of 2020

DATE: September 18, 2020

TO: The Judicial Council of California

FROM: Doan Nguyen, Acting Program Manager, Office of Access & Inclusion

CC: Banafsheh Akhlaghi, Chair, Legal Services Trust Fund Commission

SUBJECT: Equal Access Fund: Distribution of Funding for IOLTA-Formula Grants and Partnership Grants Under the Budget Act of 2020

EXECUTIVE SUMMARY

In 1999, the State Budget Act added the Equal Access Fund (EAF) to the judicial branch budget to provide grants for free legal assistance to indigent Californians. These grants are administered through the Legal Services Trust Fund Commission of the State Bar of California, but recommendations for the distribution of the grant funds must be approved by the Judicial Council.

The Equal Access Fund is distributed in two parts: 1) 90 percent of the funds are distributed according to the statutory Interest on Lawyers' Trust Accounts ("IOLTA") formula and, 2) 10 percent of the funds are distributed as Partnership Grants, i.e., discretionary grants for joint projects between court and legal service programs to provide legal assistance at or near court houses to pro per litigants.

CURRENT 2020 GRANT CYCLE

Pursuant to the Judicial Council's approval of recommended EAF grants last year, the State Bar is currently administering the 2020 EAF IOLTA-formula and Partnership Grants.

EAF IOLTA-formula Grants

The \$23,520,471 allocated for 2020 EAF IOLTA-formula Grants is funding a wide range of legal services for low-income Californians. These grant funds were allocated according to a formula

set forth in the IOLTA statute (Business & Professions Code §§ 6210 et. Seq.) and pursuant to established procedures for determining eligibility and administering grants.

Partnership Grants

The \$2,666,000 approved for 2020 Partnership Grants provides support for 38 projects from 27 organizations that enhance the ability of unrepresented litigants to pursue justice in civil courts across California..

Any EAF funds not distributed as grants, are held in reserve¹ for potential shortfalls in filing fee revenue or other future distributions. As of June 30, 2020, this amount was \$350,738. A system of grant application, budget review, performance reports, and monitoring visits is used to ensure compliance with grant requirements.

2021 DISTRIBUTION REQUEST TO THE COUNCIL

The State Bar formally requests that the Judicial Council approve (1) the distribution of \$23,722,000 pursuant to the Budget Act of 2020, for EAF IOLTA-formula Grants and Partnership Grants for the 2021 calendar year and costs of administration; and (2) approve the grants specified below as follows:²

EAF IOLTA-formula Grants

The State Bar requests that the Judicial Council approve 2021 EAF IOLTA-formula Grants in the total amount of \$21,169,328, which includes the General Fund Budget Act allocation of \$18,352,800, projected filing fee revenue of \$2,565,000 (subtotaling \$20,917,800), and prior year returned and adjusted grants totaling \$251,528. At its August 14, 2020 meeting, the Commission identified the legal services providers eligible for this funding consistent with the requirements of state law and State Bar rules governing administration of the Legal Services Trust Fund Program. The State Bar will calculate the appropriate allocation of funds available for EAF IOLTA-formula Grants under the Budget Act of 2020. The Commission will then review proposed budgets for expenditure of these funds, to ensure grantee compliance with the statute, rules and guidelines, prior to distribution of grant funds.

Partnership Grants

The State Bar requests the Judicial Council approve the distribution of \$2,324,200 for 2021 Partnership grants; and further requests the Judicial Council approve the Commission's recommendations for Partnership Grants for calendar year 2021 in the total amount of \$2,423,410, which includes the General Fund Budget Act allocation of \$2,039,200, projected filing fee revenue of \$285,000, and \$99,210 of returned funds from prior years. These discretionary grants are being awarded exclusively to organizations that are eligible for IOLTA

¹ As of December 31, 2019, the EAF reserve is \$2,728,386; we anticipate the reserve will be reduced by approximately \$620,337 in 2020 to cover shortfalls in funding.

² The sum actually allocated as grants may vary from this figure by a negligible amount due to rounding.

funding, after a careful analysis of grant proposals, based on established criteria. Partnership Grants will, upon approval, be distributed as early in 2021 as practicable to projects that have completed the required documentation.

Administrative Allocation

The State Bar also requests that the Judicial Council approve distribution of \$480,000 for administrative costs of the State Bar pursuant to the Budget Act, including \$330,000 from the General Fund Budget Act allocation and \$150,000 of filing fee revenue.

DISCUSSION

INTRODUCTION – THE BUDGET ACT

The Equal Access Fund has been an important source of funding for legal services programs since it was initially established in the Budget Act of 1999. The budget act identifies two separate uses for the money appropriated to the EAF:

- Ninety percent of the grant funds are to be distributed to IOLTA-eligible legal services providers according to a formula set forth in California’s IOLTA statute. These are known as “IOLTA-formula” grants.
- Ten percent of the grant funds are set aside for Partnership Grants to IOLTA-eligible legal services providers for “joint projects of court and legal services programs to make legal assistance available to pro per litigants.” These are known as “Partnership” grants.

All funds are to be distributed in grants administered by the Legal Services Trust Fund Commission. The budget also provides a small distribution for funds for the cost of administration; relevant portions of the Budget Act of 2020 are included in Attachment A2.

The initial appropriation to the EAF in 1999 was \$10 million. This amount has since been increased with the addition of State Appropriation Limit (SAL) funding for a few years, filing fee revenue,³ and the occasional appropriation of additional general fund monies.⁴ The 2020 Budget Act appropriates \$23,722,000 for the Equal Access Fund’s IOLTA-formula and Partnership Grants, being the sum of the General Fund allocation of \$20,392,000 and the

³ Since 2006, the Budget Act has allocated \$4.80 from first paper filing fees to the Equal Access Fund, with 90 percent of these funds directed to IOLTA-Formula grants and 10 percent reserved for Partnership Grants, in separate but identically-worded schedules of the Budget Act.

⁴ The Legislature provided a onetime increase of \$20 million to the Equal Access Fund in 2019 to provide legal assistance in homelessness prevention. Additionally, new legislation passed in June 2020 (AB 83, Ch. 15, Stats. 2020) allocates \$31 million from the National Mortgage Special Deposit Fund to the Judicial Council for distribution through the State Bar for eviction defense or other tenant defense assistance in landlord-tenant disputes; these funds are not part of the Equal Access Fund and not included here.

allocation of \$2,850,000⁵ under the Uniform Civil Fees and Standard Fee Schedule Act; plus an allocation of \$480,000 for administrative costs of which \$330,000 is drawn from the General Fund Budget Act allocation and \$150,000 from filing fee revenue.

Total available funding for 2021 IOLTA-formula and Partnership grants also includes returned or residuary funds specific to each grants program. Including these additional funds, total available funding for IOLTA-formula grants is \$21,169,328: \$20,917,800 from the Budget Act and an additional \$251,528 from previous adjusted grants and residual funds. Total available funding for Partnership Grants is \$2,423,410: \$2,324,200 from the Budget Act and an additional \$99,210 of residual funds.

THE LEGAL SERVICES GRANTS PROGRAM

Eligibility for Grants

EAF grants are to be distributed “to qualified legal services projects and support centers as defined in § 6213 through § 6215 of the Business and Professions Code.” Those provisions of the IOLTA statute establish the basic eligibility requirements for the two categories of organizations that are entitled to receive funding:

- “Legal Services Projects,” which have as their primary purpose the provision of legal services in civil matters directly to indigent clients without charge; and [Business and Professions Code §6213(a)]
- “Support Centers,” which provide training, technical assistance and advocacy support to the legal services projects on a statewide basis. [Business and Professions Code § 6213(b)]

All State Bar grantees must be nonprofit corporations, must maintain quality control procedures approved by the Commission, and must meet minimum funding and service criteria that are set out in Business and Professions Code §§ 6214-6215. The IOLTA statute requires recipient legal services projects to use these grants to provide free civil legal services to indigent persons in the counties for which the funds are allocated. In addition, legal services projects must make extra efforts to increase services to especially disadvantaged and underserved client groups. Recipient support centers must publicize the availability of their services and demonstrate that they actually provide legal support without charge to qualified legal services projects on a statewide basis.⁶

Administration and Oversight

Oversight begins with the annual application for funding. The application includes extensive information about the legal services provider’s activities and services, accompanied by an annual financial statement that must be audited (or reviewed, if gross expenditures are less

⁵ This represents the smallest filing fee allocation since this funding was first authorized, down from a high of \$6,746,491 in 2009, due to the impact of COVID-19 on court operations.

⁶ Business and Professions Code, §§ 6218, 6220, 6221, 6223.

than \$500,000) by an independent certified public accountant. Following the Commission's determination of eligibility and allocation of IOLTA-Formula Grant amounts, each applicant submits a proposed budget for use of the funds, with a narrative description of the services to be provided and how the efficacy and impact of those services will be measured and maximized. The Commission reviews this budget to ensure that it complies with the requirements noted above before any funds are actually distributed. Requirements regarding eligibility and use of funds are reflected in regulating rules and grant conditions approved by the State Bar, and are incorporated into a written agreement with each grant recipient. After the grant year concludes, grant recipients provide written reports of their expenditure of grant funds, services provided, clients or customers served, and the impact of their services.

Monitoring visits supplement review of the annual funding application and budget documentation to ensure compliance with statutory requirements and grant conditions as well as to evaluate provider effectiveness and validate the provider's fiscal practices for the handling of grant funds. State Bar staff, sometimes joined by Commission members and Judicial Council staff, conduct these visits on a three-year cycle. While monitoring has typically been conducted on-site, due to the COVID-19 pandemic and in coordination with the Judicial Council, it is currently being conducted by videoconference until it is safe to resume in-person visits.

EQUAL ACCESS FUND GRANTS

IOLTA-Formula Equal Access Grants

The Budget Act requires that 90 percent of the Equal Access Fund be distributed to qualified organizations under the statutory allocation formula found at Business and Professions Code section 6216:

- Fifteen percent of the grant money is reserved for Support Centers and is divided among those centers equally.
- The remaining eighty-five percent of the funds is allocated among all California counties based on poverty population, and then within each county among legal services projects based on the amount each such organization spent in the prior calendar year providing free legal services to the indigent in that county. Programs that utilize volunteers as their principal means of delivering legal services share an additional allocation in each county where they so qualify.

The \$23,520,471 approved for 2020 IOLTA-Formula Grants is supporting 99 non-profit legal services organizations: 77 Legal Services Projects and 22 Support Centers. The funds are helping the most vulnerable Californians when they face critical, life-changing legal issues affecting basic needs, safety, and security. Grantees handle a wide variety of legal issues, including but not limited to elder abuse, domestic violence, family support, housing, and access to health care. Among those served are the working poor, children, people who live in isolated rural areas, veterans, people with limited English proficiency, people suffering abuse, people with disabilities, and the elderly. The statewide pandemic has only exacerbated the severity of these issues, and made the funded legal services that much more valuable.

A list of the 2021 grant recipients under the Budget Act of 2020 is included as Attachment A3.

Partnership Grants

The Budget Act reserves 10 percent of the Equal Access Fund for joint projects of court and legal services programs to make legal assistance available to pro per litigants – the Partnership Grants program. Partnership Grants are restricted to Qualified Legal Services Projects under Business and Professions Code section 6213(a). In the 2021 grant cycle, \$2,423,410 is available for Partnership Grants, which includes \$2,324,200 of funding appropriated in the Budget Act of 2020, and an additional \$99,210 in residual amounts remaining from prior years.

Selection Criteria for Partnership Grants: The Budget Act identifies four essential elements for Partnership Grants:

- 1) Recipients must be eligible for Legal Services Trust Fund Program grants.
- 2) The funds must be used for joint projects of legal services programs and courts.
- 3) The services must be for “indigent persons.”
- 4) The services must be for self-represented litigants.

In 2018, in conjunction with the Judicial Council, the Commission articulated funding priorities to guide the allocation of available funding among eligible proposals. The primary focus of these grants is to “seed” new projects with start-up funding. The Commission also prioritized funding for projects in their second to fifth year of funding, and for projects requesting funding beyond a fifth year that serve rural areas, that are responsive to a recent emergency or disaster, or that are high-functioning and heavily-utilized but have been unable to secure alternate funding despite documented efforts. Projects seeking funding beyond a fifth year that are not in these priority areas are considered for funding only after proposed awards have been identified for all prioritized projects.

As in past years, proposals for 2021 Partnership Grants span a wide range of substantive, procedural, technological, and programmatic solutions. All proposals were required to include the following:

- A letter of support from the applicable court’s presiding judge.
- A written Memorandum of Understanding between the legal services programs and the cooperating court indicating how the joint project, the court, and any existing self-help center, including the family law facilitator (as appropriate), will work together.
- A plan for an appropriate level of direct supervision of paralegals and other support staff by a qualified attorney.
- A plan to anticipate and meet the needs of litigants who are not within the legal services provider’s service area or are ineligible for their services.
- A plan to address the needs of unrepresented litigants who do not meet the financial eligibility requirements (e.g., by providing general information in the form of local information sheets, videos, workshops, etc.).
- A clearly stated policy regarding administration of financial eligibility standards, and established protocols to observe that policy.
- Protocols to minimize conflicts of interest, or to address them as needed, and to ensure

the impartiality of services.

- A plan for project continuity, including efforts to identify and secure additional funding and support.
- A multi-phase evaluation plan including such components as surveys, interviews, focus groups, courtroom observations, and file reviews, with a commitment to report on both qualitative and quantitative project results within three months of the end of the grant year.

Because all recipients of the Partnership Grants already receive IOLTA and EAF IOLTA-Formula Grants through the State Bar, they are already subject to requirements for oversight and reporting that are in place, including monitoring visits to each organization every three years.

A total of \$2,666,000 has been awarded to 38 Partnership grant projects for 2020. These projects are working to enhance the ability of unrepresented litigants to pursue justice in civil courts across California, despite the impact of shelter-in-place orders and court closures on these courthouse-based projects. An April survey indicated that all the currently-funded projects have been impacted by the pandemic, but that substantially all had already begun using technology to provide legal services remotely rather than in-person.

In the 2021 grant cycle, \$2,423,410 is available for Partnership Grants, which includes \$2,324,200 of funding appropriated in the Budget Act of 2020, and an additional \$99,210 in residual amounts remaining from prior years.

Application and Selection of Partnership Grants: The Request for Proposals for Partnership Grant projects for calendar year 2021 was released to legal services organizations and local court personnel in January and was due on March 16, 2020. (A copy of this RFP and a sample application are Attachment A4.) The Partnership Grants Committee of the Legal Services Trust Fund Commission carefully reviewed and discussed the proposals.

Because the due date for submitting the 2021 applications fell three days before Governor Newsom's COVID-19 shelter-in-place order, applicants for 2021 funding were asked in July 2021 to revise their proposals as necessary to reflect the impact of court closure orders on the anticipated activities or services initially described in their grant proposals. Projects generally reported an expectation that, by 2021, in-court services would have substantially resumed, but acknowledged uncertainty about timelines and were prepared to provide interim services from other locations by using telephones, videoconferencing, email, document drop-offs and pick-ups, and similar tools and technologies.

The Committee considered these revisions at its August 11, 2020 meeting, and approved funding recommendations which it presented to the full Commission at its August 14, 2020 meeting. The Commission adopted those recommendations and presents them now to the Judicial Council. The Council has final responsibility for approving the Commission's recommendations for grant awards at its September 2020 meeting.

Overview of 2021 Applications and Proposed Grants. For the \$2,423,410 allocated to Partnership Grants, the Commission reviewed 35 applications from 23 legal services programs, serving 21 counties with a wide range of substantive areas of law, and numerous types of services to be provided.

After review and discussion of all proposals, the Commission identified a recommended allocation for each project requesting funding in 2021, in the amount stated in the chart below. The Commission requests the Council's approval for the following Partnership grant awards.

Applicant	Project	County (Branch)	Recommendation
Bet Tzedek Legal Services	Self-Help Elder and Dependent Adult Restraining Order Clinic	Los Angeles (Mosk)	\$78,491
Central California Legal Services	Guardianship Project	Fresno	\$58,868
Central California Legal Services	Tenant/Landlord Housing Law Project	Fresno	\$68,680
Central California Legal Services	Unlawful Detainer Workshop	Tulare	\$68,680
Community Legal Aid – SoCal	Community Court Clinic	Orange (Santa Ana)	\$34,340
Community Legal Aid – SoCal	Consumer Debt Workshop	Orange (Santa Ana)	\$22,566
Community Legal Aid – SoCal	Unlawful Detainer Workshop	Los Angeles (Norwalk)	\$68,680
Elder Law & Advocacy	Unlawful Detainer/Elder Abuse Restraining Order Self-Help Clinic	Imperial	\$69,661
Family Violence Law Center	Domestic Violence Pro Per Project	Alameda (Hayward)	\$24,528
Housing and Economic Rights Advocates	Probate Clinic	San Mateo (Redwood City, South San Francisco)	\$41,208
Inland Counties Legal Services	Consumer Clinic Partnership	San Bernardino	\$92,227
Justice & Diversity Center of The Bar Association of San Francisco	FLASH-CARE	San Francisco	\$39,246
Justice & Diversity Center of The Bar Association of San Francisco	SASH Self-Help	San Francisco	\$72,604
LACBA Counsel for Justice	Domestic Violence Legal Services Project	Los Angeles (Mosk)	\$89,284
Legal Access Alameda	Family Law Day of Court Project	Alameda (Hayward)	\$29,434

Legal Access Alameda	Family Law Status Conference Project	Alameda (Hayward)	\$63,774
Legal Aid Foundation of Los Angeles	Self-Help Center	Los Angeles (Torrance)	\$88,302
Legal Aid Foundation of Santa Barbara County	Legal Resource Center Partnership	Santa Barbara (Lompoc, Santa Barbara)	\$114,793
Legal Aid of Marin	Mandatory Settlement Conferences for Homelessness Prevention	Marin	\$78,491
Legal Aid Society of San Bernardino	Caregivers Accessing Justice	San Bernardino	\$98,114
Legal Aid Society of San Diego	Name Change & Gender Marker Change Self-Help Clinic	San Diego (Hall of Justice)	\$83,397
Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion	San Diego (Hall of Justice)	\$78,491
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	Alameda (Berkeley, Hayward, Wiley Manuel)	\$63,774
Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	Alameda (Berkeley, Hayward, Wiley Manuel)	\$63,774
Legal Services of Northern California	Mother Lode Pro Per Project	Amador, Calaveras, El Dorado, Placer, Nevada, Sierra	\$93,208
Legal Services of Northern California	Small Claims and Guardianship Self-Help Project	Yolo	\$60,831
Neighborhood Legal Services	Consumer Technology Project	Los Angeles (Chatsworth)	\$88,302
Neighborhood Legal Services	Housing Cases Continuum of Services	Los Angeles (Pasadena)	\$79,472
Neighborhood Legal Services	Stabilizing Families	Los Angeles (Antelope Valley, Van Nuys)	\$98,114
Public Counsel	Guardianship Clinic	Los Angeles (Mosk)	\$29,434
Public Law Center	De Facto & Adoptive Parent Assistance Project	Orange (Lamoreaux)	\$49,057
Public Law Center	Courthouse Guardianship Clinic	Orange (Santa Ana)	\$39,246
Riverside Legal Aid	Small Estates Assistance Program	Riverside	\$98,114

San Diego Volunteer Lawyer Program	Restraining Order Clinic	San Diego (Central)	\$98,114
San Luis Obispo Legal Aid Foundation	Rental Clinic	San Luis Obispo	\$98,114

Total Amount of All Recommended 2021 Partnership Grant Awards: \$2,423,410.

Attachment A5 is a brief summary of each project.

NEXT STEPS: LEGAL SERVICES TRUST FUND COMMISSION AND JUDICIAL COUNCIL

Legal Services Trust Fund Commission

The Commission has finalized the determination of eligibility of applicants at its August 14 meeting and will provide grantees tentative IOLTA-Formula Equal Access Fund Grant allocation amounts by August 21, 2020. Each grant recipient is required to prepare a detailed line-item budget for its EAF IOLTA-Formula Grant. Those detailed budgets will be reviewed by State Bar staff, and presented to the Commission for approval at its November 13, 2020 meeting. Thereafter, the State Bar will sign a grant agreement with each recipient program. (Attachment A6 is a standard version of the grant agreements used for 2020 grants.)

The Commission, working through staff, will be responsible for the administration of these Equal Access Funds. The Commission will continue its oversight of the EAF Grant program, including through the onsite triennial monitoring of all recipients and review of programmatic and expenditure reports.

The State Bar staff will continue to work closely with Judicial Council staff to require appropriate evaluation of the use of grant funding. State Bar staff continues to encourage legal services providers to use evaluative tools to make critical assessments of their work and its impact on the communities they serve. Additionally, staff will continue to assess outcome reports and analyze the economic benefits from legal services as we strive to communicate the importance of including legal aid in the safety net for low-income Californians.

Judicial Council

The Budget Act provides that “the Judicial Council shall approve awards made by the Commission if the Council determines that the awards comply with statutory and other relevant guidelines.” It is now timely and appropriate for the Council to approve:

The distribution of \$20,917,800 in four equal disbursements for IOLTA-Formula Grants to legal services providers determined by the Commission to be in compliance with statutory and other applicable guidelines, in the amounts identified in Attachment A3. The funds will be paid out to the eligible legal services programs quarterly (or as close to quarterly as possible depending on

contract timing), for the period October 1, 2020 through September 30, 2021 (covering the last quarter of the 2020 grant year and the first 3 quarters of the 2021 grant year).⁷

The distribution of \$2,324,200 for Partnership Grants, and the approval of the Partnership Grants recommended by the Legal Services Trust Fund Commission as set forth in detail in Attachment A5, to be disbursed to each grantee as a lump sum as early in 2021 as possible.

SUMMARY OF COUNCIL ACTION REQUESTED

In conclusion, the State Bar requests that the Judicial Council approve a distribution of \$23,722,000 to the State Bar pursuant to the Budget Act of 2020. This sum includes:

- (1) \$23,242,000 of funding for Equal Access Fund grants, including a General Fund allocation of \$20,392,000 and additional filing fee revenue of \$2,850,000 under the Uniform Civil Fees and Standard Fee Schedule Act. By the terms of the Budget Act, \$20,917,800 (90 percent) of these funds is allocated to EAF IOLTA-Formula Grants and \$2,324,200 (10 percent) is allocated to Partnership Grants.
- (2) \$480,000 for administrative costs pursuant to the Budget Act, comprised of \$330,000 from the General Fund allocation and \$150,000 of filing fee revenue.

As further noted above, the State Bar requests that the Judicial Council approve 2021 EAF IOLTA-formula Grants totaling \$21,169,328 and 2021 Partnership Grants totaling \$2,423,410 as recommended by the Commission, which includes returned and residuary funding of \$251,528 for IOLTA-formula Grants and \$99,210 for Partnership Grants. Council approval is necessary to enable timely distribution of funds.

ATTACHMENTS LIST

- A1.** Legal Services Trust Fund Commission Roster as of August 14, 2020
- A2.** Relevant Portions of the 2020 State Budget Act
- A3.** IOLTA-Formula Equal Access Fund Grant Recipients for 2021
- A4.** Request for Proposals and Sample Application for 2021 Partnership Grants
- A5.** Summary of Proposals Recommended for 2021 Partnership Grants
- A6.** Sample Grant Agreement for 2020 IOLTA-Formula Equal Access Fund Grants

⁷ Due to adjustments in the grant calendar, since 2016 the Equal Access Fund's IOLTA Formula grant funding cycle has included three quarters funded from one Budget Act, and one quarter funded from the subsequent Budget Act. Thus, the first three quarters of calendar year 2021 are funded from funds appropriated in the 2020 Budget Act, and the projected funding for the period from October through December 2021 is from the 2021 Budget Act. The Grant Agreement provides that that funding is contingent on the appropriation and availability of funds.

**LEGAL SERVICES TRUST FUND COMMISSION 2019-2020
OPEN ROSTER**

Banafsheh Akhlaghi, Chair (2023) email: bakhlaghi1600@gmail.com (Judicial Council appointee)	J. Eric Isken, Vice-Chair (2024) Retired email: eric.isken@outlook.com (State Bar appointee)
Amin Al-Sarraf (2024) email: aalsarraf@glaserweil.com (State Bar appointee)	Kim Bartleson (2021) email: kimb@humboldtcourt.ca.gov (Judicial Council appointee)
Hon. Louise Bayles-Fightmaster (2021) email: lbfjd@yahoo.com (Judicial Council appointee)	Pamela M. Bennett (2022) email: pambers1962@gmail.com (State Bar appointee)
Will Boschelli (2023) email: william.boschelli@gmail.com (State Bar appointee)	Erica Connolly (2022) email: Erica.connolly@doj.ca.gov (State Bar appointee)
Prof. Herman L. DeBose (2021) email: herman.debose@csun.edu (Judicial Council appointee)	Prof. Rebecca Delfino (2021) email: Rebecca.Delfino@lls.edu (Judicial Council appointee)
Corey N. Friedman, (2022) email: cfriedman@dir.ca.gov (Judicial Council appointee)	Zahirah Mann (2023) email: mann@rmpf.org (State Bar appointee)

**LEGAL SERVICES TRUST FUND COMMISSION 2019-2020
OPEN ROSTER**

<p>Prof. James Meeker (2023)</p> <p>email: jwmeeker@uci.edu</p> <p>(State Bar Appointee)</p>	<p>Debra Meyers (2023)</p> <p>email: debrakmeyers@gmail.com</p> <p>(Judicial Council appointee)</p>
<p>Bob Planthold (2023)</p> <p>email: political_bob@att.net</p> <p>(State Bar appointee)</p>	<p>Richard G. Reinis (2022)</p> <p>email: rreinis@thompsoncoburn.com</p> <p>(State Bar appointee)</p>
<p>Kim Savage (2022)</p> <p>email: kim@kimsavagelaw.com</p> <p>(State Bar appointee)</p>	<p>Christian Schreiber (2023)</p> <p>email: christian@osclgal.com</p> <p>(State Bar appointee)</p>
<p>Christina S. Vanarelli (2022)</p> <p>email: Christina@YourVenturaCountyLawyer.com</p> <p>(State Bar appointee)</p>	
<p><u>ADVISOR</u></p> <p>Hon. Lisa R. Jaskol (2022)</p> <p>email: LJaskol@lacourt.org</p> <p>(Judicial Council appointee)</p>	<p><u>ADVISOR</u></p> <p>Hon. William J. Murray, Jr. (2023)</p> <p>email: william.murray@jud.ca.gov</p> <p>(Judicial Council appointee)</p>
<p><u>ADVISOR</u></p> <p>Hon. Brad Seligman (2021)</p> <p>email: bseligman@alameda.courts.ca.gov</p> <p>(Judicial Council appointee)</p>	

CALIFORNIA LEGISLATURE— 2019–2020 REGULAR SESSION

ASSEMBLY BILL NO. 89

CHAPTER 7

An act to amend the Budget Act of 2020 by amending Items 0250-001-0001, 0250-101-0001, 0250-101-0932, [etc.] of, that act, relating to the state budget, and making an appropriation therefor, to take effect immediately, budget bill.

[Approved by Governor June 29, 2020. Filed with Secretary of State June 29, 2020.]

THE PEOPLE OF THE STATE OF CALIFORNIA DO ENACT AS FOLLOWS:

The Budget Act of 2020 made appropriations for the support of state government for the 2020–21 fiscal year.

This bill would amend the Budget Act of 2020 by amending items of appropriation and making other changes.

This bill would declare that it is to take effect immediately as a Budget Bill.

THE PEOPLE OF THE STATE OF CALIFORNIA DO ENACT AS FOLLOWS:

[....]

0250-101-0001—For local assistance, Judicial Branch 35,786,000

Schedule:

(1) 0150010-Support for Operation of Trial Courts..... 7,234,000

(2) 0150051-Child Support Commissioner Program (AB 1058) 54,332,000

(3) 0150055-California Collaborative and Drug Court Projects 5,748,000

(4) 0150075-Grants—Other 8,586,000

(5) 0150083-Equal Access Fund 20,392,000

(6) Reimbursements to 0150051-Child Support Commissioner Program (AB 1058) –54,332,000

(7) Reimbursements to 0150055-California Collaborative and Drug Court Projects –4,588,000

(8) Reimbursements to 0150075-Grants—Other –1,586,000

Provisions:

1. In order to improve equal access and the fair administration of justice, the funds appropriated in Schedule (5) are to be distributed by the Judicial Council through the Legal Services Trust Fund Commission to qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used for legal services in civil matters for indigent persons. The Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. Ten percent of the funds in Schedule (5) shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and 90 percent of the funds in Schedule (5) shall be distributed consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. The Judicial Council may establish additional reporting or quality control requirements consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code.

[....]

0250-101-0932—For local assistance, Judicial Branch, payable from the Trial Court Trust Fund 2,620,207,000

Schedule:

(1) 0150010-Support for Operation of Trial Courts 2,030,956,000
 (2) 0150019-Compensation of Superior Court Judges 395,802,000
 (3) 0150028-Assigned Judges 29,812,000
 (4) 0150037-Court Interpreters 131,380,000
 (5) 0150067-Court Appointed Special Advocate (CASA) program 2,713,000
 (6) 0150071-Model Self-Help Program 957,000
 (7) 0150083-Equal Access Fund 5,482,000
 (8) 0150087-Family Law Information Centers 345,000
 (9) 0150091-Civil Case Coordination 832,000
 (10) 0150095-Expenses on Behalf of the Trial Courts 21,929,000
 (11) Reimbursements to 0150010-Support for Operation of Trial Courts –1,000

Provisions:

[....]

8. In order to improve equal access and the fair administration of justice, the funds appropriated in Schedule (7) are available for distribution by the Judicial Council through the Legal Services Trust Fund Commission in support of the Equal Access Fund Program to qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used for legal services in civil matters for indigent persons. The Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. Upon approval by the Administrative Director, the Controller shall transfer up to 5 percent of the funding appropriated in Schedule (7) to Item 0250-001-0932 for administrative expenses. Ten percent of the funds remaining after administrative costs shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and 90 percent of the funds remaining after administrative costs shall be distributed, consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. The Judicial Council may establish additional reporting or quality control requirements, consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code.

9. Funds available for expenditure in Schedule (7) may be augmented by order of the Director of Finance by the amount of any additional resources deposited for distribution to the Equal Access Fund Program in accordance with Sections 68085.3 and 68085.4 of the Government Code. Any augmentation under this provision shall be authorized not sooner than 30 days after notification in writing to the chairpersons of the committees in each house of the Legislature that consider appropriations, the chairpersons of the committees and appropriate subcommittees that consider the State Budget, and the Chairperson of the Joint Legislative Budget Committee, or not sooner than whatever lesser time the chairperson of the joint committee, or the chairperson's designee, may determine.

[....]

Source: https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201920200AB89#:~:text=The%20Budget%20Act%20of%202020%20made%20appropriations%20for%20the%20support,immediately%20as%20a%20Budget%20Bill.

#	Organization	2021 EAF Grant Allocation
1	Advancing Justice - Asian Law Caucus	\$203,020.00
2	Affordable Housing Advocates	\$7,870.00
3	Aids Legal Referral Panel	\$21,400.00
4	Alameda County Homeless Action Center	\$91,080.00
5	Alliance for Children's Rights	\$314,050.00
6	Asian Americans Advancing Justice- - Los Angeles	\$473,350.00
7	Asian Pacific Islander Legal Outreach	\$61,230.00
8	Bay Area Legal Aid	\$322,260.00
9	Bet Tzedek Legal Services	\$619,620.00
10	California Advocates for Nursing Home Reform	\$143,149.00
11	California Indian Legal Services	\$163,562.00
12	California Rural Legal Assistance Foundation	\$143,149.00
13	California Rural Legal Assistance, Inc.	\$1,471,398.00
14	California Women's Law Center	\$143,149.00
15	Casa Cornelia Law Center	\$205,250.00
16	Center for Gender and Refugee Studies - California	\$143,149.00
17	Center for Human Rights and Constitutional Law	\$143,149.00
18	Central California Legal Services	\$846,420.00
19	Centro Legal de la Raza	\$174,590.00
20	Chapman University Family Protection Clinic	\$19,510.00
21	Child Care Law Center	\$143,149.00
22	Coalition of California Welfare Rights Organizations	\$143,149.00
23	Community Legal Aid SoCal	\$526,050.00
24	Community Legal Services in East Palo Alto	\$134,570.00
25	Contra Costa Senior Legal Services	\$20,580.00
26	Dependency Advocacy Center	\$58,750.00
27	Disability Rights California	\$2,037,673.00
28	Disability Rights Education and Defense Fund	\$143,149.00
29	Disability Rights Legal Center	\$173,891.00
30	East Bay Community Law Center	\$105,850.00
31	Elder Law & Advocacy	\$105,290.00
32	Eviction Defense Collaborative	\$22,870.00
33	Family Legal Assistance at CHOC Children's*	\$13,778.00
34	Family Violence Appellate Project	\$143,149.00
35	Family Violence Law Center	\$15,280.00
36	Greater Bakersfield Legal Assistance	\$342,960.00
37	Harriett Buhai Center for Family Law	\$130,200.00
38	HEART L.A.	\$5,440.00
39	Housing and Economic Rights Advocates	\$39,354.00
40	Immigrant Legal Resource Center	\$143,149.00
41	Impact Fund	\$143,149.00
42	Inland Counties Legal Services	\$1,166,430.00
43	Inland Empire Latino Lawyers Association, Inc.	\$179,508.00

* Pending receipt of final audit. Granted extension until August 31.

#	Organization	2021 EAF Grant Allocation
44	Inner City Law Center	\$424,540.00
45	Justice & Diversity Center of the Bar Association of San Francisco	\$92,400.00
46	Justice in Aging	\$143,149.00
47	La Raza Centro Legal	\$29,170.00
48	LACBA Counsel for Justice	\$57,300.00
49	Law Foundation of Silicon Valley	\$193,660.00
50	Lawyers' Committee for Civil Rights	\$184,310.00
51	Learning Rights Law Center	\$102,100.00
52	Legal Access Alameda	\$36,390.00
53	Legal Aid at Work	\$308,473.00
54	Legal Aid Foundation of Los Angeles	\$803,940.00
55	Legal Aid Foundation of Santa Barbara County	\$67,840.00
56	Legal Aid of Marin	\$37,740.00
57	Legal Aid of Sonoma County	\$97,600.00
58	Legal Aid Society of San Bernardino	\$151,730.00
59	Legal Aid Society of San Diego	\$559,520.00
60	Legal Aid Society of San Mateo County	\$56,210.00
61	Legal Assistance for Seniors	\$18,070.00
62	Legal Assistance to the Elderly	\$13,650.00
63	Legal Services for Children	\$35,910.00
64	Legal Services for Prisoners with Children	\$143,149.00
65	Legal Services for Seniors	\$74,570.00
66	Legal Services of Northern California	\$846,000.00
67	Los Angeles Center for Law and Justice	\$85,060.00
68	McGeorge Community Legal Services	\$83,140.00
69	Mental Health Advocacy Services	\$47,470.00
70	National Center for Youth Law	\$143,149.00
71	National Health Law Program	\$143,149.00
72	National Housing Law Project	\$143,149.00
73	National Immigration Law Center	\$143,149.00
74	Neighborhood Legal Services*	\$649,210.00
75	OneJustice	\$143,149.00
76	Prison Law Office	\$315,223.00
77	Public Advocates Inc.	\$230,794.00
78	Public Counsel	\$842,070.00
79	Public Interest Law Project	\$143,149.00
80	Public Law Center	\$459,480.00
81	Riverside Legal Aid	\$136,279.00
82	San Diego Volunteer Lawyer Program	\$174,140.00
83	San Joaquin College of Law	\$40,840.00
84	San Luis Obispo Legal Assistance Foundation	\$22,060.00
85	Santa Clara County Asian Law Alliance	\$50,620.00
86	Santa Clara University Alexander Law Center	\$20,980.00

* Pending receipt of final audit. Granted extension until August 31.

#	Organization	2021 EAF Grant Allocation
87	Senior Adults Legal Assistance	\$16,360.00
88	Senior Advocacy Network	\$34,390.00
89	Senior Citizens Legal Services	\$15,180.00
90	Social Justice Collaborative	\$38,410.00
91	UC Davis School of Law Legal Clinics	\$95,870.00
92	UnCommon Law	\$77,350.00
93	USD School of Law Legal Clinics	\$87,020.00
94	Veterans Legal Institute	\$56,570.00
95	Voluntary Legal Services Program of Northern California	\$97,930.00
96	Wage Justice Center	\$25,410.00
97	Watsonville Law Center	\$43,780.00
98	Western Center on Law and Poverty	\$143,149.00
99	Worksafe, Inc.	\$143,149.00
100	Youth Law Center	\$143,149.00
101	Yuba-Sutter Legal Center for Seniors	\$10,200.00
	Total	\$21,169,321.00

* Pending receipt of final audit. Granted extension until August 31.



Eligibility Category: LSP

Grant Year: 2021

Due Date: March 16, 2020 5:00pm PST

Prepared by: Catherine Borgeson

Email: Catherine.Borgeson@calbar.ca.gov

Contact Phone: 415-538-2021

Funding Opportunity: Partnership Grants

Project Title: Test PG 2021

Program Name: Test BriCo Legal Services234

Applicant Title: Senior Program Analyst

Address: 180 Howard Street 5th Floor

City: SanFrancisco

I verify the information in the Organization Profile is accurate and up to date.

I verify that I have read, and am familiar with, the eligibility requirements and funding criteria for Partnership Grants.

Form A - Project Profile

1. Application Contact: contact

Job Title: test

Email: test@gmail.com

Telephone: 4153453444

County(ies) Served by this Project

Butte

3. Total Amount \$40,000

Requested:

Request project amounts
divisible evenly by 1,000.



County	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
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5. Is the project currently in operation, regardless whether funded by a Partnership Grant?

An existing project would be considered "new" or not currently funded, if the proposal indicates a change to the location of the host court, or a significantly change to its substantive focus.

Yes

5.a. Current Project Summary

Provide a brief summary of services provided to date in the current year, with any relevant highlights, benchmarks, challenges, etc. What changes have been made to the project over the past year, and what changes are anticipated over the year for which funding is sought? (250 word limit)

test

5.b. Is the project currently funded by a Partnership Grant?

Yes

Select Project for 2020 - Test
Refunding:

Number of years this 2
project has been
currently funded by a
Partnership Grant:

6. Project Abstract: Describe the core aspects of your proposed grant project, including the legal area to be addressed; the target constituency; the type(s) of services to be provided; the location and hours of operation for this project; project staffing; general nature of court participation; and main goals.

This abstract will be submitted in summaries provided to the Legal Services Trust Fund Commission and the Judicial Council, as well as it is pulled into the Letter of Support template on Form F of this application. (250 word limit)

test test test test

7. Substantive Area(s)



Health and Long-term Care, Income Maintenance, Other

7.a. Explain "Other":

Form B - Project Description

1. Program's Qualifications: What is the applicant program's experience providing assistance to self-represented litigants, including court-based services? (250 word limit)

test

2. Needs Assessment: Describe the demographics of the target community, the geographic area to be served by the project, and why the target population is in particular need of the services to be provided. (250 word limit)

test

3. Types of Services to be Provided: Describe the legal issues to be addressed and the type and level of services to be offered by the project. (250 word limit)

test

Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
-------------------------------	---------------------	--------------------------------------------------------

4.a. Describe the format for any workshops, including any use of video conference or electronic document assembly, and the goal for each type of workshop. (250 word limit)

4.b. Identify any new resource materials to be developed, who will be responsible for preparing those materials, and how they differ from materials already posted, i.e., at www.courts.ca.gov. (250 word limit)

4.c. Other

Identify any further or additional project goals, not identified above. (250 word limit)



5. Community Engagement

5.a. Outreach: Describe how you will communicate the availability of services to litigants and the community. (250 word limit)

test

5.b. Language Access: Describe language capabilities among staff, including resources for translation services if necessary for serving the target population. (250 word limit)

test

5.c. Describe current and planned coordination and collaboration on this project with existing court-based services, other legal services providers, or other community organizations. (250 word limit)

fine.

6. Quality Control

6.a. Staffing Structure: Identify key personnel involved in staffing and supervising this project. If supervision is not being provided on-site, describe the steps that will be taken to ensure quality control. (250 word limit)

test

6.b. Supervision of Volunteers: Identify any volunteers to be utilized, their anticipated role, and how they will be trained and supervised. (250 word limit)

test

6.c. Pro Se Document Review: How will the project ensure that documents are completed correctly? Who will conduct the review and when? (250 word limit)

test

6.d. Sub-Grants: Provide details for any sub-grant(s), including plans for oversight and evaluation of the services provided by the sub-grantee. (250 word limit)



test

7. Eligibility for Services

7.a. Identify all criteria and guidelines used to establish eligibility for services and how the project screens for eligibility for services. (250 word limit)

test

7.b. Identify any resources or referrals to be provided to litigants who are not eligible for this project's services. (250 word limit)

This response will be included in the Letter of Support template on Form F of this application.

tester

7.c. Partnership Grants may only be used for services provided to indigent individuals, as defined at Business & Professions Code Section 6213(d). How will the organization ensure Partnership Grant funds will only be used to provide services to indigent individuals? (250 word limit)

8. Attorney-Client Relationship: Will this project establish an attorney-client relationship?

Yes

8.a. Describe how project staff will check for client conflicts, and how individuals will be served if a conflict is identified, i.e., referrals to a conflict panel, independent contractor, etc. (250 word limit)

This response will be included in the Letter of Support template on Form F of this application.

test 123

8.a. Explain how litigants will be made aware of the scope of services to be provided and that no attorney-client relationship will be established. (250 word limit)

This response will be included in the Letter of Support template on Form F of this application.



9. Impartiality of the Court: Will this project serve only one party or side of a matter?

Yes

9.a. Identify which side will be served, and why the project has established this limitation? What are the social implications of this decision? How will this project address any risk to the appearance of the court's impartiality as a result of limiting services to one side of these matters? (250 word limit)

This response will be included in the Letter of Support template on Form F of this application.

10. Partnership with the Host Court

(A formal letter of support and memorandum of understanding must be uploaded to Form F; see the instructions for detailed information about these documents.)

10.a. Facilities; Access; In-Kind Support: Identify all space and material resources being provided by the court, and any special access to facilities or data to be provided to the project or its staff. (250 word limit)

test

10.b. Regular Meetings: Project staff should meet no less than quarterly with key court partners, with a formal agenda. Identify the schedule for these meetings, who is expected to participated, and any issues currently to be resolved. (250 word limit)

test

10.c. Evaluation Support: The court is considered to be an equal partner in ensuring that the funded services are meaningfully evaluated. Identify the court's role in evaluating this project. (250 word limit)

test

10.d. Additional Components of the Court's Partnership: If there are any aspects of the court's partnership that have not been identified above. (250 word limit)



11. New Project Implementation Timetable: For projects that are not currently in operation, or that propose significant changes to existing operations, describe the proposed timetable for implementation of the project or revisions by quarter for the grant year. (250 word limit)

12. Evaluation

Projects must submit detailed reporting and evaluation materials after each grant year. These will include an expenditures report, information on the demographics of clinic customers, findings from client satisfaction surveys, a report on meetings with court partners, and at least one additional evaluation modality.

Upload a copy of the Satisfaction Survey now in use, or a proposed survey to be implemented in the coming grant year:

Sample_PDF_for_Testing.pdf

2.8 KB - 02/05/2020 5:10pm

Total Files: 1

12.a. Describe how the survey will be distributed, and how data will be gathered and analyzed. (250 word limit)

test

12.b. Identify at least one additional evaluation methodology to be used in assessing the impact or efficacy of this project's services. (250 word limit)

test

13. Project Continuity

Partnership Grant policy prioritizes funding for new and rural projects; funding is typically terminated after no more than five consecutive years.

13.a. Describe plans to obtain funding that will sustain this project's services beyond the typical Partnership Grant funding cycle. (250 word limit)

test



13.b. List all funding sources that have been explored or pursued for this Partnership Grant project in the last twelve months. Specifically identify applications submitted, amounts requested, revenue raised for project operations, and any funds that were obtained by leveraging the Partnership Grant. This section may also be used to explain any barriers to pursuing funds. (250 word limit)

test

Form C - Project Budget

Program Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
1. Lawyers	\$1	\$0	\$0	\$1
2. Paralegals	\$0	\$0	\$0	\$0
3. Other Staff	\$0	\$0	\$0	\$0
SUBTOTAL	\$1	\$0	\$0	\$1
4. Employee Benefits	\$0	\$0	\$0	\$0
TOTAL PROGRAM PERSONNEL	\$1	\$0	\$0	\$1

Program Non-Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
5. Space	\$0	\$0	\$0	\$0
6. Equipment Rental and Maintenance	\$0	\$0	\$0	\$0
7. Office Supplies	\$0	\$0	\$0	\$0
8. Printing and Postage	\$0	\$0	\$0	\$0
9. Telecommunications	\$0	\$0	\$0	\$0
10. Technology	\$0	\$0	\$0	\$0
11. Program Travel	\$0	\$0	\$0	\$0
12. Training	\$0	\$0	\$0	\$0
13. Library	\$0	\$0	\$0	\$0
14. Insurance	\$0	\$0	\$0	\$0



15. Evaluation	\$0	\$0	\$1	\$1
16. Contract Service to Clients	\$0	\$0	\$0	\$0
17. Other	\$0	\$1	\$0	\$1
TOTAL PROGRAM NON-PERSONNEL	\$0	\$1	\$1	\$2
TOTAL PROGRAM	\$1	\$1	\$1	\$3
Administrative and Overhead				
18. Admin Personnel	\$39,998	\$0	\$0	\$39,998
19. Admin Non-Personnel	\$4	\$0	\$0	\$4
TOTAL ADMINISTRATIVE	\$40,002	\$0	\$0	\$40,002
TOTAL AMOUNT OF FUNDS	\$40,003	\$1	\$1	\$40,005

1. Lawyers

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
test	1.00	1.00	3.00	5.00
test	1.00	3.00	2.00	6.00
test	3.00	3.00	3.00	9.00
TOTAL LAWYERS	5.00	7.00	8.00	20.00

2. Paralegals

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
TOTAL PARALEGALS	0.00	0.00	0.00	0.00

3. Other Staff

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00



The State Bar of California

04/29/2020

TOTAL OTHER STAFF	0.00	0.00	0.00	0.00
TOTAL PERSONNEL (in FTEs)	5.00	7.00	8.00	20.00

Form D - Budget Narrative



Personnel

Account Title	Proposed Partnership Grant	Narrative
1. Lawyers	1	test
2. Paralegals	0	test
3. Other Staff	0	
SUBTOTAL	1	
4. Employee Benefits	0	
TOTAL PERSONNEL	1	

Non-Personnel

Account Title	Proposed Partnership Grant	Narrative
5. Space	0	
6. Equipment Rental and Maintenance	0	test
7. Office Supplies	0	
8. Printing and Postage	0	
9. Telecommunications	0	
10. Technology	0	
11. Program Travel	0	
12. Training	0	
13. Library	0	
14. Insurance	0	
15. Evaluation	0	
16. Contract Service to Clients	0	
17. Other	0	
TOTAL NON-PERSONNEL	0	
Administrative		
18. Personnel	39998	test
19. Non-Personnel	4	
TOTAL ADMINISTRATIVE	40002	
TOTAL AMOUNT OF FUNDS	40003	

Form E - Project Assurances



Please download the Assurances document and upload a signed copy below. Please upload PDF files only.

**Upload Signed
Assurances Document:**

Sample_PDF_for_Testing.pdf

2.8 KB - 02/05/2020 3:59pm

Total Files: 1

Form F - Agreement of the Partner Court

Any uploaded Letter(s) of Support and MOU are listed below and also attached at the end of this pdf.

**1. Upload Letter(s) of
Support:**

Sample_PDF_for_Testing.pdf

2.8 KB - 02/05/2020 3:59pm

Total Files: 1

2. Upload MOU(s):

Refer to application
instructions for MOU
requirements.

Supporting Documents (Optional)

When naming optional supporting documents, please include the Organization's acronym (or short name) and a 1-5 word description of the file.



Staff Review

Project Budget: No Revision Required

**All Services at
Courthouse:**

**Application Review No
Complete:**

Sample PDF for Testing

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	DESCRIPTION	PROPOSED ALLOCATION
Bet Tzedek Legal Services	Self-Help Elder and Dependent Adult Restraining Order Clinic	Los Angeles (Mosk)	Core components of this clinic include: (1) partnering with UCLA Law School to offer clinical placement at the Clinic; (2) collaborating with the court on Guide and File; (3) working with APS social workers to file on behalf of incapacitated victims; (4) exploring remote service options; and (5) assisting pro per litigants.	\$78,491
Central California Legal Services	Guardianship Project	Fresno	The Guardianship Project helps low-income self-represented litigants in Fresno County obtain guardianships for minor children, in conjunction with the Fresno Superior Court Probate Division and Fresno County Public Law Library. Litigants receive detailed guidance in completing required forms, and clinic staff review completed forms for accuracy and thoroughness.	\$58,868
Central California Legal Services	Tenant/Landlord Housing Law Project	Fresno	This project provides individualized assistance from project staff and volunteers to both self-represented tenants and landlords, in completing Judicial Council forms. Litigants receive information on tenant/landlord rights and responsibilities; the UD process; and how to prepare for court.	\$68,680

Central California Legal Services	Unlawful Detainer Workshop	Tulare	A CCLS attorney will offer trial preparation workshops to litigants who have a scheduled court hearing. The Project will deliver classes in Visalia and Porterville, training litigants how to successfully present their cases, and how to make best use of the Court's mediation process. This proposed project builds on existing services by helping self-represented litigants prepare for trial.	\$68,680
Community Legal Aid SoCal	Community Court Clinic	Orange (Santa Ana)	Community Legal Aid SoCal has proposed presenting two clinics per month in coordination with the Pro Bono Committee of the Orange County Bar Association, with one-on-one consultations to help self-represented litigants identify and respond to civil legal issues having negative impacts on their lives with 1) a legal "checkup" and screening process; 2) an informational clinic for self-represented litigants; and 3) referral if needed.	\$34,340
Community Legal Aid SoCal	Consumer Debt Workshop	Orange (Santa Ana)	This project conducts a Consumer Debt Workshop at the Central Justice Center in Santa Ana, designed to assist pro per litigants whether at the earliest stage of a debt collection matter to or after having been served with a collection lawsuit, to educate, inform, and assist self-represented litigants so that the debt collection legal process is accessible and comprehensible.	\$22,566
Community Legal Aid SoCal	Unlawful Detainer Workshop	Los Angeles (Norwalk)	This project conducts a Consumer Debt Workshop at the Norwalk Courthouse, to assist self-represented litigants with information about debt collection practices, including those who have been sued in court on debt collection issues or who have had a debt collection judgment entered against them, to make the debt collection legal process more accessible and comprehensible.	\$68,680

Elder Law & Advocacy	Unlawful Detainer Clinic	Imperial	The Imperial County Unlawful Detainer Clinic (ICUD) will continue to provide information and assistance to qualifying self-represented litigants in unlawful detainer matters from the El Centro Superior Court, with both direct assistance and weekly workshops on unlawful detainer cases.	\$69,661
Family Violence Law Center	Domestic Violence Pro Per Project	Alameda (Hayward)	The Domestic Violence Pro Per (DVPP) Project is a collaborative project of Family Violence Law Center (FVLC), Legal Access Alameda (LAA), and the Self-Help Center of the Superior Court of California, County of Alameda (SHC), providing legal assistance to pro per domestic violence litigants at weekly Domestic Violence Petitioner Clinic for DVPA petitioners at the Hayward Hall of Justice and an existing LAA family law clinic.	\$24,528
Housing and Economic Rights Advocates	Probate Clinic	San Mateo (Redwood City, South San Francisco)	This project will provide in pro per services for pro se litigants in the Probate Division, to facilitate the flow of cases through the court and ease the process for pro se litigants and the court by advising the public on the legal process itself, types of forms to be used and how to complete them, and steps to take in responding to court requests.	\$41,208
Inland Counties Legal Services	Consumer Rights Clinic	San Bernardino	This proposal for new services would place an attorney and paralegal at the courthouse three days a week to assist defendants in commercial litigation, including assistance with pleadings, discovery, case preparation, court hearings, and post-hearing steps.	\$92,227

Justice & Diversity Center of the Bar Association of San Francisco	FLASH-CARE	San Francisco	This project provides legal assistance to indigent Self-Represented Litigants with continued legal assistance at two court calendars, to move inactive family law cases toward timely disposition and to assist SRLs with preparation for trial and Mandatory Settlement Conferences. The project includes a volunteer component, as well as bi-lingual (Spanish/English) services.	\$39,246
Justice & Diversity Center of the Bar Association of San Francisco	SASH Self-Help	San Francisco	This project provides legal information, legal representation, and social services to litigants involved in custody disputes. Information and assistance is provided in English and Spanish to low-income SRLs filing paperwork for child custody and visitation matters, as well as facilitates settlement efforts.	\$72,604
LACBA Counsel for Justice	Domestic Violence Legal Services Project	Los Angeles (Mosk)	This project uses volunteers and technology to handle increasing numbers of DV-TRO requests, with new computer stations for litigants and full-time paralegal assistance. Pro per litigants will watch an educational video, and project staff and volunteer attorneys will be available to assist and answer questions.	\$89,284
Legal Access Alameda	Family Law Day of Court Program	Alameda (Hayward)	This project supports litigants on the self-represented litigant Request For Order calendars at the Hayward Hall of Justice. Volunteer attorneys, under staff supervision, take referrals from the bench to prepare Findings and Orders After Hearing.	\$29,434
Legal Access Alameda	Family Law Status Conference Project	Alameda (Hayward)	This project will support self-represented litigants appearing at Family Law Status Conference calendars, using Self-Help Center staff, VLSC staff, and volunteers to help self-represented litigants understand the dissolution process and to complete necessary forms.	\$63,774

Legal Aid Foundation of Los Angeles	Torrance Self-Help Center	Los Angeles (Torrance)	LAFLA's Self-Help Legal Access Center at the Torrance Courthouse will provide over 10,000 self-represented litigants with forms completion and legal information assistance in marriage dissolution & paternity cases from petition to judgment, as well as domestic violence, civil harassment and elder abuse restraining orders. Litigants are assisted both through workshops and on an individual basis.	\$88,302
Legal Aid Foundation of Santa Barbara County	Legal Resource Center Partnership	Santa Barbara (Lompoc, Santa Barbara)	Under this proposal, the Legal Aid Foundation of Santa Barbara County will hire a full-time, bilingual, self-help attorney to provide services to self-represented litigants at the Legal Resource Centers at both the Lompoc and Santa Barbara Superior Court.	\$114,793
Legal Aid of Marin	Remote Mandatory Settlement Conferences for Homelessness Prevention	Marin	This project will enable Marin Superior Court to continue to provide unlawful detainer litigants the opportunity to meet, negotiate, and resolve cases through an online platform. LAM staff and volunteers will meet with unrepresented parties in each case to resolves cases, including drafting settlement agreements, signed by both parties, to present to the court.	\$78,491
Legal Aid Society of San Bernardino	Caregivers Accessing Justice	San Bernardino	This project will assist Pro Se litigants on Probate Guardianship and Conservatorship cases through a supportive clinic offered six hours per day, four days per week, within the San Bernardino Justice Center. Services will be available in English and Spanish.	\$98,114
Legal Aid Society of San Diego	Name Change & Gender Change Self-Help Clinic	San Diego (Hall of Justice)	This project helps indigent, self-represented litigants in need of a name and/or gender change with facilitator-like one-on-one assistance including document preparation and information on the court process.	\$83,397

Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion Project	San Diego (Hall of Justice)	This project serves indigent, self-represented Unlawful Detainer litigants with daily, walk-in, emergency one-on-one assistance to both plaintiffs and defendants.	\$78,491
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	Alameda (Berkeley, Hayward, Wiley Manuel)	This project will provide legal assistance to low income, pro per litigants in all aspects of guardianship cases including temporary petitions, general petitions, objections, adding or removing co-guardians, petitions for visitation and petitions for termination, with weekly workshops to assist with the filing requirements, and day of court assistance twice a month when the pro per cases are calendared.	\$63,774
Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	Alameda (Berkeley, Hayward, Wiley Manuel)	This project assists low income self-represented litigants prepare and pursue limited conservatorships, including procedural requirements for both temporary and general petitions, and developing new sample documents and instructions to assist with local rules and procedures.	\$63,774
Legal Services of Northern California	Mother Lode Pro Per Project	Amador, Calaveras, El Dorado, Nevada, Placer, Sierra	The Mother Lode Pro Per Project (MLPPP) serves a rural area where isolation and lack of alternate resources amplify the need for these services. An attorney and a paralegal ride a six-county circuit to assist in all areas of civil law, including document preparation, court filings, and small claims. Consumers are seen without appointments at weekly legal clinics throughout the counties.	\$93,208
Legal Services of Northern California	Small Claims and Guardianship Self-Help Project	Yolo	This project provides assistance to low-income persons in small claims and guardianship cases, including forms assistance and guidance.	\$60,831
Neighborhood Legal Services	Consumer Technology Project	Los Angeles (Chatsworth)	A new component has been proposed for this longstanding project, to assist defendants in commercial litigation with forms, discovery, and case strategy and preparation.	\$88,302

Neighborhood Legal Services	Housing Cases Continuum of Services	Los Angeles (Pasadena)	This longstanding project is proposed for funding to expand services for unlawful detainer litigants beyond housing issues to other frequently-related issues such as domestic violence or family law.	\$79,472
Neighborhood Legal Services	Stabilizing Families	Los Angeles (Antelope Valley, Van Nuys)	This is a proposal for new services to be provided at two branch courthouses that expand access to guardianship services beyond the central downtown area, into a suburban and a frontier community. Assistance will include support with initial filings and guidance regarding probate notes.	\$98,114
Public Counsel	Guardianship Clinic	Los Angeles (Mosk)	This clinic provides brief counsel, advice, and referrals to pro per litigants seeking guardianships or other actions in the probate court, with information probate issues, subject matter screening, needs assessments, review of pleadings, advice on appearing in court; and assistance in completing forms.	\$29,434
Public Law Center	De Facto & Adoptive Parent Assistance Project	Orange (Lamoreaux)	This project will support de facto parents in Juvenile Court proceedings potentially leading to adoptions, so de facto parents have the information they need at Dependency Court termination of parental rights proceedings, including by helping them find pro bono counsel if needed.	\$49,057
Public Law Center	Courthouse Guardianship Clinic	Orange (Santa Ana)	This clinic helps pro pers with guardianship proceedings through pro bono attorneys, focusing on emerging and critical needs of undocumented persons with minor U.S. citizen or LPR children, by providing legal information and forms assistance, and "Know Your Rights" presentations and materials for community leaders and members.	\$39,246

Riverside Legal Aid	Small Estate Assistance Program	Riverside	These clinics assist unrepresented, low-income litigants with probate administration and summary proceedings and answer general questions relating to decedents' estates, including assistance with pleadings and forms, procedural and legal information on family allowances, probate homestead, and family set aside proceedings, as well as monthly probate accounting workshops.	\$98,114
San Diego Volunteer Lawyer Program	Restraining Order Clinic	San Diego (Central)	This project assists domestic violence and elder abuse survivors with obtaining legal protection and referrals for counseling, shelter, support, and ongoing legal services as appropriate. SDVLP staff and volunteers provide legal advice and forms completion assistance.	\$98,114
San Luis Obispo Legal Aid Foundation	Rental Clinic	San Luis Obispo	This clinic will provide legal information on landlords' and tenants' rights and responsibilities as well as the eviction process and the return of security deposits. Clinic staff will help participants with completing forms and electronic filing, proofs of service and fee waivers. Additional information packets will be available in English and Spanish.	\$98,114
Total:				\$ 2,423,413

Program Name and Number: «ProgramNumber»

GRANT AGREEMENT**THE STATE BAR OF CALIFORNIA****OFFICE OF ACCESS & INCLUSION – EQUAL ACCESS FUND
IOLTA FORMULA GRANT**

This Grant Agreement (“Agreement”) is made as of January 1, «GrantYear», (“Effective Date”) between The State Bar of California, a California public corporation, with a principal place of business at 180 Howard Street, San Francisco, CA 94105 (“State Bar”), and «ProgramLegalName», a California nonprofit corporation, with a principal place of business at «ProgramPPBaddress» (“Recipient”). This Agreement sets forth the terms and conditions for receiving the Grant. State Bar and Recipient are sometimes hereinafter referred to individually as a “Party,” and together as the “Parties”.

RECITALS

- A. Pursuant to California Business and Professions Code Section 6210-6228 (“Act”), and Title 3, Division 5, Chapter 2 of the Rules of the State Bar of California (“Rules”), a Legal Services Trust Fund Program (“Program”) has been established in the State of California. The Office of Access & Inclusion administers the Program. The Program includes an Equal Access Fund (“Fund”) that is funded pursuant to the annual California Budget Act (“Budget Act”) and the Uniform Civil Fees and Standard Fee Schedule Act of 2005 (“Fee Schedule Act”).
- B. Recipient has completed, executed, and submitted to the State Bar an application for funding under the Program and Fund. As part of the application for funding, Recipient has completed, executed, and submitted to the State Bar, Certifications, Assurances, Attachments, and a Proposed Budget (“Application Materials”).
- C. In reliance upon the representations and agreements made in the Application Materials, the State Bar has determined that Recipient is eligible for an IOLTA-Formula Equal Access Fund grant (“Grant”) under the Program and the Fund.
- D. NOW, THEREFORE, in consideration of covenants and agreements herein, and for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereto, intending to be legally bound hereby, agree as follows

AGREEMENTS

1. Pursuant to the Act, Rules, and Fund, and in reliance upon the promises and representations made by Recipient, the State Bar grants to Recipient «FinalEAFGrantAllocation» (“Grant Amount”).
2. The grant period will commence on January 1, «GrantYear» (“Start Date”) and end on December 31, «GrantYear» (“End Date, collectively with the Start Date, the “Grant Period”).
3. The Act, Budget Act, Fee Schedule Act, Rules, Legal Services Trust Fund Program General Grant Provisions (“Grant Provisions”), Legal Services Trust Fund Program

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Eligibility Guidelines (“Eligibility Guidelines”), and Application Materials, including any additions or amendments made to the Application Materials by an agreement between the State Bar and Recipient, are incorporated into this Agreement as if set forth in their entirety in this Agreement. Recipient agrees to comply with the Act, Budget Act, Fee Schedule Act, Rules, Grant Provisions, Eligibility Guidelines, Assurances, and other agreements made in the Application Materials. Recipient agrees to comply with all lawful statutes, rules, regulations, guidelines, policies, instructions, and similar directives pertaining to the Program and the Fund (collectively, “Directives”) issued by the State of California, the Supreme Court of the State of California or the State Bar, including without limitation, any Directive adopted after the Effective Date.

4. Recipient represents and warrants that its governing board, the officers, and similarly empowered staff have read and understand the Act, Budget Act, Rules, Application Materials, Eligibility Guidelines, and Grant Provisions. Recipient has familiarized appropriate staff with the requirements of the Act, the Rules, the Grant Provisions, and the Application Materials.
5. Recipient acknowledges that the terms of this Grant, including Grant Provision Article 4.05, Regulating Rule 3.680(E)(1), and Business and Professions Code Section 6222, require Recipient to submit to the State Bar an accurate and a complete financial statement that has been audited or reviewed by a certified public accountant as specified in the Schedule of Charges and Deadlines.
6. The State Bar will pay the Grant Amount in accordance with the Grant Provisions. However, under no circumstances will the State Bar bear any liability to Recipient or to other persons or entities for delays in payments.
7. Termination.
 - a) Notwithstanding the Grant Provisions or any other provision of this Agreement regarding the payment of the Grant, Recipient acknowledges that the Grant Amount and all payments thereof shall be made from funds received by the State Bar pursuant to the Budget Act and Fee Schedule Act (“State Funding”), and are contingent upon the availability and sufficiency of such funds, as determined by the State Bar in its sole discretion. Consequently, Recipient shall not be guaranteed any specific dollar amount in grant funds, or any grant funds at all, if funds received pursuant to State Funding are insufficient or unavailable to the State Bar. This Agreement shall terminate automatically if State Funding becomes unavailable. The State Bar will not assume any liability whatsoever to Recipient for any failure to pay the Grant Amount or any part thereof that results because funds are insufficient or unavailable.
 - b) The State Bar may terminate this Agreement pursuant to the process set forth in Rule 3.691.
 - c) The State Bar may terminate this Agreement, in its sole discretion, with or without cause and for any reason upon thirty (30) days’ written notice to Recipient.
 - d) The State Bar may terminate for cause, without prejudice to State Bar’s right to recover any Grant Amount previously paid, if Recipient fails to comply with the provisions of this Agreement. The termination shall be effective five (5) business

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days after the State Bar sends written notice of termination to Recipient pursuant to Section 19.

- e) This Agreement will terminate automatically in the event of the bankruptcy or insolvency of either Party.
- 8. This Agreement does not impose on the State Bar any obligation to provide Recipient funds in excess of the Grant Amount or beyond the end of the Grant Period.
- 9. Recipient shall spend the Grant Amount received in connection with the Program and Fund in each county and in the amounts set forth in Attachment A – Grant Allocation Detail, which is attached hereto and incorporated herein by reference.
- 10. Recipient represents and warrants that Recipient's Application Materials for the Grant under the Program and Fund does not misstate or omit any material fact. Recipient will notify the State Bar promptly (but in no event within three (3) business days) in writing of any change in any material fact affecting Recipient's eligibility to receive funds under the Program and Fund, including without limitation, any change that affects the accuracy of any statement made in conjunction with Recipient's application for the Grant under the Program and Fund. Recipient will also notify the State Bar promptly (but in no event within three (3) business days) in writing of any material change in the planned activities or proposed budget contained in the Application Materials or any revision thereto.
- 11. In support of the State Bar's obligation to the Judicial Council to ensure full participation by Program recipients in maintaining and using statewide on-line resources for legal advocates and consumers of legal services, Recipient will:
 - a) Ensure that, during the Grant Period, Recipient is accurately identified on the statewide legal services websites, including, as appropriate, in the:
 - i. Client referral directory on LawHelpCalifornia.org;
 - ii. Legal Services Directories (support center and field program directories); and
 - iii. *Pro Bono* Programs Guide on CaliforniaProBono.org;
 - b) Include information about LawHelpCalifornia.org and CALegalAdvocates.org in trainings for new staff advocates, circulate information received from state coordinators about these websites to appropriate staff members, encourage staff to join the CALegalAdvocate.org website, and must encourage participation in brief trainings about the websites as available; and
 - c) Provide a link to LawHelpCalifornia.org on its own program's website.
- 12. Recipient will permit the State Bar's personnel, independent contractors or agents ("Personnel") to inspect at any time any office or other premises maintained by Recipient or used by Recipient in connection with the expenditure of the Grant Amount received under the Program. Recipient will cooperate with the State Bar's Personnel during such inspections and will furnish to the Personnel any information that the Personnel reasonably request as relevant to determining Recipient's compliance with this Agreement. The State Bar's right of access to Recipient's records for purposes of compliance will survive the expiration of the Grant Period. In complying with disclosure requirements of this Agreement and of the Program and Fund, Recipient may withhold

Program Name and Number: «ProgramNumber»

any client-identifying information when Recipient reasonably determines that disclosure would violate the Act, the Rules, a rule of professional responsibility or any other laws.

13. The Act, Budget Act, Fee Schedule Act, Rules, Grant Provisions, Eligibility Guidelines, and Directives set forth requirements concerning the use of Program funds and payment for subcontracts to provide legal services ("Subcontracted Services"). Recipient acknowledges its obligation to inform all providers of Subcontracted Services of the requirements of the Program and to obtain from all Subcontracted Services providers a written agreement to comply with all requirements of this Agreement as if that provider is the Recipient. Recipient assigns to the State Bar all rights that Recipient has or shall acquire to inspect the premises and records of providers of Subcontracted Services to ensure compliance with Program; provided, however, that disclosure of client-identifying information by a provider of Subcontracted Services shall be governed by the provisions of Section 12 above.
14. Recipient shall not represent or in any way suggest that it may obligate or pledge the credit of the State of California or of the State Bar.
15. Except as otherwise required by law, Recipient shall own all rights, title and interest in any materials produced as a result of this Grant (the "Grant Work Product"). Recipient hereby grants to the State Bar a non-exclusive, transferable, perpetual, irrevocable, royalty-free, paid-up, worldwide right and license to use, re-use, display, perform, reproduce, publish, copy, modify, create derivative works and distribute, for non-commercial purposes, the Grant Work Product and any other work product arising out of or resulting from the Grant Amount, including all intellectual property rights appurtenant thereto, and to sublicense such rights to third parties. Without limiting the foregoing, such license includes the right of the State Bar to publish the Grant Work Product on the State Bar's website, and for use in periodic reports, press releases, meetings, and fact sheets. Recipient further acknowledges and agrees, at the State Bar's request, to execute any additional documents necessary to effect such license.
16. Recipient agrees to indemnify, defend, and hold harmless State Bar (including its Board of Trustees, officers, agents, and employees, as the same may be constituted now and from time to time hereafter) from and against any and all liabilities, losses, damages, expenses or costs, whatsoever (including reasonable attorneys' fees, costs, and expenses), which may arise against or be incurred by the State Bar as a result of or in connection with (i) claims by any and all contractors, subcontractors, providers of consulting services, materialmen, laborers, or any other person, firm, or corporation retained by Recipient to furnish or supply work, service, materials, or supplies in connection with the performance of this Agreement; (ii) claims by any person, firm, or corporation for loss, injury or damage by Recipient or Recipient's agents in connection with the provision of legal services pursuant to this Agreement; (iii) any acts or omissions of Recipient, or its officers, employees or agents, in applying for, accepting, expending or applying the Grant Amount or in performing activities or services in breach of this Agreement. Recipient shall be liable to the State Bar for all costs (including but not limited to reasonable attorneys' fees, costs and expenses) that may be incurred) arising from or in connection with the State Bar's enforcement of its rights under this Section 16. This indemnity provision shall survive the termination or expiration of this Agreement.

Program Name and Number: «ProgramNumber»

17. Recipient will maintain insurance coverage such as commercial general liability insurance, workers' compensation insurance and comprehensive automobile liability sufficient to cover its services, activities, risks, and potential omissions of the services in accordance with generally-accepted industry standards and as required by law. Recipient shall provide the State Bar offices at 180 Howard Street, San Francisco, CA 94105 Attn: Risk Management with these certificates of insurance within thirty (30) days of the Effective Date. Recipient will ensure subcontractors maintain insurance coverage consistent with this section
18. Any publicity related to the services provided using the Grant Amount during the Grant Period, but not limited to, notices, informational pamphlets, press releases, research, reports, signs, and similar public notices prepared by or for the Recipient or its employees individually or jointly with others, shall identify the State Bar and Judicial Council of California as the funding agency and shall not be released without prior written approval by the State Bar.
19. Any notices to be given by either Party to the other must be in writing, and both emailed and delivered personally or by first-class, certified, registered, or overnight mail addressed to the Parties at the addresses stated below:

State Bar: The State Bar of California
180 Howard Street
San Francisco, CA 94105

Attention: Doan Nguyen, Program Supervisor
Office of Access & Inclusion
doan.nguyen@calbar.ca.gov

Recipient: «ProgramLegalName»
«Address1» «Address2»
«City», «State» «ZipCode»
«Add primary contact email address»

Attention: «PrimaryContactName»
«PrimaryContactJobTitle»

Each Party may change the notice address appearing above by giving the other Party written notice in accordance with this Section. Such changes in address for purposes of giving notice will be effective two (2) weeks after giving notice of the change in address.

20. This Agreement, together with the Act, Budget Act, Fee Schedule Act, Application Materials, Rules, Grant Provisions, Assurances, Eligibility Guidelines, Directives, and Attachment A contains and constitutes the entire agreement between the State Bar and Recipient regarding the State Bar's Grant of Equal Access Fund monies to Recipient and supersedes all prior negotiations, representations, or agreements, either written or oral.
21. The Recipient shall neither assign nor transfer any rights or obligations under this Agreement without the prior written consent of the State Bar. This Agreement shall be binding upon agents and successors of both Parties.

Program Name and Number: «ProgramNumber»

22. No amendment, alteration or variation of the terms of this Agreement will be valid unless made in writing and signed by both of the Parties.
23. This Agreement was made and entered into by the Parties in the State of California and shall be construed according to the laws of the State of California. Any action or suit brought to interpret, construe, or enforce the provisions of this Agreement shall be commenced in the Superior Court of the State of California, in and for the County of San Francisco.
24. Each Party represents that it has full power and authority to enter into and perform this Agreement and the person signing this Agreement on behalf of each Party has been properly authorized and empowered to enter into this Agreement. Each Party further acknowledges that its Directors, Trustees, or similarly empowered persons have read this Agreement, understand it, and agree to be bound by it.
25. No term or provision herein shall be deemed waived and no breach excused unless such waiver or consent is in writing and signed by the Party claimed to have waived or consented. No consent or waiver by one Party to a breach of this Agreement by the other Party, whether expressed or implied, shall constitute consent to, waiver of, or excuse for any other, different, or subsequent breach. No amendment, consent, or waiver on behalf of the State Bar shall be binding upon the State Bar unless it is executed by the Executive Director of the State Bar or the Executive Director's designee.
26. Each provision of this Agreement shall be separately enforceable, and the invalidity or unenforceability of one provision shall not affect the validity or enforceability of any other provision.
27. This Agreement may be executed in any number of counterparts, each of which will be deemed to be an original, and all of which, together will constitute but one and the same instrument. Delivery of an executed counterpart of this Agreement by facsimile, email or any other reliable means will be effective for all purposes as delivery of a manually executed original counterpart. Either Party may maintain a copy of this Agreement in electronic form. The Parties further agree that a copy produced from the delivered counterpart or electronic form by any reliable means (for example, photocopy, facsimile, or printed image) will in all respects be considered an original.

[Signatures Follow]

Program Name and Number: «ProgramNumber»

By executing this Agreement below, the Parties agree to its terms and conditions. This Agreement has been executed and delivered by the duly authorized representatives of State Bar and Recipient as of the date first written above.

THE STATE BAR OF CALIFORNIA**RECIPIENT**

Date:

Date:

By:

Print Title of State Bar Executive
Officer

By:

Print Name of Executive Director

By:

Print Title of Board Officer

THE STATE BAR OF CALIFORNIA
OFFICE OF ACCESS & INCLUSION – EQUAL ACCESS FUND
IOLTA FORMULA GRANT

ATTACHMENT A – GRANT ALLOCATION DETAIL

The below indicates the amount of the total grant award to be allocated to each county in which Recipient provides services, if applicable.

Recipient: «ProgramLegalName»

Equal Access Fund

Grant Period: January 1, «GrantYear» - December 31, «GrantYear»

Grant Amount: «FinalEAFGrantAllocation»

County	Qualified Expenditures	Basic Allocation	Pro Bono Allocation	Total Allocation
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