



Judicial Council of California

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REPORT TO THE JUDICIAL COUNCIL

Item No.: 23-157

For business meeting on September 19, 2023

Title

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

Agenda Item Type

Action Required

Effective Date

September 19, 2023

Rules, Forms, Standards, or Statutes Affected

None

Date of Report

August 16, 2023

Recommended by

State Bar Legal Services Trust Fund
Commission
Christian Schreiber, Chair

Contact

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Executive Summary

The Legal Services Trust Fund Commission recommends approval of the distribution of \$40,487,700 to the State Bar of California for the 2023 Equal Access Fund Interest on Lawyers' Trust Accounts (IOLTA)-Formula Grants and Partnership Grants for distribution to legal services providers and support centers to be used for legal services in civil matters for indigent persons and self-represented litigants to improve equal access and the fair administration of justice, as authorized by the Budget Act of 2023. This amount is contingent on filing fee income received for fiscal year 2023–24, which constitutes approximately 13 percent of this allocation. In accordance with the Budget Act, the Judicial Council will also reserve approximately 3 percent of the total for administration. The Legal Services Trust Fund Commission also recommends approval of the grant awards made by the commission, which comply with statutory and other relevant guidelines.

Recommendation

The Legal Services Trust Fund Commission recommends that the Judicial Council, effective September 19, 2023, approve the distribution of up to \$40,487,700 to the State Bar of California

for the 2023 Equal Access Fund IOLTA Formula Grants and Partnership Grants as authorized by the Budget Act of 2023, including:

- Up to 2.8 percent of the total, or \$1,158,900, for administration of the program; and
- After deducting administrative costs:
 - 90 percent of the total, or up to \$31,506,480, to be allocated through the IOLTA-Formula Grants to legal services providers and support centers to provide legal services in civil matters for indigent persons; and
 - 10 percent of the total, or \$3,500,720, to be allocated as Equal Access Fund Partnership Grants for projects conducted jointly by courts and legal services providers to make legal assistance available to self-represented litigants.

The list of proposed Partnership Grants is available at Attachment A.

Relevant Previous Council Action

The Judicial Council has approved the commission's recommended distributions of IOLTA-Formula and Partnership Grant funds for each of the past 23 years, consistent with the state Budget Act.

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 2019, the Equal Access Fund distribution increased to \$45 million, with one-time \$20 million of that allocated for homelessness prevention projects. The Equal Access Fund distribution for legal services not restricted to any case type was increased in 2021 to \$65 million and in 2022 is \$35 million.

The 2023 Budget Act (Assem. Bill 101 (Skinner)) (Link A) requires the Judicial Council to distribute the Equal Access Fund monies to legal services providers through the Legal Services Trust Fund Commission. The State Bar created the commission to administer the law regulating attorneys' interest-bearing trust accounts. (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 also requires that the Judicial Council 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, according to the Budget Act.

The Chief Justice, as chair of the Judicial Council, appoints 7 voting members and three nonvoting judicial advisors to the commission. The three nonvoting judicial advisors must comprise two superior court judges and one appellate justice. Relevant portions of the Budget

Act are in the commission's report (Attachment B), at pages 16–21. The membership roster is in the commission's report at pages 13–15.

Two grant programs make up the Equal Access Fund: (1) IOLTA-Formula Grants and (2) Partnership Grants. The Budget Act provides that 90 percent of the funds be distributed through IOLTA-Formula Grants to legal services agencies according to a statutory formula set out in Business and Professions Code section 6216. The formula distributes funds between qualified legal services providers based on the poverty population in the county and the amount each such organization spent in the prior calendar year providing free legal services to indigent persons in that county. Projects that use volunteers as the principal means of delivering legal services share an additional pro bono allocation, and support centers that provide technical and legal assistance to the legal services providers receive 15 percent of the IOLTA-Formula Grant funds.

The remaining 10 percent of the funds are to be distributed as Partnership Grants to legal services providers 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 Partnership Grants is set out in the commission's report at pages 8–9. The commission received significantly larger requests grant awards, totaling over \$5 million, for 2024. The commission's Partnership Grants Committee used a formal scoring rubric and calibration sessions, as well as other priority factors such as serving rural counties or substantive areas with anticipated increased need for 2024 to determine final award recommendations which were approved by the commission.

For the grant period funded by the 2023 Budget Act, the commission approved an allocation schedule for IOLTA-Formula Grants to legal services providers according to the formula established under the Bus. and Prof. Code. The allocation approved is \$31,506,480 (Attachment B)—which includes \$450,000 of projected filing fee revenue. Any filing fee revenue exceeding the allocation approved for distribution will be held as EAF reserve funds by the State Bar to cover any shortfalls in filing fee projections in fiscal year 2024–25.

The commission has also approved an allocation schedule for the Partnership Grants totaling \$3,500,720 (Attachment A). This includes \$50,000 of projected filing fee revenue. Similarly, any revenue exceeding the allocation approved for distribution will be held as EAF reserve funds by the State Bar to cover any shortfalls in filing fee projections in fiscal year 2024–25. The commission will distribute IOLTA-Formula and Partnership Grants funds on a calendar-year basis beginning January 1, 2024.

The commission has also determined that the proposed budget of each individual grant complies with statutory and other guidelines.

The computation of funds to reserve for administrative costs is based on two sections of the Budget Act. The Equal Access General Fund (Section 3, Schedule 5) allows a 2.5 percent allocation for administration, and the Equal Access Trial Court Trust Fund (Section 4, Schedule

7) allows a 5 percent allocation. Using this computation, a total of \$1,158,900, or 2.8 percent of the total allocation specified in the Budget Act, is reserved for administration by the State Bar and the Judicial Council.

Policy implications

The recommendation supports Goal I of the Strategic Plan for California’s Judicial Branch—Access, Fairness, Diversity, and Inclusion—by increasing representation for low-income persons and services to self-represented litigants, and by ensuring equal access to the courts, court proceedings, and programs.

Comments

This funding allocation is directed by the Budget Act. Therefore, public comment was not solicited and the commission received no additional comments.

Alternatives considered

There are no viable alternatives to distributing the funds according to the recommendations of the commission. The Budget Act requires the council to approve the distributions 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.

Judicial Council staff will work with the staff of the 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 its members appointed by the Chief Justice, to facilitate administration of the Equal Access Fund.

The recommendations 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 and Links

1. Attachment A: Partnership Grant Awards for Fiscal Year 2023–24
2. Attachment B: Equal Access Fund: Distribution of Funding for IOLTA-Formula Grants, Partnership Grants, and Care Court Grants under the Budget Act of 2023
3. Link A: Budget Act of 2023 (Assem. Bill 101 (Skinner)),
https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202320240SB101
4. Link B: Bus. & Prof. Code, § 6210,
https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=6210.5.&lawCode=BPC

5. Link C: Bus. & Prof. Code, § 6216,
https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=6216.&nodeTreePath=5.9.25&lawCode=BPC

Partnership Grant Awards for Fiscal Year 2023–24

a. Alliance for Children’s Rights	
Permanency Benefits Clinic Court Partnership	\$163,000
b. Bet Tzedek Legal Services	
Remote Pro Se Technology Initiative	\$150,000
c. Bet Tzedek Legal Services	
Decedent Estate Self-Help Clinic	\$165,000
d. California Rural Legal Assistance, Inc.	
San Joaquin County Housing Helpline Court Clinic Partnership	\$132,000
e. Central California Legal Services	
Guardianship Project.....	\$90,000
f. Community Legal Aid SoCal	
Norwalk Consumer Debt Series 2024.....	\$30,600
g. Community Legal Aid SoCal	
Compton Self-Help Economic Expansion Project Year 3	\$81,900
h. Community Legal Aid of SoCal	
Orange County Consumer Debt Series 2024	\$60,300
i. Elder Law & Advocacy	
Imperial County Restraining Order Clinic	\$92,000
j. Family Violence Law Center	
Domestic Violence Pro Per (DVPP) Project.....	\$25,000
k. Inland Counties Legal Services	
Family Law Assistance Project (FLAP).....	\$141,000
l. Inland Counties Legal Services	
Consumer Rights Clinic (CRC) Expanded	\$255,000
m. Justice & Diversity Center of the Bar Association of San Francisco	
Family Law Assisted Self-Help Project (FLASH)	\$70,000
n. Los Angeles County Bar Association Counsel for Justice	
Domestic Violence Legal Services Project (DVP)	\$104,000
o. Legal Access Alameda	
Family Law Day of Court	\$25,000
p. Legal Access Alameda	
Family Law Status Conference.....	\$65,000
q. Legal Aid Foundation of Los Angeles	
Torrance Self-Help Center Access Project	\$100,000

r. Legal Aid Foundation of Los Angeles	
Remote Self-Help Center Access Project	\$100,000
s. Legal Aid Foundation of Santa Barbara County	
Legal Resource Center Partnership	\$156,000
t. Legal Aid of Marin	
Homelessness Prevention Through Mandatory Settlement Conferences ...	\$80,000
u. Legal Aid Society of San Bernardino	
Caregivers and Small Estates Accessing Justice (CSEAJ)	\$165,000
v. Legal Aid Society of San Diego	
East County Restraining Order Clinic	\$190,000
w. Legal Aid Society of San Diego	
South Bay Restraining Order Project	\$180,000
x. Legal Assistance for Seniors	
Partnership to Assist Guardianship Litigants	\$55,000
y. Legal Assistance for Seniors	
Partnership to Assist Limited Conservatorship Litigants	\$50,000
z. Mental Health Advocacy Services	
Mental Health Court Clinic	\$180,000
aa. Neighborhood Legal Services	
Pomona-Ready for Trial!	\$107,000
bb. Neighborhood Legal Services	
Pasadena-Continuum of Services	\$150,000
cc. Neighborhood Legal Services	
Stabilizing Families Project	\$110,000
dd. Neighborhood Legal Services	
San Gabriel Valley-Remote Services-Housing	\$195,000
ee. Neighborhood Legal Services	
Remote Access - LA	\$225,000
ff. Neighborhood Legal Services	
Bridge to Self-Help	\$250,000
gg. Public Counsel	
Further Expansion of Appellate Clinic	\$182,700
hh. Public Counsel	
Guardianship Clinic	\$261,997
ii. Public Law Center	
Adoptive & DeFacto Parent Assistance Project	\$65,000

jj. San Diego Volunteer Lawyer Program

Central Division Restraining Order Clinic\$140,000

kk. Senior Citizens Legal Services

Indigent Landlord/Tenant Services and Mediation.....\$102,000



The State Bar of California

OFFICE OF ACCESS & INCLUSION

ATTACHMENT A to the report: Equal Access Fund: Distribution of Funds for IOLTA-Formula Grants, Partnership Grants, and CARE Court Grants under the Budget Act of 2023

DATE: August 14, 2023

TO: The Judicial Council of California

FROM: Doan Nguyen, Program Director, Office of Access & Inclusion
Rocio Avalos, Program Director, Office of Access & Inclusion

CC: Chris Schreiber, Chair, Legal Services Trust Fund Commission

SUBJECT: Equal Access Fund: Distribution of Funding for IOLTA-Formula Grants, Partnership Grants, and CARE Court Grants Under the Budget Act of 2023

EXECUTIVE SUMMARY

The Equal Access Fund (EAF) 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.

The purpose of this memo is to provide an overview of the EAF grants administered on behalf of the Judicial Council by the Legal Services Trust Fund Commission and the State Bar in 2023. The State Bar also requests that the Judicial Council approve a distribution of \$40,487,700 for the 2024 EAF IOLTA-formula Grants and Partnership Grants authorized by the Budget Act of 2023, which will be administered in the 2024 calendar year, and EAF reserves. This distribution amount includes:

- (1) \$35,007,200 of funding for Equal Access Fund grants, comprised of a General Fund allocation of \$34,507,200 and additional filing fee revenue of \$500,000 under the Uniform Civil Fees and Standard Fee Schedule Act. By the terms of the Budget Act, \$31,506,480 (90 percent) of these funds is allocated to EAF IOLTA-formula Grants and \$3,500,720 (10 percent) is allocated to Partnership Grants.
- (2) \$772,600 for administrative costs¹ to the State Bar pursuant to the Budget Act.

¹ Pursuant to the Budget Act, the Judicial Council receives one third of the administrative costs allocation, estimated at \$386,300 for the 2024 distribution year.

- (3) The remaining \$4,707,900 of filing fees will be retained as EAF reserve funds, used to cover any future disbursements delays or shortfalls in filing fee projections.
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BACKGROUND

In 1999, the State Budget Act established the Equal Access Fund (EAF) in the judicial branch budget to provide grants for free legal assistance to indigent Californians. 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 grants are administered through the Legal Services Trust Fund Commission (LSTFC) of the State Bar of California (see Attachment A1), but recommendations for the distribution of the grant funds must be approved by the Judicial Council. Relevant portions of the Budget Act of 2023 are included in Attachment A2.

The initial appropriation for the EAF in 1999 was \$10 million. This amount has since been increased with the addition of State Appropriation Limit funding for a few years, filing fee revenue,² and in more recent years, the appropriation of additional general fund monies.³ In the 2023-2024 state budget, the Legislature maintained its baseline appropriation of \$35 million for the EAF general fund, and included an additional \$21 million to fund legal assistance for the Community Assistance, Recovery, and Empowerment (CARE) Court program.

THE LEGAL SERVICES TRUST FUND PROGRAM

Eligibility for EAF IOLTA-Formula Grants

The Budget Act requires that 90 percent of the Equal Access Fund (EAF) grants be distributed “to qualified legal services projects and support centers as defined in sections 6213 through

² 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.

³ In 2016, the EAF general fund was increased by \$5 million to \$10,392,000. In 2017, it was increased by an additional \$5 million to \$20,392,000. In 2019 the Legislature also provided an increase of \$20 million to fund homelessness prevention activities. In 2021, the Legislature increased the appropriations by \$50 million, \$45 million of which was distributed through the LSTFC, and further included \$40 million for additional homelessness prevention activities. In 2022, the Legislature maintained its baseline appropriation of \$35 million for the EAF general fund but included an additional \$15 million for consumer debt legal assistance and \$30 million for homelessness prevention funding.

6215 of the Business and Professions Code.” Those provisions establish the basic eligibility requirements for the two categories of organizations that are entitled to receive IOLTA funding:

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

All legal services projects and support centers receiving IOLTA and EAF funding must be nonprofit corporations, maintain quality control procedures approved by the LSTFC, and meet minimum funding and service criteria that are set out in Business and Professions Code sections 6214-6215. Business and Professions Code sections 6210-6228 (referred to as the IOLTA statute) require 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.⁴

Administration and Oversight

Applicants are required to complete an extensive application for funding, which includes detailed information about the organization’s activities and services. The application also requires that an audit (or reviewed financial statement if an organization’s gross expenditures are less than \$500,000) by an independent certified public accountant accompanies the application to verify reported qualified expenditures.

State Bar staff reviews all applications to confirm eligibility and compliance with governing authorities. Complex eligibility issues are elevated to be reviewed and addressed by the LSTFC’s Eligibility & Budget Review Committee. The LSTFC then makes a determination of eligibility and the allocation of IOLTA-formula grant amounts. Once determined eligible, applicants are required to submit a proposed budget for use of the allocated 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 LSTFC reviews this budget to ensure that it complies with the requirements noted above before any funds are 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 grant agreement with each grant recipient.

Funding is then distributed to qualified organizations under the statutory allocation formula found at Business and Professions Code section 6216:

⁴ Business and Professions Code §§ 6218, 6220, 6221, 6223.

- Fifteen percent of the grant money is reserved for Support Centers and is divided among those organizations 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 pro bono allocation in each county where they so qualify.

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 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 LSTFC 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.

Eligibility for Partnership Grants

The Budget Act reserves up to 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. Under Business and Professions Code section 6213(a), Partnership Grants are restricted to Qualified Legal Services Projects (QLSPs).

The Budget Act identifies four requirements 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.

At the conclusion of each grant year, recipient organizations are required to submit an evaluation report on the use and impact of Partnership Grant funds. In conjunction with the Judicial Council, the LSTFC articulates funding priorities to guide the allocation of available funding among eligible proposals. In prior years, the primary focus of these grants was to "seed" new projects with start up funding for up to five years. For the 2024 grant year, the primary focus of these grants is to fund new projects and projects that serve rural areas.

Administration and Oversight of Partnership Grants

Applicants are required to complete a project proposal with a requested funding amount. The proposal includes detailed information on how the project plans to serve indigent self-represented litigants, a letter of support from the Partner Court's Presiding Judge, a written Memorandum of Understanding between the applicant and the Partner Court, staffing

information, anticipated service goals, a proposed budget, evaluation plans, and demonstrated efforts for project continuity.

Partnership Grants are awarded through a competitive process. The Partnership Grants Committee is charged with reviewing all proposals and making tentative funding recommendations to the LSTFC for final approval by the Judicial Council. State Bar staff confirms eligibility, and the Partnership Grants Committee utilizes a scoring rubric as a tool to guide review of all eligible proposals and to make funding recommendations. Unlike the EAF IOLTA-formula Grants, the Partnership Grants Committee is given discretion to make specific funding award recommendations. If selected for funding, applicants must submit a project budget describing how Partnership Grant monies will be used during the grant period.

Because all recipients of the Partnership Grants receive IOLTA and EAF IOLTA-formula Grants through the State Bar, they are already subject to the oversight processes in place, including monitoring visits to each organization every three years and submitting an evaluation report at specified reporting periods during and at the end of grant year.

Eligibility for CARE Court Grants

The Community Assistance, Recovery, and Empowerment Act created a new court program (CARE Court) where adults with qualifying, severe mental health issues can access behavioral health care, stabilization medication, housing, and other community services. The program will launch October 1, 2023, in Glenn, Orange, Riverside, San Diego, San Francisco, Stanislaus, and Tuolumne Counties and December 1, 2023, in Los Angeles County (participating counties).

CARE Courts must appoint QLSPs to represent those who are the subject of a CARE Court petition (respondents). Where no QLSP has agreed to represent respondents, the court must appoint a public defender instead. The LSTFC must fund QLSPs to represent respondents in CARE Act proceedings, matters related to CARE agreements and CARE plans. It must also fund qualified support centers to provide related training, support, and coordination.

The Budget Act provides the funding for these QLSPs, public defender, and support center services between October 1, 2023, and June 30, 2024. Eligibility to apply for a CARE Court grant is restricted to QLSPs and support centers as defined in Business and Professions Code section 6213. Applicants must have received an IOLTA grant from the LSTFC for 2023. Any funding not awarded to QLSPs to serve a county will go to that county's public defender office to represent respondents.

Administration and Oversight of CARE Court Grants

On March 24, 2023, the LSTFC created the CARE Court Grants Committee to approve a request for proposals (RFP) and recommend awards for 2023–2024.⁵ The committee approved an RFP on June 27, 2023 (Attachment A3).

CARE Court grants are awarded through a competitive process. Applicants are required to complete a project proposal with a requested funding amount. The CARE Court Grants Committee utilizes a scoring rubric to review all eligible proposals and to make funding recommendations.

QLSPs and support centers are already subject to LSTFC reporting and monitoring. The Budget Act requires the LSTFC also collect outcome data from QLSPs, support centers, and public defenders to whom it administers CARE Court funds. This data must use “the reporting framework developed by the [LSTFC] in consultation with the Judicial Council to ensure that data reporting is consistent and comparable across Judicial Council and Legal Services Trust Fund data...” State Bar staff is evaluating potential requirements for this reporting to propose to the Judicial Council in August.

DISCUSSION

2023 GRANTS ADMINISTRATION

Pursuant to the Judicial Council’s approval of recommended EAF grants last year, the State Bar is currently administering the 2023 EAF IOLTA-formula and Partnership Grants.

2023 EAF IOLTA-formula Grants

The approved \$31,626,571 for 2023 IOLTA-Formula Grants provides support to a total of 100 Legal Services Projects and Support Centers.⁶ The funds help 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

⁵ The LSTFC resolution states:

RESOLVED, that the [LSTFC] (commission) creates a CARE Court Grants committee (committee); and it is

FURTHER RESOLVED, that the commission delegates authority to the committee to approve a timeline and application for making 2023 CARE Court grants and—if consistent with the Budget Act of 2023—a request for proposals, scoring rubric, and reporting requirements; and it is

FURTHER RESOLVED, that a commissioner-staff team will review the 2023 CARE Court grant applications in consultation with the committee and that the committee will make award recommendations to the commission.

⁶ Initially, 101 organizations were approved for 2023 funding, but one organization, IEP Collaborative, Inc., declined its award shortly after the start of the grant year. Their portion of allocated EAF funds (\$1,660) will be rolled over to the 2024 distribution.

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 lingering effects of the pandemic have only exacerbated the severity of these issues and made funded legal services that much more valuable. A list of the 2023 grant recipients under the Budget Act of 2022 is included as Attachment A4.

2023 Partnership Grants

The approved \$2,786,000 for 2023 Partnership Grants provides support for 30 projects from 21 organizations that enhance the ability of unrepresented litigants to pursue justice in civil courts across California. These projects offer services in a variety of substantive areas, including but not limited to, housing, family, guardianship, estate planning, and small claims. In response to the court closures due to the pandemic, most programs have pivoted from initial plans and are currently providing remote and/or hybrid services to litigants. A list of the 2023 Partnership Grant recipients is included as Attachment A5.

Partnership Grants 2.0

On June 28, 2021, Governor Newsom signed Assembly Bill 128, the Budget Act of 2021, which appropriated \$68,847,067 to the Equal Access Fund for distribution as legal aid grants. This resulted in an unanticipated increase in the available 2022 Partnership Grant funding that will need to be encumbered or spent by June 30, 2023. Since the 2022 grant administration cycle concluded on July 29, 2021, the LSTFC decided to treat the additional \$3,880,237 Partnership Grant funding for 2022 as a separate grant under a new Request for Proposal (RFP), naming it Partnership Grants 2.0 (PG 2.0).

Applicants were given the option to apply for supplemental funding for an existing 2022 Partnership Grant project and/or complete and submit a new application. In March 2022, the LSTFC recommended funding of \$206,000 for 11 proposals supplementing approved 2022 Partnership Grant projects and \$3,674,237 for 14 new proposals for 2022-2023 Partnership Grant funding. The grants administration period for the supplemental PG 2.0 projects is April 1, 2022, to December 31, 2022 (9 months), whereas the period for new PG 2.0 projects is April 1, 2022, to December 31, 2023 (21 months). A list of the Partnership Grant 2.0 recipients is included in Attachment A6.

2024 GRANTS ADMINISTRATION

2024 EAF IOLTA-formula Grants

The 2024 EAF IOLTA-formula grant applications were released on April 3, 2023 and due on May 15, 2023. From May through July, State Bar staff and the Eligibility & Budget Review Committee reviewed applications to determine if applicants (1) meet primary purpose; (2) have identified appropriate qualified expenditures; and (3) have adequate quality controls in place, as determined by the State Bar, to ensure proper oversight and service.

The State Bar received 110 applications for funding for grant year 2024. There were 100 renewal applications and 10 new applications for funding. The LSTFC met on August 10, 2023, and approved funding for 89 qualified legal services providers and 21 support centers. The State Bar then calculated the grant award for each program based on funds available for EAF IOLTA-formula Grants under the Budget Act of 2023. Staff notified the organizations of their grant award and requested a program budget. Proposed budgets will be reviewed by State Bar staff to ensure grantee compliance with the statute, rules and guidelines, prior to distribution of grant funds. Proposed budgets will be presented to the LSTFC for approval at its November 9, 2023, meeting. Attachment A7 is a standard version of the grant agreements used for 2023 grants; we do not anticipate any substantive changes to the 2024 grant agreement.

The total estimated amount for 2024 EAF IOLTA-formula grants is \$31,506,480. Attachment A8 includes a list of 2024 EAF-IOLTA recipients.

2024 Partnership Grants

Request for Proposals for the Partnership Grant was released on January 27, 2023, and due on March 17, 2023.

Similar to the 2023 application process, for 2024, the Partnership Grants Committee implemented a formal scoring rubric to provide transparency to applicants, clarity to Committee members, and to ensure equity in the review process. The scoring rubric was included in the Request for Proposals (RFP) and the application was updated to align with the rubric categories (Attachment A9). After the RFP was released, the State Bar held an office hours webinar on February 3, 2023, to review the 2024 RFP requirements, scoring rubric, and updates made to the application.

For the 2024 Partnership Grants application cycle, 37 applications were received from 23 Qualified Legal Services Projects (QLSPs) requesting a total of \$5,062,000 in funding. All but one of the proposed projects are currently funded. The requested funding amounts ranged from \$25,000 to \$439,000. The proposed projects would address thirteen substantive areas, with most projects providing services in family/domestic violence, housing, and guardianship. In terms of geography, the proposed projects would span 16 counties in California.

Several processes were developed to ensure consistent scoring and interpretation of the rubric categories. The Partnership Grants Committee and staff engaged in an initial calibration process to ensure consistency in the application of the scoring rubric. This entailed each committee member and staff independently reviewing and scoring three selected proposals for discussion at its April 6, 2023, meeting. The committee discussed outlier scores, reasons for their own scores, and provided general guidance to the review team on how to apply the scoring rubric. Following initial calibration, the review team, comprised of staff and a rotating committee member(s), reviewed and scored the remaining proposals, applying the guidance from the committee. In order to address any scores that did not reach a consensus on a particular section, the review team took the average of each team member's score in order to calculate a final score for all proposals.

On May 17, 2023, the Committee reviewed all final rubric scores and developed tentative funding recommendations, based on past practice and in consideration of the criteria outlined in the rubric as well as other priority factors such as serving rural counties or substantive areas with anticipated increased need for 2024. Applicants were provided an opportunity to provide feedback about the potential impact of the tentative funding amount on their proposed project and to ask follow-up questions about the application review process.

The Committee confirmed funding recommendations on July 19, 2023. The LSTFC adopted those recommendations on August 10, 2023, and presents them now to the Judicial Council. The Council has final responsibility for approving the LSTFC's recommendations for grant awards at its September 2022 meeting.

The total estimated amount available for the 2024 Partnership Grant Awards is \$4,694,497. The LSTFC requests the Council's approval for the following Partnership Grant awards totaling \$4,694,497. Historically, the total requested amount for Partnership Grants has been in the range of \$2.4 to \$2.6 million. For 2024, the total requested amount is over \$5 million. This year, both 2023 and Partnership Grant 2.0 recipients submitted proposals, with the latter requesting significantly larger grant awards.

Attachment A10 includes a list of 2024 Partnership Grant recipients and a brief summary of each project.

2023-2024 CARE Court Grants

The CARE Court Grants RFP and grant application were released on June 30, 2023, with a subsequent webinar held on July 6, 2023. Applications for 2023–2024 CARE Court grants were due July 17, 2023.

A team of two committee members and two staff members scored applications in July. The CARE Court Grants Committee met on August 1, 2023, to recommend awards to the LSTFC. The LSTFC approved these grants at its meeting on August 10, 2023. Grantees will sign agreements with the State Bar this September so that the grant period may start by October 1, 2023.

The total amount available for the 2023-2024 CARE Court grants is \$21,420,000. Funding not awarded to QLSPs and support centers will be distributed to public defender offices. Attachment A11 includes a list of 2023-2024 CARE Court Grant recipients.

2024 DISTRIBUTION REQUEST TO THE COUNCIL

The State Bar requests an estimated 2024 grant distribution of (1) \$40,487,700 pursuant to the Budget Act of 2023 for EAF IOLTA-formula Grants, Partnership Grants, and costs of administration; and (2) approval of the grants specified below as follows:⁷

⁷ The sum actually allocated as grants may vary from this figure by a negligible amount due to rounding.

2024 EAF IOLTA-Formula Grants – Distribution Request

The State Bar requests that the Judicial Council approve 2024 EAF IOLTA-formula Grants in the amount \$31,506,480 which includes the General Fund Budget Act allocation of \$31,056,480 and projected filing fee revenue of \$450,000.

2024 Partnership Grants – Distribution Request

The State Bar requests a distribution of \$3,500,720 for 2024 Partnership Grants for calendar year 2024, which includes the General Fund Budget Act allocation of \$3,450,720 and projected filing fee revenue of \$50,000. These discretionary grants are being awarded exclusively to organizations that are eligible for IOLTA funding, after a careful analysis of grant proposals, based on established criteria. Partnership Grants will, upon approval, be distributed as early in 2024 as practicable to projects that have completed the required documentation.

CARE Court Grants – Distribution Request

The State Bar requests a distribution of \$22,852,000 for 2024 CARE Court grants for calendar year 2024, which includes the General Fund Budget Act allocation of \$20,400,000 to Qualified Legal Service Providers, and \$1,020,000 to Support Centers, and \$1,432,000 for administrative costs. CARE Court Grants will, upon approval, be distributed by the anticipated grant start date of October 1, 2023.

2024 Administrative Allocation

The 2023 Budget Act allocates 2.5 percent for administrative costs for the IOLTA Formula Grants and 5.0 percent for administrative costs from the filing fees. The State Bar requests that the Judicial Council approve a distribution of \$772,600 for administrative costs, which is two thirds of the total amount. The remaining 386,300 is the Judicial Council's share of administrative costs.

NEXT STEPS

The Budget Act provides that “the Judicial Council shall approve awards made by the LSTFC 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 estimated 2024 distribution of four equal disbursements for IOLTA-formula Grants to legal services providers determined by the LSTFC to be in compliance with statutory and other applicable guidelines, eligible grantees are identified in Attachment A7. 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 2023-2024 fiscal year.

The distribution of \$4,694,497 for Partnership Grants, and the approval of the Partnership Grants recommended by the LSTFC as set forth in detail in Attachment A10.

The LSTFC, working through staff, will be responsible for the administration of these Equal Access Funds. The LSTFC 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.

SUMMARY OF COUNCIL ACTION REQUESTED

The State Bar requests that the Judicial Council approve a distribution of \$40,487,700 to the State Bar pursuant to the Budget Act of 2023. This sum includes:

- (1) \$35,007,200 of funding for Equal Access Fund grants, comprised of a General Fund allocation of \$34,507,200 and additional filing fee revenue of \$500,000 under the Uniform Civil Fees and Standard Fee Schedule Act. By the terms of the Budget Act, \$31,506,480 (90 percent) of these funds is allocated to EAF IOLTA-formula Grants and \$3,500,720 (10 percent) is allocated to Partnership Grants. \$21,420,000 of funding for CARE Court Grants.
- (2) \$772,600 for administrative costs to the State Bar pursuant to the Budget Act.
- (3) The remaining \$4,707,900 of filing fees will be retained as EAF reserve funds, used to cover any future disbursements delays or shortfalls in filing fee projections.

The above requests exclude returned and residuary funding of previously distributed grant funds. There is approximately \$1,193,777 by the end of 2022 in residuary Partnership Grants funds, which will be distributed during the 2024 or future grant year(s). As of December 31, 2022, the total EAF reserve is \$2,922,514. Since the filing fee revenue is partly based on projections, if there is excess filing fee revenue, the State Bar proposes using these funds to supplement the EAF reserves. Council approval is necessary to enable timely distribution of funds.

ATTACHMENTS LIST

- A1.** 2022-2023 Legal Services Trust Fund Commission Roster
- A2.** Relevant Portions of the 2023 State Budget Act

- A3.** Request for Proposal for 2023-2024 CARE Court Grant
- A4.** 2023 IOLTA-Formula Equal Access Fund Grant Recipients
- A5.** 2023 Partnership Grant Recipients
- A6.** Partnership Grant 2.0 Recipients
- A7.** Sample Grant Agreement for 2023 IOLTA-Formula Equal Access Fund Grants
- A8.** 2024 EAF IOLTA Eligible Grantees
- A9.** Request for Proposal for 2024 Partnership Grants
- A10.** Summary of 2024 Partnership Grant Proposals
- A11.** 2023-2024 CARE Court Grant Recipients

**LEGAL SERVICES TRUST FUND COMMISSION 2022-2023
OPEN ROSTER**

Christian Schreiber, Chair (2023) Olivier & Schreiber, LLP (State Bar appointee)	Amin Al-Sarraf, Co-Vice Chair (2023) Locke Lord, LLP (State Bar appointee)
Erica Connolly, Co-Vice Chair (2026) Office of the California Attorney General (State Bar appointee)	Banafsheh Akhlaghi (2023) NLSCA (Judicial Council appointee)
Jeffrey K. Ball (2024) Orange County Business Council (State Bar appointee)	Hon. Louise Bayles-Fightmaster (2024) Fightmaster Mediation & Private Judging (Judicial Council appointee)
Catherine Blakemore (2026) (Senate appointee)	Will Boschelli (2023) (State Bar appointee)
Venetta Campbell (2026) Ventoney Enterprises Corporate Consultancy (Legal Services Trust Fund Commission appointee)	Efrain Escobedo (2027) (Speaker of the Assembly appointee)
Jason B. Galkin (2024) Superior Court of California, County of Nevada (Judicial Council appointee)	J. Eric Isken (2024) Retired (State Bar appointee)

**LEGAL SERVICES TRUST FUND COMMISSION 2022-2023
OPEN ROSTER**

Angie King (2026) (Legal Services Trust Fund Commission Appointee)	Clifford Klein (2026) (California Legislature)
Hon. Diana Kruze (Ret.) (2024) (Judicial Council appointee)	Joseph D. Lee (2024) Munger, Tolles & Olson (Judicial Council appointee)
Tammy Mahoney (2024) Luther Burbank Savings (Senate appointee)	James Meeker (2023) Department of Criminology Law & Society University of California, Irvine (State Bar appointee)
Patience Milrod (2023) (Judicial Council appointee)	Maria Morales (2027) (Speaker of the Assembly)
Xavier Vargas (2026) (Legal Services Trust Fund Commission appointee)	
<u>ADVISOR</u> Hon. Victor Rodriguez (2026) (Judicial Council appointee)	<u>ADVISOR</u> Hon. Brad Seligman (2024) Superior Court of California, County of Alameda (Judicial Council appointee)

**LEGAL SERVICES TRUST FUND COMMISSION 2022-2023
OPEN ROSTER**

<p><u>ADVISOR</u></p> <p>Hon. Bryant Yang (2025)</p> <p>Superior Court of California, County of Los Angeles</p> <p>(Judicial Council appointee)</p>	<p><u>LIAISON</u></p> <p>Salena Copeland</p> <p>Legal Aid Association of California (LAAC)</p>
<p><u>LIAISON</u></p> <p>Melanie Snider</p> <p>(Judicial Council)</p>	<p><u>LIAISON</u></p> <p>Laura Brown</p> <p>(Judicial Council)</p>

Attachment A2. Relevant Portions of the State Budget Act of 2023

2023 BUDGET ACT LANGUAGE RELEVANT TO THE EQUAL ACCESS FUND**Senate Bill No. 101****CHAPTER 12**

An act making appropriations for the support of the government of the State of California and for several public purposes in accordance with the provisions of Section 12 of Article IV of the Constitution of the State of California, relating to the state budget, to take effect immediately, budget bill.

Approved by Governor June 27, 2023. Filed with Secretary of State June 27, 2023.

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

[...]

0250-001-0001—For support of Judicial Branch642,871,000

Schedule:

[...]

(3) 0140-Judicial Council311,639,000

[...]

Provisions:

[...]

19. Of the funds appropriated in Schedule (3), \$3,230,000 is available for the implementation of the Community Assistance, Recovery, and Empowerment Act (Part 8 (commencing with Section 5970) of Division 5 of the Welfare and Institutions Code).

[...]

21. Of the amount appropriated in Schedule (3), \$1,432,000 shall be distributed by the Judicial Council to the Legal Services Trust Fund Commission of the State Bar of California for administrative costs related to allocating resources for legal services to implement the Community Assistance, Recovery, and Empowerment Act (Part 8 (commencing with Section 5970) of Division 5 of the Welfare and Institutions Code). The commission shall coordinate with the Judicial Council to ensure that the commission collects and reports the data necessary for the Judicial Council to comply with all Community, Assistance, Recovery, and Empowerment Act reporting requirements.

(a) The Legal Services Trust Fund Commission shall be responsible for collecting outcome data from each county's public defender office, qualified legal services projects, and support centers. The State Bar of California shall annually provide to the Judicial Council a report that includes funding allocations, annual expenditures, and program outcomes by service area and service provider. Data shall be reported using the reporting

Attachment A2. Relevant Portions of the State Budget Act of 2023

framework developed by the Legal Services Trust Commission in consultation with the Judicial Council to ensure that data reporting is consistent and comparable across Judicial Council and Legal Services Trust Fund data. The Judicial Council shall include this report in the annual report pursuant to Section 5985 of the Welfare and Institutions Code.

22. For the funds appropriated in Schedule (3) of this item and Schedule (1) of 0250-101-0932 for the implementation of the Community Assistance, Recovery, and Empowerment Act (Part 8 (commencing with Section 5970) of Division 5 of the Welfare and Institutions Code), the Judicial Council shall provide two reports on key data for each trial court implementing the act. The first report shall cover July 1, 2023, to December 31, 2023, inclusive, and shall be submitted no later than February 1, 2024, to the Joint Legislative Budget Committee and the budget committees of each house of the Legislature. The second report shall cover January 1, 2024, to March 31, 2024, inclusive, and shall be submitted no later than May 1, 2024. The reports shall include monthly data critical to determining appropriate funding needs to support the successful implementation of this act, which shall include, but are not limited to, the following: (1) the number of program petitions received and dismissed, (2) the number of people admitted to the program, (3) the number of court proceedings conducted and the amount of time needed for those hearings, (4) the amount of judicial and staff time required to process cases, and (5) the amount of time spent by legal counsel representing and working with program clients as well as what type of entity is providing legal counsel, both statewide and by county.

0250-101-0001—For local assistance, Judicial Branch 140,723,000

Schedule:

[...]

(5) 0150083-Equal Access Fund62,062,000

[...]

Provisions:

1. In order to improve equal access and the fair administration of justice, \$35,392,000 of 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. Up to 10 percent of the funds appropriated for purposes of this provision shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and not less than 90 percent of the funds appropriated for purposes of this provision shall be distributed consistent with Sections

Attachment A2. Relevant Portions of the State Budget Act of 2023

6216 to 6223, inclusive, of the Business and Professions Code. Any funding not allocated for joint projects shall be redistributed 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. Of the amount appropriated for purposes of this provision, not more than 2.5 percent shall be available, upon order of the Department of Finance, for administrative costs of the Judicial Council and the State Bar.

2. In order to improve equal access and the fair administration of justice, \$5,000,000 shall be annually appropriated in Schedule (5) by the Judicial Council to the California Access to Justice Commission for grants to civil legal aid nonprofits, including qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used to support the infrastructure and innovation needs of legal services in civil matters for indigent persons. Of this amount, not more than 2.5 percent shall be available for administrative costs of the California Access to Justice Commission associated with distributing and monitoring the grants.
3. The California Access to Justice Commission shall make award determinations for grants described in Provision 2. In awarding these grants, preference shall be given to qualified legal aid agencies' proposals that focus on services to rural or underserved immigrant communities regardless of citizenship status and proposals that are innovative or that involve partnership with community-based nonprofits. Any funding not allocated in a given fiscal year shall be reallocated pursuant to Provision 1.
4. The grant process described in Provision 2 shall ensure that any qualified legal service project and support center demonstrates a high need for infrastructure and innovation to ensure that funding is distributed equitably among qualified legal service projects and support centers. The qualified legal service project or support center shall demonstrate that funds received under this provision will not be used to supplant existing resources.
5. The funds described in Provisions 1 and 2 are available for encumbrance or expenditure until June 30, 2025.
6. The amount appropriated in Schedule (1) is available for reimbursement of court costs related to the following activities: (a) payment of service of process fees billed to the trial courts pursuant to Chapter 1009 of the Statutes of 2002, (b) payment of the court costs payable under Sections 4750 to 4755, inclusive, and Section 6005 of the Penal Code, and (c) payment of court costs of extraordinary homicide trials.

Attachment A2. Relevant Portions of the State Budget Act of 2023

0250-101-0932—For local assistance, Judicial Branch, payable from the Trial Court Trust Fund
 **3,371,901,000**

Schedule:

(1) 0150010-Support for Operation of Trial Courts2,719,070,000
 [...]
 (7) 0150083-Equal Access Fund 5,482,000
 [...]

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 of the Courts, 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.
 [...]
36. Of the funds appropriated in Schedule (1), \$29,449,000 is available for the implementation of the Community Assistance, Recovery, and Empowerment Act.

Attachment A2. Relevant Portions of the State Budget Act of 2023

0250-162-8506—For local assistance, Judicial Branch, payable from the Coronavirus Fiscal Recovery Fund of 202120,000,000

Schedule:

[...]

(2) 0150083-Equal Access Fund 20,000,000

[...]

Provisions:

1. The funding in Schedule (2) shall be distributed by the Judicial Council through the Legal Services Trust Fund Commission of the State Bar of California pursuant to this provision to qualified legal services projects and support centers to provide eviction defense, other tenant defense assistance in landlord-tenant rental disputes, or services to prevent foreclosure for homeowners, including pre-eviction and eviction legal services, counseling, advice and consultation, mediation, training, renter education, and representation, and legal services to improve habitability, increasing affordable housing, ensuring receipt of eligible income or benefits to improve housing stability, legal help for persons displaced because of domestic violence, and homelessness prevention. Of this amount, no more than 5 percent shall be available, upon order of the Department of Finance, for administrative costs of the Judicial Council and the State Bar of California, provided that funds spent shall not exceed the actual costs of administration. Unspent administrative funds shall be redistributed to qualifying grantees as prescribed by the commission.
2. The funds, after covering administrative costs as described in Provision 1, shall be used to provide funds during the 2023–24 fiscal year pursuant to homelessness prevention grants already awarded by the Legal Services Trust Fund Commission to qualified legal services projects and support centers pursuant to Item 0250-162-8506, Budget Act of 2021 (Chs. 21, 69, and 240, Stats. 2021).
3. Funds appropriated in Schedule (2) are available for encumbrance or expenditure until December 31, 2025.
4. The State Bar of California shall annually provide to the Judicial Council a report that includes funding allocations, annual expenditures, and program outcomes by service area, and service provider for all Equal Access Fund and federal funding. Data shall be reported using the established reporting framework in the Equal Access Program including applicable outcome measures reported in Legal Services standardized reporting, state level performance measures, and main benefits scores. The Judicial Council shall provide the report to the Department of Finance by January 1 of each year for the prior fiscal year.

Attachment A2. Relevant Portions of the State Budget Act of 2023

0250-493—Reappropriation, Judicial Council. The balances of the appropriations provided in the following citations are reappropriated for the purposes provided in those appropriations and shall be available for encumbrance or expenditure until June 30, 2024:

0001—General Fund

(1) Up to \$1,750,000 of the amount appropriated in Schedule (3) of Item 0250-001-0001 of the Budget Act of 2022 (Chs. 43, 45, and 249, Stats. 2022), for implementation of the Community Assistance, Recovery, and Empowerment Act.



**The State Bar
of California**

2023–2024 Community Assistance, Recovery, and Empowerment (CARE) Court Grant Request for Proposals

BACKGROUND

On September 14, 2022, Governor Newsom signed the Community Assistance, Recovery, and Empowerment (CARE) Act.¹ The CARE Act creates a new court program (CARE Court) where adults with qualifying, severe mental health issues can access behavioral health care, stabilization medication, housing, and other community services. The program will launch October 1, 2023, in Glenn, Orange, Riverside, San Diego, San Francisco, Stanislaus, and Tuolumne Counties and December 1, 2023, in Los Angeles County (participating counties).²

CARE Courts must appoint qualified legal services projects (QLSPs) to represent those who are the subject of a CARE Court petition (respondents). Where no QLSP has agreed to represent respondents, the court must appoint a public defender instead.³ Furthermore, the Legal Services Trust Fund Commission (LSTFC) must fund QLSPs to represent respondents “in CARE Act proceedings, matters related to CARE agreements and CARE plans.”⁴ The LSTFC must also fund qualified support centers to provide related “training, support, and coordination.”⁵

Senate Bill 101 (SB 101) provides the funding for these QLSP, public defender, and support center services between October 1, 2023, and June 30, 2024, in the eight

1 Welfare and Institutions Code §§ 5970–87.

2 The CARE Act requires all these counties except for Los Angeles to launch by October 1, 2023. All other counties in California—including Los Angeles—must launch by December 1, 2024. Welfare and Institutions Code § 5970.5. Los Angeles County plans to launch its CARE Court program one year early—by December 1, 2023.

3 Welfare and Institutions Code § 5977.

4 Welfare and Institutions Code section 5981.5 requires the LSTFC to fund QLSPs “to provide legal counsel appointed pursuant to subdivision (c) of [Welfare and Institutions Code] Section 5976...” Section 5976(c) states that respondents have the right to “counsel at all stages of a proceeding...regardless of the ability to pay.”

5 Ibid.

participating counties.⁶ The amount for QLSPs and public defenders to represent respondents in CARE Court will be at least \$20,400,000. Support centers could receive up to \$1,020,000 to provide legal training and technical assistance to implement the CARE Act.⁷

Before making awards to QLSPs, the LSTFC must determine an amount of funding available to represent respondents in each of the participating counties. The formula to allocate this funding will set a minimum amount for each county and adjust for the relative cost of providing representation there (see the section “Distributing Funds by County,” below, for more information). Any funding not awarded to QLSPs to serve a county will go to that county’s public defender office to represent respondents.⁸

On March 24, 2023, the LSTFC created a committee to make 2023–2024 CARE Court awards to QLSPs and support centers.⁹ The LSTFC CARE Court Grants Committee (committee) then met on June 27, 2023, to discuss and approve this request for proposals (RFP). The RFP is subject to changes in the law including, but not limited to, the Budget Act of 2023 and changes to the CARE Act. 2023–2024 CARE Court grant applications are due on the State Bar of California’s grants portal, SmartSimple, by July 17, 2023, at 5:00 p.m. (PDT).

⁶ The Legislature passed SB 101 on June 15, 2023. The text of this legislation is available at [leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202320240SB101](https://leginfo.ca.gov/faces/billTextClient.xhtml?bill_id=202320240SB101). Pending the Governor’s signature, SB 101 will become the Budget Act of 2023.

⁷ SB 101 also provides \$1,432,000 to the LSTFC and State Bar to administer this funding to QLSPs, public defenders, and support centers. This will include collecting and reporting data on expenditures and outcomes.

⁸ SB 101.

⁹ The LSTFC resolution states:

RESOLVED, that the [LSTFC] (commission) creates a CARE Court Grants committee (committee); and it is

FURTHER RESOLVED, that the commission delegates authority to the committee to approve a timeline and application for making 2023 CARE Court grants and—if consistent with the Budget Act of 2023—a request for proposals, scoring rubric, and reporting requirements; and it is

FURTHER RESOLVED, that a commissioner-staff team will review the 2023 CARE Court grant applications in consultation with the committee and that the committee will make award recommendations to the commission.

ELIGIBILITY TO APPLY

Eligibility to apply for a 2023–2024 CARE Court grant is restricted to QLSPs and support centers as defined in Business and Professions Code section 6213.¹⁰ Applicants must have received an Interest on Lawyers’ Trust Accounts (IOLTA) grant from the LSTFC for 2023.¹¹

GRANT PARAMETERS

1. The 2023–2024 CARE Court awards may fund only the work that the Budget Act of 2023 permits. For example, SB 101 funds QLSPs “to provide legal counsel pursuant to subdivision (c) of Section 5976 of the Welfare and Institutions Code for representation in CARE Act proceedings, matters related to CARE agreements, and CARE plans.”
2. These grants are not to fund the wraparound services or supports (e.g., housing) that become part of respondents’ CARE agreements or plans.¹² Additionally, lobbying and legal services unrelated to CARE agreements and CARE plans (e.g., helping a client to apply for immigration status) fall outside the scope of SB 101.¹³
3. SB 101 requires the LSTFC to determine an amount of funding that each county will receive. See the next section, “Distributing funds by county,” for how the LSTFC will distribute funding for QLSPs and public defenders in 2023–2024.

QLSPs may apply for some or all of each county’s allocation. In doing so, they must specify the amount of the allocation they are seeking and number of clients they would be available to represent in that county. When evaluating QLSP applications, the committee will compare this information to each county’s available funding and case estimates—see Table 1, below.

¹⁰ Welfare and Institutions Code § 5981.5 and SB 101.

¹¹ QLSP and support center status is a requirement to receive IOLTA, Equal Access Fund, and some other state and federal funding to provide or support civil legal aid to indigent Californians. Nonprofit organizations and nonprofit law school clinics must reapply for QLSP and support center status every year. They are then subject to monitoring by and reporting to the LSTFC and State Bar of California. For more information, see Business and Professions Code sections 6210–6228.

¹² Welfare and Institutions Code section 5971 defines “CARE agreement” as “a voluntary settlement agreement...[that] includes the same elements as a CARE plan to support the respondent in accessing community-based services and supports.” A “CARE plan” is “an individualized, appropriate range of community-based services and supports, as set forth in this part, which include clinically appropriate behavioral health care and stabilization medications, housing, and other supportive services, as appropriate, pursuant to Section 5982.”

¹³ Welfare and Institutions Code section 5971 defines “CARE process” as “the [CARE] court and related proceedings to implement the CARE Act.”

Support centers will have a separate allocation to serve some or all of the participating counties. The maximum amount that a support center may request is \$500,000. There is no minimum amount of funding that QLSPs and support centers may request.

4. Services must start—QLSPs, for example, must be ready to accept appointments—by October 1, 2023, for Glenn, Orange, Riverside, San Diego, San Francisco, Stanislaus, and Tuolumne Counties.¹⁴ Services must start by December 1, 2023, for Los Angeles County. The grant period will end on June 30, 2024.
5. CARE Courts may appoint QLSPs to represent non-indigent respondents. QLSP and support center grantees need to track spending on any services to non-indigent clients. They must deduct this spending on their annual IOLTA application pursuant to Business and Professions Code sections 6213 and 6216.

DISTRIBUTING FUNDS BY COUNTY

SB 101 proposes \$20,400,000 for QLSPs and public defenders to represent respondents in 2023–2024. The committee determined the amount available in each participating county as follows:

1. **Allocate funds by general population:** Divide each county’s population by the total population of all participating counties. Multiply the resulting percentage by the total funding for QLSPs and public defenders. This yields an initial amount for each county.
2. **Set a funding floor:** If step 1 provides less than \$60,000 to a county, raise its allocation to \$60,000 and adjust the remaining counties’ allocations proportionally.
3. **Adjust for the relative cost of providing counsel:** Except for counties where the allocation is \$60,000 pursuant to step 2, apply a cost-of-counsel factor. This calculation will be based on the average combined salary/wage for public defender attorneys and paralegals in each county.¹⁵

A total of \$20,400,000 would yield the allocations below. The final column (“Estimated number of cases in 2023–24”) provides context to help with application budgets. The Governor’s Office anticipates about 4,000 cases in 2023–2024:

14 Welfare and Institutions Code § 5970.5.

15 The LSTFC may use each county’s most recent pay data—for the same or similar period—from the California State Controller’s Office or comparable database for public defender office pay.

Table 1: Funding to Represent Respondents in Each County

County	Funding allocation	Estimated cases ¹⁶	Funding per estimated case ¹⁷
Glenn	\$60,000	6	\$10,000
Los Angeles	\$10,158,089	1,938	\$5,242
Orange	\$2,852,842	628	\$4,543
Riverside	\$2,490,970	493	\$5,053
San Diego	\$3,135,413	653	\$4,802
San Francisco	\$1,230,524	161	\$7,643
Stanislaus	\$412,162	110	\$3,747
Tuolumne	\$60,000	11	\$5,455
Total	\$20,400,000	4,000	

SB 101 proposes up to \$1,020,000 for support centers to provide legal training and technical assistance to implement the CARE Act. Any amount remaining from the support center allocation must go to QLSPs and public defenders to represent respondents.

SCORING CRITERIA

LSTFC award decisions are final and without appeal. A successful proposal will persuasively describe the applicant's ability to perform the proposed work. For QLSPs this includes, among other factors, the organization's experience:

- Serving adults "experiencing a severe mental illness, as defined in paragraph (2) of subdivision (b) of [Welfare and Institutions Code] Section 5600.3 and has a diagnosis identified in the disorder class: schizophrenia spectrum and other psychotic disorders, as defined in the most current version of the Diagnostic and Statistical Manual of Mental Disorders."¹⁸
- Representing clients in mental health cases such as LPS conservatorships or assisted outpatient treatment matters.

¹⁶ The Governor's Office anticipates about 4,000 cases in 2023–2024. The estimate for each county is based on its share of the general population for all participating counties.

¹⁷ This column divides each county's funding allocation (column two) by its share of estimated cases in 2023–2024 (column three). SB 101's funding for QLSP and public defender representation assumes that a typical CARE Court case will take about 40 hours. This column, therefore, might provide a high estimate of the funding available per case if a typical matter takes more than 40 hours to resolve.

¹⁸ Welfare and Institutions Code § 5972.

- Helping clients to access the types of community-based services and supports that Welfare and Institutions Code section 5982 describes. This includes behavioral health care, housing, and other services.
- Litigating and negotiating (e.g., with county behavioral health agencies).

Additionally, it should be clear how all grant-funded activities would comply with the CARE Act and Budget Act of 2023.

The committee has adopted the following rubric to guide its deliberations:

Category	Exceeds Expectation	Meets Expectation	Below Expectation	Not Addressed
Project impact and strategies: The applicant describes how it will significantly and directly perform the role of QLSP or support center under the CARE Act and Budget Act.				
Qualifications: The applicant demonstrates that it has the qualifications (e.g., knowledge, experience, and relationships) that it needs to accomplish the proposal's goals.				
Number of check marks	X21-25 points	X11-20 points	X1-10 points	X0 points
Subtotal				
Administration: The applicant demonstrates that it has the organizational capacity (e.g., supervision structure and resources) that it needs to meet the proposal objectives.				
Project evaluation: The applicant details how it will acquire and use data to measure the effectiveness of its services and meet reporting requirements				
Number of check marks	X15 points	X10 points	X5 points	X0 points
Subtotal				
Total				

The rubric is a tool to guide committee and LSTFC discussion of proposals. A comparatively high score does not guarantee funding. The committee and LSTFC may still exercise discretion to make awards that best accomplish the statutory goals of this funding.

The following explanations refer to the rubric:

- **Not addressed:** A proposal that scores “not addressed” in a category/criterion fails to satisfy that criterion in a meaningful way or lacks the relevant nexus. A proposal might fail to satisfy a criterion in a meaningful way if it articulates only a vague intention to do so.
- **Below expectations:** A proposal that scores “below expectations” in a category/criterion addresses that criterion but is insufficiently competitive or persuasive to justify a score of “meets expectations.” For example, the proposal might lack sufficient detail, explanation, or basis in fact to demonstrate its contours or likelihood of success. Since such a proposal might still articulate a feasible project, this score confers some points.
- **Meets expectations:** A proposal that scores “meets expectations” in a category/criterion is competitive and persuasive with respect to that row of the rubric. To be competitive, the proposal will be sufficiently ambitious and/or compelling to merit the use of competitive funds. To be persuasive, the proposal will describe circumstances sufficiently probative of the applicant’s intention and ability to accomplish its stated objectives in that criterion.
- **Exceeds expectations:** A proposal that scores “exceeds expectations” in a category/criterion satisfies the standard for “meets expectations” while standing out as particularly compelling or impressive. A project might be especially compelling, for instance, because its strategies would be unusually impactful. Or the proposal might be exceptionally detailed, thorough, evidence-driven, or otherwise well-conceived and convincing.

GRANTMAKING TIMELINE

Table 2: 2023–2024 CARE Court Grant Timeline

Date(s)*	Activity
June 27, 2023	The committee approves the RFP
June 30, 2023	The application releases
July 17, 2023	Applications are due
August 2, 2023	The committee recommends awards to the LSTFC
August 10, 2023	The LSTFC approves awards

Date(s)*	Activity
August-September 2023	Applicants sign grant agreements
October 1, 2023	Grant period starts
October 1, 2023	Services start for Glenn, Orange, Riverside, San Diego, San Francisco, Stanislaus, and Tuolumne Counties
December 1, 2023	Services start for Los Angeles County

*Some dates are approximate to accommodate applicant, LSTFC, and staff availability and needs.

THE APPLICATION

A complete 2023–2024 CARE Court application will include the components below. Please see the application instructions for detailed guidance.

- 1. Project profile**

The project profile will include high-level information about the project such as its funding request, counties of focus, and abstract.

- 2. Project description**

The project description will include information about the applicant’s qualifications and deliverables. This includes the project’s goals, activities, targets for representation, and strategies for outreach, accessibility, and evaluation. It will also ask about the applicant’s qualifications and resources to perform the work safely and effectively.

- 3. Project budget**

The budget will include information on how the applicant proposes to spend 2023–2024 CARE Court funds in each county for which they apply. Applicants will need to identify staff by their role (e.g., “Managing attorney”) and estimate the amount of time that these roles would spend on the project. The project staff, budget, and description should be consistent with one another.

- 4. Budget narrative**

The budget narrative will include information about each line of the budget, noting whether the grant will directly pay for specific items or be allocated on a percentage or other basis.

- 5. Project assurances**

Each applicant will have to acknowledge that:

1. It agrees that it will use any funds it receives from a 2023–2024 CARE Court grant only for the purposes stated in its application. Should the State Bar of California (State Bar) determine in its sole discretion that the applicant is unlikely to use all

funds received for these purposes within the grant period, the applicant will return funds to the State Bar as directed by the State Bar.

2. It will not discriminate based on race, color, national origin, religion, gender, disability, age, marital or domestic partnership status, medical condition, or sexual orientation.
3. It will comply with quality control procedures adopted by the State Bar.
4. It will permit reasonable site visits and will present additional information deemed reasonably necessary to determine compliance with the terms of the grant.
5. It will comply with fiscal management and control procedures adopted by the State Bar.
6. It understands that any proposal submitted for a 2023–2024 CARE Court grant, and all documents submitted pursuant to issuance of 2023–2024 CARE Court funding, are public documents, and may be disclosed to any person.
7. It agrees it will file regular program and financial reports, as may be required by the State Bar, and cooperate with other data collection requests by the State Bar for this grant project.
8. The State Bar is permitted, in its sole discretion, to adjust Applicant’s award at any time to reflect the actual amount of funding available for 2023–2024 CARE Court grants. Consequently, grantees shall not be guaranteed any specific dollar amount in grant funds, or any grant funds at all, if funds received are insufficient or unavailable to the State Bar.

REPORTING REQUIREMENTS

Grantees must report quantitative and qualitative data describing their clients and activities. This data will include case outcomes tied to individual characteristics.

The 2023–2024 CARE Court grants may use the existing framework for Equal Access Program reporting except where necessary to meet other state requirements. Reporting requirements are subject to guidance from the Department of Finance and other agencies. As such, some requirements might become known to the State Bar at a later date.

The committee will finalize the 2023–2024 reporting requirements by September 2023. Requirements are likely to include:

1. **Quarterly expenditure reports**

Grantees may have to submit quarterly spending reports that compare expenditures to the approved budget. Grantees will have to report budget variances exceeding 10 percent of the award to the State Bar as soon as possible. Budget variances exceeding 10 percent of the award require an official budget revision request and State Bar or LSTFC approval.

2. **Quarterly services reports**

Grantees may have to submit quarterly reports with client-level data on:

- A. Case outcomes, such as select main benefits in the *California Legal Aid Reporting Handbook*, that are relevant to representing respondents in CARE Court. Grantees may need to specify whether the outcome is verified.
- B. Geographic and other demographic data, tied to verified/unverified outcomes, for all clients.
- C. The nature and length of services for all cases where there was an attorney-client relationship and aggregated data about all other services (e.g. trainings) during the grant.
- D. (To the extent possible) Economic benefits for cases that resulted in an award for or savings to the client.
- E. (For QLSPs) The time it takes to represent respondents in CARE Court and related information (e.g., number of hearings and hearing type).
- F. (For support centers) Quantitative and qualitative data about trainings, convenings, research, and other support for QLSPs, courts, county behavioral health agencies, and others.
- G. Any other quarterly data necessary to comply with state reporting requirements.

3. **A final evaluation**

Grantees may have to submit a final evaluation about outputs and outcomes such as:

- A. Community impact: How this project affected the people it served.
- B. Evaluation/Assessment: The processes used to assess the effectiveness of this project and lessons learned about the project itself or the community it served.
- C. Reports: Reports about the evaluation or assessment of this project or

demonstrating the effect of its services (e.g., client satisfaction surveys, pre- and post-test results, number of trials, outcome of trials, etc.).

- D. Publications: Any publication or distribution plans for materials resulting from grant activities.
- E. Any other final evaluation data necessary to comply with state reporting requirements

FOR QUESTIONS

For questions about the 2023–2024 CARE Court grants, please contact Christopher McConkey, Program Supervisor, at (213) 765-1505 or christopher.mcconkey@calbar.ca.gov.

Attachment A4. IOLTA-Formula Equal Access Fund Grant Recipients for 2023

#	Organization	EAF-IOLTA Amount
1	Advancing Justice - Asian Law Caucus	\$ 355,061
2	Affordable Housing Advocates	\$ 10,920
3	Aids Legal Referral Panel	\$ 23,013
4	Alameda County Homeless Action Center	\$ 153,710
5	Alliance for Children's Rights	\$ 455,260
6	Asian Americans Advancing Justice Southern California	\$ 422,836
7	Asian Pacific Islander Legal Outreach	\$ 154,290
8	Bay Area Legal Aid	\$ 418,427
9	Bet Tzedek Legal Services	\$ 1,031,120
10	California Advocates for Nursing Home Reform	\$ 225,046
11	California Indian Legal Services	\$ 197,207
12	California Rural Legal Assistance Foundation	\$ 225,046
13	California Rural Legal Assistance, Inc.	\$ 2,318,060
14	California Women's Law Center	\$ 225,046
15	Capital Pro Bono Inc.	\$ 109,914
16	Casa Cornelia Law Center	\$ 295,660
17	Center for Gender and Refugee Studies - California	\$ 225,046
18	Center for Human Rights and Constitutional Law	\$ 225,046
19	Central California Legal Services	\$ 1,110,870
20	Centro Legal de la Raza	\$ 215,286
21	Child Care Law Center	\$ 225,046
22	Coalition of California Welfare Rights Organizations	\$ 225,046
23	Community Lawyers Inc.	\$ 10,460
24	Community Legal Aid SoCal	\$ 918,927
25	Community Legal Services in East Palo Alto	\$ 194,910
26	Contra Costa Senior Legal Services	\$ 40,270
27	Dependency Advocacy Center	\$ 85,840
28	Disability Rights California	\$ 2,973,875
29	Disability Rights Education and Defense Fund	\$ 225,046
30	Disability Rights Legal Center	\$ 162,447
31	East Bay Community Law Center	\$ 144,840
32	Elder Law & Advocacy	\$ 143,960
33	Eviction Defense Collaborative	\$ 58,750
34	Family Violence Appellate Project	\$ 225,046
35	Family Violence Law Center	\$ 26,180
36	Greater Bakersfield Legal Assistance	\$ 552,400
37	Harriett Buhai Center for Family Law	\$ 173,010
38	Housing and Economic Rights Advocates	\$ 100,442
39	IEP Collaborative, Inc.*	\$ 1,660
40	Immigrant Legal Resource Center	\$ 225,046
41	Impact Fund	\$ 225,046

42	Inland Counties Legal Services	\$ 1,728,180
43	Inland Empire Latino Lawyers Association, Inc.	\$ 120,900
44	Inner City Law Center	\$ 862,030
45	Justice & Diversity Center of the Bar Association of San Francisco	\$ 117,230
46	Justice in Aging	\$ 225,046
47	La Raza Centro Legal	\$ 17,960
48	LACBA Counsel for Justice	\$ 83,020
49	Law Foundation of Silicon Valley	\$ 284,300
50	Lawyers' Committee for Civil Rights	\$ 310,703
51	Learning Rights Law Center	\$ 179,847
52	Legal Access Alameda	\$ 55,250
53	Legal Aid at Work	\$ 423,548
54	Legal Aid Foundation of Los Angeles	\$ 1,006,130
55	Legal Aid Foundation of Santa Barbara County	\$ 131,700
56	Legal Aid of Marin	\$ 57,990
57	Legal Aid of Sonoma County	\$ 164,000
58	Legal Aid Society of San Bernardino	\$ 345,800
59	Legal Aid Society of San Diego	\$ 822,990
60	Legal Aid Society of San Mateo County	\$ 99,450
61	Legal Assistance for Seniors	\$ 36,650
62	Legal Assistance to the Elderly	\$ 34,760
63	Legal Services for Children	\$ 53,785
64	Legal Services for Prisoners with Children	\$ 225,046
65	Legal Services for Seniors	\$ 93,940
66	Legal Services of Northern California	\$ 1,195,739
67	Los Angeles Center for Law and Justice	\$ 142,160
68	Loyola Marymount University	\$ 285,440
69	McGeorge Community Legal Services	\$ 100,045
70	Mental Health Advocacy Services	\$ 104,620
71	National Center for Youth Law	\$ 225,046
72	National Health Law Program	\$ 225,046
73	National Housing Law Project	\$ 225,046
74	Neighborhood Legal Services	\$ 990,140
75	OneJustice	\$ 225,046
76	Open Door Legal	\$ 36,730
77	Prison Law Office	\$ 324,936
78	Public Advocates Inc.	\$ 334,563
79	Public Counsel	\$ 1,137,510
80	Public Interest Law Project	\$ 225,046
81	Public Law Center	\$ 624,902
82	Riverside Legal Aid	\$ 243,900
83	San Diego Volunteer Lawyer Program	\$ 235,440
84	San Joaquin College of Law	\$ 49,710
85	San Luis Obispo Legal Assistance Foundation	\$ 45,130

86	Santa Clara County Asian Law Alliance	\$	62,300
87	Santa Clara University Alexander Law Center	\$	29,120
88	Senior Adults Legal Assistance	\$	24,960
89	Senior Advocacy Network	\$	57,960
90	Senior Citizens Legal Services	\$	30,230
91	Social Justice Collaborative	\$	116,351
92	UC Davis School of Law Legal Clinics	\$	188,348
93	UnCommon Law	\$	286,080
94	USD School of Law Legal Clinics	\$	122,850
95	Veterans Legal Institute	\$	108,433
96	Wage Justice Center	\$	21,210
97	Watsonville Law Center	\$	89,200
98	Western Center on Law and Poverty	\$	225,046
99	Worksafe, Inc.	\$	225,046
100	Youth Law Center	\$	225,046
101	Yuba-Sutter Legal Center for Seniors	\$	22,830
TOTAL		\$	31,626,571

*IEP Collaborative notified the State Bar that it was closing operations and has since returned its 2023 EAF-IOLTA grant.

Attachment A5. 2023 Partnership Grant Recipients

Organization	Project Title	Partnership Grant Award
Bet Tzedek Legal Services	Remote Pro Se Technology Initiative	\$ 120,000
Bet Tzedek Legal Services	Decedent Estate Self-Help Clinic	\$ 150,000
California Rural Legal Assistance, Inc.	San Joaquin County Housing Helpline Court Clinic Partnership	\$ 132,000
Central California Legal Services	Guardianship Project	\$ 70,000
Community Legal Aid SoCal	Compton Self-Help Economic Expansion Project Year 2	\$ 91,000
Community Legal Aid SoCal	Orange County Consumer Debt Series	\$ 69,000
Community Legal Aid SoCal	Norwalk Consumer Debt Series	\$ 34,000
Elder Law & Advocacy	Imperial County Elder Abuse Technology Project	\$ 105,000
Family Violence Law Center	Domestic Violence Pro Per (DVPP) Project	\$ 25,000
Inland Counties Legal Services	Consumer Rights Clinic EXPANSION	\$ 151,000
Justice & Diversity Center of the Bar Association of San Francisco	FLASH	\$ 70,000
LACBA Counsel for Justice	Domestic Violence Legal Services Project (DVP)	\$ 104,000
Legal Access Alameda	Family Law Day of Court	\$ 25,000
Legal Access Alameda	Family Law Status Conference Clinic	\$ 65,000
Legal Aid Foundation of Los Angeles	2023 - Torrance Self Help Partnership Grant	\$ 100,000
Legal Aid Foundation of Santa Barbara County	LRC Partnership	\$ 138,000
Legal Aid of Marin	Homelessness Prevention Through Mandatory Settlement Conferences	\$ 80,000
Legal Aid Society of San Bernardino	CSEAJ - PROBATE PARTNERSHIP 2023	\$ 159,000
Legal Aid Society of San Diego	Name Change & Gender Change Self-Help Clinic	\$ 85,000
Legal Aid Society of San Diego	South Bay Restraining Order Project	\$ 120,000
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	\$ 55,000
Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	\$ 50,000
Legal Services of Northern California	Yolo Consumer Clinic	\$ 39,000
Neighborhood Legal Services	San Gabriel Valley - Remote Services - Housing	\$ 124,000
Neighborhood Legal Services	POMONA - READY FOR TRIAL!	\$ 120,000
Neighborhood Legal Services	STABILIZING FAMILIES PROJECT	\$ 105,000
Neighborhood Legal Services	PASADENA - CONTINUUM OF SERVICES	\$ 115,000
Public Law Center	DeFacto & Adoptive Parent Assistance Project	\$ 50,000
San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	\$ 130,000
Senior Citizens Legal Services	Indigent Landlord/Tenant Services and Mediation	\$ 105,000
	TOTAL	\$ 2,786,000

Attachment A6. Partnership Grant 2.0 Recipients

Organization	Project Title	Type	Partnership Grant Award
Legal Access Alameda	Family Law Settlement Conference	PG 2.0 Supplemental	\$ 4,000
Family Violence Law Center	Domestic Violence Pro Per (DVPP) Project	PG 2.0 Supplemental	\$ 4,000
Legal Access Alameda	Family Law Day of Court	PG 2.0 Supplemental	\$ 5,000
Inland Counties Legal Services	Consumer Rights Clinic	PG 2.0 Supplemental	\$ 7,000
California Rural Legal Assistance, Inc.	San Joaquin Housing Helpline Court Clinic Partnership (Supplemental)	PG 2.0 Supplemental	\$ 17,000
LACBA Counsel for Justice	LACBA Domestic Violence Legal Services Project (Supplemental)	PG 2.0 Supplemental	\$ 19,000
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	PG 2.0 Supplemental	\$ 19,000
Central California Legal Services	Guardianship Project	PG 2.0 Supplemental	\$ 24,000
Bet Tzedek Legal Services	Remote Pro Se Technology Initiative	PG 2.0 Supplemental	\$ 30,000
San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	PG 2.0 Supplemental	\$ 37,000
Riverside Legal Aid	Supp SEAP 2022	PG 2.0 Supplemental	\$ 40,000
Legal Aid Society of San Bernardino	Domestic Violence and Homeless Prevention	PG 2.0 New	\$ 264,790
Public Counsel	Guardianship Clinic Expansion	PG 2.0 New	\$ 300,000
Legal Aid Foundation of Los Angeles	LAFLA Self Help Remote Technology Access Project - New	PG 2.0 New	\$ 300,000
Senior Citizens Legal Services	Expanded Indigent Landlord/Tenant Services and Mediation	PG 2.0 New	\$ 101,868
Neighborhood Legal Services	A2J: Navigating a Remote World	PG 2.0 New	\$ 255,000
Neighborhood Legal Services	Bridge to Self-Help (BSH)	PG 2.0 New	\$ 300,000
Community Legal Aid SoCal	LA County SHLAC Hybrid Bridge project	PG 2.0 New	\$ 194,491
Mental Health Advocacy Services	Mental Health Court Clinic	PG 2.0 New	\$ 300,000
Bet Tzedek Legal Services	Post-Hearing Virtual Services Project	PG 2.0 New	\$ 255,000
Inland Counties Legal Services	Family Law Access Partnership (FLAP)	PG 2.0 New	\$ 211,088
Public Counsel	Appellate Clinic Expansion	PG 2.0 New	\$ 197,000
Neighborhood Legal Services	International Service - Hague Remote Self-Help	PG 2.0 New	\$ 255,000
LACBA Counsel for Justice	DVRO Remote Access Project	PG 2.0 New	\$ 300,000
Legal Aid of Marin	Community Court Expansion	PG 2.0 New	\$ 140,000
Legal Aid Society of San Diego	East County Restraining Order Clinic	PG 2.0 New	\$ 300,000
TOTAL			\$ 3,880,237

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,” with the period from the Start Date to the End Date known as 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

Program Name and Number: «ProgramNumber»

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. These Directives include, but are not limited to, Equal Access Fund reporting requirements related to funding allocations, annual expenditures, program outcomes by service area, and a final evaluation report for the period of January 1 - December 31, pursuant to instructions and deadlines to be provided by the State Bar.

4. Recipient represents and warrants that its governing board, the officers, executive director, and similarly empowered staff have read and understand this Agreement, the Act, Rules, Application Materials, Eligibility Guidelines, and Grant Provisions. Recipient has familiarized appropriate staff with the requirements of this Agreement, 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 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 days after the State Bar sends written notice of termination to Recipient.
- 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 the 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 within five (5) business days after 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 within five (5) business days of any material change in the planned activities or proposed budget contained in the Application Materials or any revision thereto.
- 11. Recipient will not make any misrepresentations or misstatements of fact in any communications or report to the State Bar. In the event Recipient later discovers that any statement made to the State Bar is no longer true, Recipient will notify the State Bar within five (5) business days after discovering that the statement is no longer true. This obligation of Recipient shall survive the termination of the Agreement and/or the expiration of the Grant Period.
- 12. Recipient will notify the State Bar within five (5) business days of Recipient's awareness of any of the following events: (1) a decision to change Recipient's name, merge or consolidate with another entity, cease operations, or cease the activities funded by the Grant; (2) a decision to close or relocate any main or branch office; (3) significant management changes, including the departure of and/or hiring or appointment of the executive director or board chairperson; (4) Recipient becomes insolvent or is in danger of becoming insolvent within three months; (5) a monetary judgment, settlement, sanction, penalty, or force majeure event that will substantially impact Recipient's delivery of legal services; (6) Recipient or any of Recipient's officials (e.g., officers and executive team members) or employees with control over finances or financial management responsibilities is investigated for or charged with fraud, misappropriation, embezzlement, theft, or any similar offense, or are suspended, disciplined, or delicensed by a bar or other professional licensing organization; (7) Recipient is investigated or audited by the Legal Services Corporation or any other provider of funds to Recipient. This obligation of Recipient shall survive the termination of the Agreement and/or the expiration of the Grant Period.

Program Name and Number: «ProgramNumber»

13. 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 LawHelpCA.org;
 - ii. Legal Services Directories (support center and field program directories); and
 - iii. *Pro Bono* Programs Guide on CaliforniaProBono.org;
 - b) Include information about LawHelpCA.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 CALegalAdvocates.org website, and must encourage participation in brief trainings about the websites as available; and
 - c) Provide a link to LawHelpCA.org on its own program's website.
14. Recipient will permit the State Bar's personnel, independent contractors or agents ("Personnel") to inspect at any time any records and/or 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 and premises for purposes of compliance will survive the expiration of the Grant Period and/or any termination of this Agreement. In complying with disclosure requirements of this Agreement and of the Program and Fund, Recipient may withhold 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.
15. 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 14 above.
16. 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.
17. 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 and Judicial Council a non-exclusive, transferable, perpetual, irrevocable, royalty-free, paid-up, worldwide right and license to use, re-use, display,

Program Name and Number: «ProgramNumber»

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 and Judicial Council to publish the Grant Work Product on the State Bar's and/or Judicial Council's websites, and for use in periodic reports, press releases, meetings, and fact sheets. Recipient further acknowledges and agrees, at the State Bar's and/or Judicial Council's request, to execute any additional documents necessary to effect such license.

18. 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 18. This indemnity provision shall survive the termination or expiration of this Agreement.
19. 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.
20. 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 Director
Office of Access & Inclusion
doan.nguyen@calbar.ca.gov

Recipient: «ProgramLegalName»
«Address1» «Address2»

Program Name and Number: «ProgramNumber»

«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.

21. 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.
22. 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.
23. 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.
24. 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.
25. 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.
26. 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.
27. 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.
28. 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

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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:

By:

Print Name of Executive Director

 Print Title of State Bar Executive
 Officer

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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Attachment A8. Eligible 2024 IOLTA-EAF Grantees*As approved by the Legal Services Trust Fund Commission on August 10, 2023*

Organization	Acronym	Grantee Type
Advancing Justice - Asian Law Caucus	AJ-ALC	IOLTA/EAF LSP
Affordable Housing Advocates	AHA	IOLTA/EAF LSP
Aids Legal Referral Panel	ALRP	IOLTA/EAF LSP
Al Otro Lado, Inc.	AOL	IOLTA/EAF LSP
Alameda County Homeless Action Center	HAC	IOLTA/EAF LSP
Alliance for Children's Rights	Alliance	IOLTA/EAF LSP
Asian Americans Advancing Justice Southern California	AAAJ-LA	IOLTA/EAF LSP
Asian Pacific Islander Legal Outreach	APILO	IOLTA/EAF LSP
Bay Area Legal Aid	BayLegal	IOLTA/EAF LSP
Bet Tzedek Legal Services	BetTzedek	IOLTA/EAF LSP
California Advocates for Nursing Home Reform	CANHR	IOLTA/EAF SC
California Collaborative for Immigrant Justice	-	IOLTA/EAF LSP
California Indian Legal Services	CILS	IOLTA/EAF LSP
California Rural Legal Assistance Foundation	CRLAF	IOLTA/EAF SC
California Rural Legal Assistance, Inc.	CRLA	IOLTA/EAF LSP
California Women's Law Center	CWLC	IOLTA/EAF SC
Capital Pro Bono Inc.	CPB	IOLTA/EAF LSP
Casa Cornelia Law Center	CasaCornelia	IOLTA/EAF LSP
Center for Gender and Refugee Studies - California	CGRS-CA	IOLTA/EAF SC
Center for Human Rights and Constitutional Law	CHRCL	IOLTA/EAF SC
Center for Immigrant Protection dba The LGBT Asylum Project	CIP	IOLTA/EAF LSP
Center for Workers' Rights	CWR	IOLTA/EAF LSP
Central California Legal Services	CCLS	IOLTA/EAF LSP
Centro Legal de la Raza	CentroLegal	IOLTA/EAF LSP
Child Care Law Center	CCLC	IOLTA/EAF SC
Coalition of California Welfare Rights Organizations	CCWRO	IOLTA/EAF SC
Community Lawyers Inc.	CLI	IOLTA/EAF LSP
Community Legal Aid SoCal	CLASC	IOLTA/EAF LSP
Community Legal Services in East Palo Alto	CLSEPA	IOLTA/EAF LSP
Contra Costa Senior Legal Services	CCSenior	IOLTA/EAF LSP
Dependency Advocacy Center	DAC	IOLTA/EAF LSP
Disability Rights California	DRC	IOLTA/EAF LSP
Disability Rights Education and Defense Fund	DREDF	IOLTA/EAF SC
Disability Rights Legal Center	DRLC	IOLTA/EAF LSP
East Bay Community Law Center	EBCLC	IOLTA/EAF LSP
Elder Law & Advocacy	ELA	IOLTA/EAF LSP
Elder Law and Disability Rights Center	-	IOLTA/EAF LSP
Eviction Defense Collaborative	EDC	IOLTA/EAF LSP
Family Violence Appellate Project	FVAP	IOLTA/EAF SC
Family Violence Law Center	FVLC	IOLTA/EAF LSP
Greater Bakersfield Legal Assistance	GBLA	IOLTA/EAF LSP
Harriett Buhai Center for Family Law	HarriettBuhai	IOLTA/EAF LSP
Housing and Economic Rights Advocates	HERA	IOLTA/EAF LSP
Immigrant Defenders Law Center	-	IOLTA/EAF LSP
Immigrant Legal Defense	ILD	IOLTA/EAF LSP
Immigrant Legal Resource Center	ILRC	IOLTA/EAF SC

Attachment A8. Eligible 2024 IOLTA-EAF Grantees*As approved by the Legal Services Trust Fund Commission on August 10, 2023*

Organization	Acronym	Grantee Type
Impact Fund	ImpactFund	IOLTA/EAF SC
Inland Counties Legal Services	ICLS	IOLTA/EAF LSP
Inland Empire Latino Lawyers Association, Inc.	IELLA	IOLTA/EAF LSP
Inner City Law Center	ICLC	IOLTA/EAF LSP
Justice & Diversity Center of the Bar Association of San Francisco	JDC	IOLTA/EAF LSP
Justice in Aging	JIA	IOLTA/EAF SC
La Raza Centro Legal	LaRaza	IOLTA/EAF LSP
LACBA Counsel for Justice	LACBA	IOLTA/EAF LSP
Law Foundation of Silicon Valley	LFSV	IOLTA/EAF LSP
Lawyers' Committee for Civil Rights	LCCR	IOLTA/EAF LSP
Learning Rights Law Center	LRLC	IOLTA/EAF LSP
Legal Access Alameda	LAA	IOLTA/EAF LSP
Legal Aid at Work	LAAW	IOLTA/EAF LSP
Legal Aid Foundation of Los Angeles	LAFLA	IOLTA/EAF LSP
Legal Aid Foundation of Santa Barbara County	LAFSBC	IOLTA/EAF LSP
Legal Aid of Marin	LAM	IOLTA/EAF LSP
Legal Aid of Sonoma County	LASC	IOLTA/EAF LSP
Legal Aid Society of San Bernardino	LASSB	IOLTA/EAF LSP
Legal Aid Society of San Diego	LASSD	IOLTA/EAF LSP
Legal Aid Society of San Mateo County	LASSMC	IOLTA/EAF LSP
Legal Assistance for Seniors	LAS	IOLTA/EAF LSP
Legal Assistance to the Elderly	LAE	IOLTA/EAF LSP
Legal Services for Children	LSC	IOLTA/EAF LSP
Legal Services for Prisoners with Children	LSPC	IOLTA/EAF SC
Legal Services for Seniors	LSS	IOLTA/EAF LSP
Legal Services of Northern California	LSNC	IOLTA/EAF LSP
Los Angeles Center for Law and Justice	LACLJ	IOLTA/EAF LSP
Loyola Marymount University	LMU	IOLTA/EAF LSP
McGeorge Community Legal Services	McGeorge	IOLTA/EAF LSP
Mental Health Advocacy Services	MHAS	IOLTA/EAF LSP
National Center for Youth Law	NCYL	IOLTA/EAF SC
National Health Law Program	NHLP	IOLTA/EAF SC
National Housing Law Project	NationalHousing	IOLTA/EAF SC
Neighborhood Legal Services	NLS	IOLTA/EAF LSP
OneJustice	OneJustice	IOLTA/EAF SC
Open Door Legal	ODL	IOLTA/EAF LSP
Prison Law Office	PLO	IOLTA/EAF LSP
Public Advocates Inc.	PublicAdvocates	IOLTA/EAF LSP
Public Counsel	PublicCounsel	IOLTA/EAF LSP
Public Interest Law Project	PILP	IOLTA/EAF SC
Public Law Center	PLC	IOLTA/EAF LSP
Q.Me Place, Inc.	QME	IOLTA/EAF LSP
Riverside Legal Aid	RLA	IOLTA/EAF LSP
San Diego Volunteer Lawyer Program	SDVLP	IOLTA/EAF LSP
San Joaquin College of Law	SJCL	IOLTA/EAF LSP
San Luis Obispo Legal Assistance Foundation	SLOLAF	IOLTA/EAF LSP

Attachment A8. Eligible 2024 IOLTA-EAF Grantees*As approved by the Legal Services Trust Fund Commission on August 10, 2023*

Organization	Acronym	Grantee Type
Santa Barbara County Immigrant Legal Defense Center	SBILDC	IOLTA/EAF LSP
Santa Clara County Asian Law Alliance	SCALA	IOLTA/EAF LSP
Santa Clara University Alexander Law Center	KGALC	IOLTA/EAF LSP
Senior Adults Legal Assistance	SALA	IOLTA/EAF LSP
Senior Advocacy Network	SAN	IOLTA/EAF LSP
Senior Citizens Legal Services	SCLS	IOLTA/EAF LSP
Social Justice Collaborative	SJC	IOLTA/EAF LSP
Southern California Immigration Project	SCIP	IOLTA/EAF LSP
UC Davis School of Law Legal Clinics	UCDavis	IOLTA/EAF LSP
UnCommon Law	UCLAW	IOLTA/EAF LSP
USD School of Law Legal Clinics	USD	IOLTA/EAF LSP
Veterans Legal Institute	VLI	IOLTA/EAF LSP
Wage Justice Center	WageJustice	IOLTA/EAF LSP
Watsonville Law Center	Watsonville	IOLTA/EAF LSP
Western Center on Law and Poverty	WCLP	IOLTA/EAF SC
Worksafe, Inc.	Worksafe	IOLTA/EAF SC
Youth Law Center	YLC	IOLTA/EAF SC
Yuba-Sutter Legal Center for Seniors	Yuba-Sutter	IOLTA/EAF LSP



The State Bar of California

OFFICE OF ACCESS & INCLUSION

2024 PARTNERSHIP GRANTS REQUEST FOR PROPOSALS

This document provides information for organizations interested in submitting proposals for Partnership Grants. Organizations should review this document to ensure that the proposed projects are eligible for this funding, and that their proposals describe those activities in a manner that best addresses the principal concerns of the funding authorities.

Partnership Grants are competitive and discretionary. Project proposals must be submitted on SmartSimple by **5:00 p.m. on Friday, March 17, 2023**.

If you have any questions, please contact Christal Bundang at christal.bundang@calbar.ca.gov.

BACKGROUND

The State Budget Act establishes the Equal Access Fund “to improve equal access and the fair administration of justice.” The Equal Access Fund is allocated to the Judicial Council and administered by the State Bar of California, through its Legal Services Trust Fund Commission (Commission). Ten percent of the Equal Access Fund is reserved for “joint projects of courts and legal services programs to make legal assistance available to pro per litigants.”

Partnership Grants are awarded through a competitive process. The Commission reviews and compares all eligible proposals and makes funding recommendations to the Judicial Council. Grants are awarded for a one-year period commencing January 1. Decisions of the Commission, as approved by the Judicial Council, are final; there is no appeals process. Due to the limited availability of funding, grant award allocations vary, and all proposals may not be funded. For the 2023 grant year, 30 eligible projects were funded in a range from \$25,000 to \$159,000 for a total of \$2.79 million.

Consideration will also be given to ensure that this funding supports projects serving a diverse range of geographic areas, substantive issues, and client constituencies. Projects seeking funding beyond five consecutive years will be more closely reviewed by the Commission in terms of overall project strength and other selection criteria.

At the conclusion of each grant year, grantees must submit a comprehensive report and evaluation on the use and impact of these funds, and continuing projects must describe their plans for obtaining funding from other sources to support these projects after the termination of Partnership Grant support.

2024 PARTNERSHIP GRANTS SCORING RUBRIC

In an effort to provide transparency and equity in the review process, the Partnership Grants Committee will use a scoring rubric as a tool to help guide review of all eligible proposals.

The rubric is comprised of four sections - Eligibility Requirements, Selection Criteria, Funding Priorities, and Innovation. Initial rubric scores will be shared with applicants, who will have an opportunity to improve their scores, by providing additional information or addressing initial concerns. For projects applying for continued funding, the Commission may also consider an applicant's past performance when scoring relevant rubric sections such as Project Impact and Evaluation. The Commission maintains discretion when determining funding recommendations.

Eligibility Requirements

This section is not weighted. Applicants must meet the following criteria to be eligible to submit a proposal:

- **Qualified Legal Services Projects (QLSPs):** Pursuant to Business & Professions Code 6210 et seq., only QLSPs are eligible to apply for Partnership Grants.
- **Joint Court/Qualified Legal Services Projects:** Proposals must be for projects jointly developed and implemented by California State courts and QLSPs.
- **Indigent Persons:** Use of Partnership Grant funds is restricted to the provision of services to indigent persons as defined under Business and Professions Code §6213(d).
- **Self-Represented Civil Litigants:** Partnership Grant funding is restricted to providing assistance to individuals who are or expect to be engaged in civil litigation without representation by counsel. These funds cannot be used to make court appearances on behalf of litigants.

If the proposed project will be serving non-indigent persons or if individuals will be engaged in civil litigation, the project must identify non-Partnership Grant funds that will be used to cover this work.

Selection Criteria (85 points)

Based on responses provided in the proposal, the Committee will score each sub-section as "Exceeds Expectations," "Meets Expectations," or "Below Expectations" with corresponding multipliers for a maximum of 80 points.

Generally, responses that provide relevant and detailed information, such as metrics or specific examples would be scored favorably. Responses that do not appear responsive to the selection criteria's description may be considered "below requirements."

Funding Priorities (15 points)

The Commission will exercise its discretion and score the project 1-3 based on funding priorities. That number will be multiplied by 5 for a maximum section score of 15 points.

In making decisions regarding funding priorities, the Commission will consider factors that include, but are not limited to:

- Whether the project is new. A goal of Partnership Grant funding is to provide support for effect projects, which may be renewed for an initial five-year period. The Commission maintains discretion to determine what is considered a new project, and may consider factors, that include, but are not limited to, whether the project was previously or currently funded or proposes a substantial change to an existing service delivery model.
- Whether the project supports unmet rural needs, even if operating beyond a fifth year.

Optional – Innovation (up to 5 points)

The Commission encourages innovative projects and may award up to 5 bonus points for innovation.

Examples of innovation may include:

- Projects that involve courts that have not had projects in a long time
- Projects with models that were tried/successful in other jurisdictions, but are new to the court
- Initial projects in a case type (first consumer program, first conservatorship program, etc.)
- Projects testing new ways of providing services.

ELIGIBILITY REQUIREMENTS			
Please select “yes” or “no” for each requirement.			
Applicant is a Qualified Legal Services Project	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
Proposal is jointly developed and implemented by a California State court.	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
Proposed services will be provided only to indigent persons, as defined under Business and Profession Code §6213(d).	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
If NO, has the project identified non-Partnership Grant funds that will cover this work?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> N/A
Proposed services will be provided only to self-represented litigants (individuals who are or expect to be engaged in civil litigation without representation by counsel).	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
If NO, has the project identified non-Partnership Grant funds that will cover this work?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> N/A

DEFINITIONS	
Exceeds Expectations	Response is very high quality, addressing all questions in the request for proposal and all elements of the selection criteria. The identified strengths in the category are substantial with no or minimal weaknesses or additional questions identified. Any identified weakness has minimal effect on the overall quality of the response.
Meets Expectations	Response is good, effectively addressing most questions in the request for proposal and the selection criteria. Strengths and weaknesses are identified that may balance each other in significance. Overall quality of response is satisfactory
Below Expectations	Response is weak, neglecting to address questions in the request for proposal and the elements of the criteria. The responses Identified weaknesses hold significant weight, overshadowing the identified strengths. Overall quality of response is inadequate, with significant flaws in key elements.

SELECTION CRITERIA (85 PTS)			
Checkmark the appropriate ranking for each category, and then multiply by the number below. Add sub-scores from A and B to get the total points for this section.			
CATEGORY & DESCRIPTION	Exceeds Expectations	Meets Expectations	Below Expectations
<u>Court Involvement</u> A successful proposal will indicate: <ul style="list-style-type: none"> significant cooperation between the partner court and legal services organization, integration with other court-based services and if the project's services are to be reserved for only one litigant role, such as petitioners but not respondents, that this has been thoroughly explored with the court, and alternate legal resources that can provide meaningful if not equivalent levels of assistance to the opposing parties have been identified. 			
<u>Project Impact</u> A successful proposal will clearly describe the needs of the targeted population and how anticipated outcomes and related budget of the proposed activity(ies) will have a meaningful impact on this population. Outcomes may include the number of people served, nature of the impact, and other project deliverables that will be achieved with this grant funding during the grant period.			
A. Number of Check Marks	X20=	X15=	X10=
Subtotal (A)			
<u>Administration</u> A successful proposal will demonstrate the ability and capacity to implement and manage the			

proposed activity(ies). Strong administration includes adequate staffing, leadership, and oversight of project monitoring, outreach, and resource development. An applicant's historical demonstration of its ability to meet goals from prior grants and timely reporting of results/outcomes will also be considered under this category.			
<u>Continuity Planning</u> A successful proposal will address whether its proposed services can continue with funds other than those provided by Partnership Grants and provide details of past efforts and future plans to secure such alternate funding.			
<u>Evaluation</u> A successful proposal will incorporate meaningful evaluation plans and metrics that effectively demonstrate whether and how the project's planned goals are being achieved. This may include a clear statement of the project goals, strategies to be used to achieve those goals, evaluation methods to be used to make any mid-course adjustments to the delivery model, and evaluation methods to gauge the success of the project. Returning organizations applying for the same funding opportunity will also need to address prior evaluation outcomes and metrics.			
B. Number of Check Marks	X15=	X10=	X5=
Subtotal (B)			
Selection Criteria Total (A+B)			

FUNDING PRIORITIES (15 PTS)

Keeping the funding priorities in mind, determine the number points you wish to score this project and then multiply by the number below.

<p>In making decisions regarding funding priorities, the commission will consider factors that include, but are not limited to:</p> <ul style="list-style-type: none"> Whether the project is new. A goal of Partnership Grant funding is to provide support for effective projects, which may be renewed for an initial five-year period. The commission maintains discretion to determine what is considered a new project, and may consider factors, that include, but are not limited to, whether the project was previously or currently funded or proposes a substantial change to an existing service delivery model. Whether the project supports unmet rural needs, even if operating beyond a fifth year of funding. 	3 2 1
Funding Priority Total Score	X5 =

OPTIONAL - INNOVATION (up to 5 PTS)

The Committee may exercise discretion in awarding points for innovation. Based on your review of the proposal, determine if wish to score additional points for innovation and provide your reason(s) below.

Additional points will be awarded to successful proposals that demonstrate innovation.	YES	NO
Bonus Points Awarded (1-5 pts)		
Reason(s) for awarding bonus points for innovation:		

OTHER POLICIES REGARDING ADMINISTRATION OF PARTNERSHIP GRANTS

The Commission has made policy determinations with regard to certain substantive issues that have arisen repeatedly, as guidance for applicants seeking to strengthen their proposals, and to help ensure the consistency of its own deliberations and recommendations regarding Partnership Grants. The following statements of Partnership Grants policies were each approved by the Commission, on the dates indicated in parentheses after their titles:

Self-Representation and Attorney-Client Relationships (July 2017)

Self-represented litigants receiving services under a Partnership Grant are not prohibited from forming a confidential relationship with a lawyer, so long as they remain unrepresented when they appear in court. While we [the Commission] will ultimately defer to the court's own determination as to whether the litigant is self-represented, factors impacting this determination include where any attorney's participation takes place, and whether the attorney's name appears on pleadings or in the records of proceedings in court. So long as no appearance is made on the record and no representational activity occurs in court, formation of an attorney-client relationship in and of itself is not inconsistent with the "self-represented" status of a litigant.

Overhead, Administration, and Audit (August 2018)

Partnership Grant funds should pay for actual project expenses or directly related costs – to fund the project, but not the organization. Some programs have used individual line items to identify administrative costs. Others use an Allocated Cost Ratio, which is often based on a standardized formula; however, it is sometimes unclear how a formula-based allocation relates to the proposed activities.

- Some non-personnel costs which may be appropriately tied to the project include malpractice insurance and attorney licensing fees.
- As Partnership Grant-funded services should typically be performed primarily at or near the courthouse, which reduces the need for program space and equipment, costs allocated to these lines should be clearly justified in the budget narrative.
- Programs using formula-based allocated cost ratios must clearly explain what these comprise and how they are calculated, for purposes of Partnership grant budgeting.

Use of Partnership Funding as a Sub-grant Covering Wages of Court Staff (August 2018)

An organization receiving Partnership Grant funding is expected to be the primary service provider under that grant. However, greater efficiencies can sometimes be attained by sub-granting some of that funding to a court partner. The following considerations have been identified as relevant in determining whether to approve discretionary funding for such a request:

- The contract governing the relationship between the grant recipient organization and the court must clearly specify that grant-funded court staff will only work on project activities, not on other duties that might be assigned by the court.
- The contracted staff must follow the Guidelines for the Operation of Self-Help Centers, with particular regard to ensuring the court's neutrality as to the fact that services are being provided, the manner in which they are provided, and the persons to whom they are provided.
- The services funded would not otherwise be provided by the court, but for the Partnership Grant. The Partnership Grant shall not supplant existing funding or services.
- The project budget must include additional funding sufficient to assist litigants who do not qualify to be served with Partnership Grant funding.
- In these and all cases, the court must participate in providing feedback and in developing evaluative data. Where funding is sub-granted to the court partner for payment of court staff, this evaluative data will include information on the number of litigants using the service who do not meet the definition of "indigent" found at Business & Professions Code §6213.

Funding of Supervised Settlement Services through Partnership Grants (July 2019)

Partnership Grants may be used to support supervised settlement services to assist litigants in settling their litigation, so long as the settlement services are a component of court-based litigation and are overseen by an attorney.

Attachment A10. Recommended 2024 Partnership Grant Recipients

As recommended by the Partnership Grants Committee on July 19, 2023 and approved by the Legal Services Trust Fund Commission on August 10, 2023

Organization	Project Name	County	Project Abstract	Amount Requested	Recommended Grant Award
Alliance for Children's Rights	Permanency Benefits Clinic Court Partnership	Los Angeles,	<p>Public benefits for families impacted by foster care is a critical part of the stability and even viability of foster placements, especially those with relative and non-related extended family member (NREFM) caregivers. Yet, funding eligibility and rates are complex, opaque, and easily misunderstood.</p> <p>To address this need, and in partnership with the Edmund D. Edelman Children's Courthouse in Monterey Park, the Alliance proposes to create a Permanency Benefits Clinic to provide access to critical information for self-represented caregivers seeking adoption or legal guardianship of the children in their care. The goals of the Clinic would be to: 1) Provide information to self-represented caregivers regarding their rights and opportunities to access public benefits; 2) Help caregivers self advocate to obtain public benefits to which the children are entitled based on their specific needs; and 3) Reduce delays for caregivers and children seeking to exit the foster care system, by identifying and resolving benefits agreements, which are prerequisites to completing adoptions and legal guardianships. The Clinic would be located at the Courthouse, where Alliance attorneys would provide consultation for self-represented caregivers. The Clinic will be open once a week and alternate between in-person and virtual clinic days. The days and times will be arranged with the court. Clinic staffers will provide caregivers with self-help materials in English and Spanish and refer cases to the Alliance Benefits Program for further advocacy. The Clinic's primary client population would be caregivers, however, Clinic staff could provide consultation as needed to counsel and the court.</p>	\$ 163,000	\$ 163,000
Bet Tzedek Legal Services	Remote Pro Se Technology Initiative	Los Angeles,	<p>Bet Tzedek has been implementing the Self-Help Conservatorship Clinic (SHCC) and Elder Abuse Restraining (EARO) clinics virtually since the start of the pandemic. As the remote pro se assistance model has significantly expanded access for everyone, Bet Tzedek is committed to continuing this successful model post-pandemic and to expand its reach and capacity in 2024.</p> <p>With support from a State Bar Partnership grant, in 2022 Bet Tzedek and the Los Angeles Superior Court (LASC) joined forces to develop the Remote Pro Se Technology Initiative, which refined and expanded the reach of our successful SHCC and EARO clinics through technological innovations. Through a 2023 Partnership grant, we launched new technologies to expand our reach and hired the Pro Se Clinic Coordinator (Coordinator). The Coordinator has provided valuable administrative and technical support to the project. She is also tasked with closely evaluating the new technologies and assessing opportunities for improvement in use and service delivery based on evaluation results from 2023. In 2024, the Coordinator and Clinic team will utilize evaluation results to inform program changes and maximize the tools available through enhanced technology. Program components currently include remote SHCC and EARO Clinic services, online video tutorials and modules to complement remote aid, improvement of court technologies that support remote assistance, outreach to publicize remote services, and remote EARO Kiosk intake. In 2024, based on evaluation results from 2023, the Coordinator and Clinic teams will work to expand our reach by improving the piloted technologies. This initiative will increase access to justice and provide a model for effective remote services throughout California.</p> <p>The Remote Pro Se Technology Initiative will be staffed by SHCC and EARO Clinic staff. The Coordinator hired in 2022 will continue to bridge both clinics, providing intake and follow-up services as well as in-depth evaluation. Remote SHCC assistance will be available Monday-Friday from 9:00am-5:00pm. Remote EARO Clinic assistance will be available Monday, Wednesday, and Friday from 9:00am-5:00pm.</p>	\$ 150,000	\$ 150,000
Bet Tzedek Legal Services	Decedent Estate Self-Help Clinic	Los Angeles,	<p>Grief can be especially complicated for heirs of decedents who were unable to complete an estate plan to probate the estate before their death. Probate is a time-consuming and expensive process, but one that lends itself to a self-help model. In 2022, Bet Tzedek and the Los Angeles Superior Court established the County's only court-based clinic that provides free self-help services to pro per litigants in decedent estate matters. The project continues to operate remotely from Stanley Mosk Courthouse (hours of operation TBD), with the potential to expand to the Antelope Valley Courthouse in the future.</p> <p>Having trained judges on Decedent Estate Clinic opportunities and collaborated with Probate Bench to determine priority of services in 2023, Bet Tzedek will create additional updated resources for litigants in 2024 based on lessons learned. We will continue to develop clinic procedures, improve court processes, and expand services in line with community need. Bet Tzedek staff attorneys and pro bono volunteers will triage decedent's estate cases for pro per litigants and provide either legal information, self-help assistance, or referrals; help litigants determine if they need a full probate, summary probate procedure, or can use a probate alternative; and provide self-help assistance with out-of-court procedures for small estates and summary court procedures for transferring property. Litigants who need to probate a decedent's estate will be referred to the private bar. Bet Tzedek will also begin developing processes for clearing probate notes for litigants who have filed pro per probate petitions.</p>	\$ 165,000	\$ 165,000

California Rural Legal Assistance, Inc.	San Joaquin County Housing Helpline Court Clinic Partnership	San Joaquin,	<p>California Rural Legal Assistance, Inc. (CRLA's) San Joaquin County Housing Helpline provides one-on-one legal advice and/or information to San Joaquin tenants with housing concerns, focusing on housing retention and prevention of homelessness. In addition to individual phone consultations with tenants, Helpline staff offer weekly answer and trial preparation clinics, available to all San Joaquin tenants and landlords. Although most services are delivered virtually via phone and over Zoom, we offer weekly in-person clinics at CRLA's Stockton office located across the street from the court. Beginning in the second quarter of 2023, CRLA plans to begin offering in-person clinics at the court itself and if this service offering is successful will continue to do so throughout 2024. Participants can elect to attend the group answer clinics in-person or via Zoom link.</p> <p>San Joaquin County tenants not eligible for CRLA services are given legal information, know your rights (KYR) print and video resources in multiple languages, referrals, and access to weekly clinics. Landlords are offered information, KYR resources, access to our clinics, and referrals back to the Court Self-Help Center and the San Joaquin Bar Association Lawyer Referral Service for additional assistance. The Helpline will be open Monday, Wednesday, and Fridays from 9:00 am to 12:00 pm and 1:00 pm to 4:00 p.m. Answer and trial preparation clinics will be held once or twice a week.</p>	\$ 132,000	\$ 132,000
Central California Legal Services	Guardianship Project	Fresno,	<p>This project enjoys a successful record of assisting eligible self-represented litigants obtain guardianships for minor children, many of whom are already living with family or referred by Child Protective Services. Post-COVID, both parties are hopeful that the project will be fully operational by mid-2023. Staff members from the Fresno Superior Court Probate Division, the Fresno County Law Library, and CCLS will participate in twice-monthly clinics presented on first and third Friday mornings; however, the format of the clinics remains fluid with in-person clinics being the goal.</p> <p>During the clinics, the forms are explained to participants as they follow along on their own forms, filling in the required information and/or taking notes to complete the forms at a later time. This allows the presentations to proceed within the clinic's timeframe, leaving sufficient time to respond to questions litigants may have. Once the forms are completed, litigants may contact CCLS and/or Probate Court staff for final review prior to submitting the forms to the Court for filing. This further ensures the forms are properly completed. The project serves all parties; however, those opposing a guardianship rarely attend or inquire about services.</p> <p>The Court supports the partnership and values the direct benefit provided for those navigating the guardianship process. Participants accurately complete and timely file their documents, saving money and frustration.</p>	\$ 90,000	\$ 90,000
Community Legal Aid SoCal	Norwalk Consumer Debt Series 2024	Los Angeles,	<p>Community Legal Aid SoCal (CLA SoCal) seeks renewed funding to maintain its consumer debt workshop series at the Norwalk Courthouse. The objective of these workshops is to make the debt collection legal process more accessible and understandable to pro per litigants and guide them through any stage of the debt collection process. Consumer debt workshops are provided at no-cost and would continue to be held at the Los Angeles County Superior Courthouse in Norwalk four times per month.</p> <p>The Norwalk Consumer Debt Series is designed to assist pro per litigants starting at the earliest stage of the debt collection process, from the receipt of a letter demanding payment on a debt to those who have been served with a collection lawsuit and preparing for trial. The project also informs litigants about collection/enforcement activities following entry of a collection judgment. CLA SoCal's four-workshop series guides litigants through the full litigation cycle, which includes Overview & Answer, Discovery & Motions, and Settlement/Evidence/Getting Ready for Trial. Litigants at the Overview & Answer workshops can request that project staff review their documents for completeness.</p> <p>The project will be staffed by an attorney and paralegal, one of whom will be bilingual. While the project is open to both debtors and creditors, it is designed to help low-income self-represented litigants who are opposed by a party represented by counsel in order to increase access to the justice system for low-income individuals/families.</p>	\$ 34,000	\$ 30,600
Community Legal Aid SoCal	Compton Self-Help Economic Expansion Project Year 3	Los Angeles,	<p>Over the past two years, the Compton Self-Help Center Economic Expansion Project (EEP) has expanded capacity for consumer debt issues and COVID-19 back rent small claims issues at the Compton Superior Courthouse Self-Help Center (SHC). Additionally, during the past year, SHC staff have seen a dramatic increase in demand for landlord/tenant assistance from self-represented litigants. As a result, Community Legal Aid SoCal (CLA SoCal) seeks to broaden the scope of this project to include housing assistance.</p> <p>The EEP seeks to help the Court weather the continuing pandemic and economic challenges by educating self-represented litigants about COVID-19 back rent small claims, consumer debt, and eviction processes. It is a critical service for the Compton Courthouse which serves communities that are home to significant economic and health disparities that have been worsened by COVID. As a result, there is a need for local capacity to help self-represented litigants who must engage with the civil legal system through these types of cases.</p> <p>With a 1.0 FTE Attorney, this project allows CLA SoCal staff to provide one-on-one information to self-represented litigants who are at the Compton Courthouse or who are being helped remotely. Primary goals are to help litigants understand the legal process, and correctly complete documents in order to assist litigants and help reduce obstacles for court proceedings. Litigants who would benefit from additional services, would be referred to a regional legal aid organization based on their zip code and/or the County of Los Angeles' Department of Consumer and Business Affairs (DCBA).</p>	\$ 91,000	\$ 81,900

Community Legal Aid SoCal	Orange County Consumer Debt Series 2024	Orange,	<p>Community Legal Aid SoCal (CLA SoCal), with subgrantee Public Law Center (PLC), proposes to maintain their consumer debt series. The objective of these workshops is to make the debt collection legal process more accessible and understandable to pro per litigants and guide them through the life cycle of the debt collection process. Consumer debt workshops are provided at no-cost and will continue to be held at spaces near the OC Central Justice Center.</p> <p>The Orange County (OC) Debt Series is designed to assist pro per litigants from the receipt of a letter demanding payment on a debt to those who have been served with a collection lawsuit and preparing for trial. The project also supports litigants who are subject to collection/enforcement activities following entry of a collection judgment.</p> <p>CLA SoCal and PLC will provide a monthly series that includes four workshops that guide litigants through the full litigation cycle: Overview & Answer (twice monthly), Discovery & Motions, and Settlement/Evidence/Getting Ready for Trial.</p> <p>The project will be staffed by an attorney and paralegal, one of whom will be bilingual. While the project is open to both debtors and creditors, it is designed to help low-income self-represented litigants who are opposed by a party represented by counsel in order to increase access to the justice system for low-income individuals/families. This will support pro per litigants' ability to better participate in the courtroom and present their case helping to ensure a more equitable and efficient judicial process.</p>	\$ 67,000	\$ 60,300
Elder Law & Advocacy	Imperial County Restraining Order Clinic	Imperial,	<p>The Imperial County Restraining Order Clinic is intended to serve older adult self-represented litigants, including those who are limited or non-English speakers, and offer services at the central Imperial County Superior Court. The goal for each participant is that they will be able to gain legal information regarding Restraining Orders, if a Restraining Order is appropriate for their situation, and successfully complete the necessary paperwork to submit a request and/or answer. The project will be an expansion of the 2023 Elder Abuse Technology Project Clinic which is working to create two kiosks located within the Imperial County Courthouse. Along with staff, the kiosks will guide eligible participants through the process of a restraining order in a step-by-step manner in order to facilitate accurate completion of the required forms. Elder Law & Advocacy (EL&A) will work to serve residents of this geographically large, diverse, and underserved county. Meetings between EL&A and the Court will consist of in-depth discussions of matters concerning ongoing clinic operations and will result in changes where indicated.</p>	\$ 92,000	\$ 92,000
Family Violence Law Center	Domestic Violence Pro Per (DVPP) Project		<p>The Domestic Violence Pro Per (DVPP) Project is a successful ongoing collaboration between Family Violence Law Center (FVLC), Legal Access Alameda (LAA, formerly Volunteer Legal Services Corporation of the Alameda County Bar Association (VLSC)), and the Self-Help Center of the Superior Court of California, County of Alameda (SHC). The DVPP Project increases access to legal services for pro per litigants in South Alameda County by serving self-represented petitioners and respondents from across South Alameda County in Domestic Violence Prevention Act restraining orders, family law and (new in 2024) housing matters. Project partners will meet the needs of self-represented litigants, including those who are low income and/or limited English proficient, in domestic violence, family law and housing matters by implementing the following objectives: 1) FVLC and LAA will hold a joint weekly Domestic Violence Petitioner Clinic for DVPA petitioners at the Hayward Hall of Justice (or virtually if required for public health reasons), staffed by a FVLC attorney, FVLC pro bono attorneys and law clerks and/or LAA pro bono attorneys; 2) SHC will provide legal information and paperwork preparation to both DVPA respondents and petitioners in DVPA matters and in housing matters, and LAA will provide assistance to petitioners and respondents through an LAA clinic; and 3) FVLC will accept warm direct referrals from SHC and the clinics for legal representation in court as agency resources allow (this will be funded by multiple other sources).</p>	\$ 25,000	\$ 25,000
Inland Counties Legal Services	Family Law Assistance Project (FLAP)	Riverside,	<p>The Family Law Access Project (FLAP) breaks down barriers for self-represented family law litigants to improve access to the family law court, specifically the Larson Justice Center which serves the rural areas of the Coachella Valley. FLAP is a collaboration between Inland Counties Legal Services and the Riverside County Superior Court. FLAP assists low-income consumers with counsel and advice and document preparation in the areas of dissolution, child custody and visitation, child and spousal support, paternity actions and domestic violence restraining orders.</p> <p>All prepared documents are reviewed by an attorney to ensure accuracy and the court consumer will be provided with guidance on how to navigate the court process and prepare for their hearing.</p> <p>The success of this project will ensure that court consumers will be able to finalize their dissolution action, obtain domestic violence restraining orders and gain custody and support orders. The project provides low-income consumers meaningful access to the courts.</p>	\$ 141,000	\$ 141,000

Inland Counties Legal Services	Consumer Rights Clinic (CRC) EXPANDED	Riverside, San Bernardino,	<p>The Consumer Rights Clinic ("CRC") has been a successful partnership between ICLS and the San Bernardino and Riverside Superior Courts providing legal assistance to unrepresented indigent consumers with debt collection lawsuits.</p> <p>The project will fund an attorney, a paralegal, and a legal secretary and builds upon a document automation application (created specifically for the Consumer Rights Clinic project with non-Partnership funding) that allows consumers to respond, propound discovery, and attempt settlement with opposing counsel. All documents produced are reviewed by an attorney.</p> <p>The San Bernardino Superior Court (at the Justice Center, Central District) and the Riverside Superior Court (at the Corona Courthouse and outlying courthouses) will provide space for ICLS to operate and make referrals to the Clinic. Staff will serve pro se defendants in the courthouses either in person or virtually on a regularly scheduled clinic day. Staff will attempt to settle/dismiss cases as soon as possible. The ICLS attorney will not represent the client on the record or appear in court on the client's behalf. Through counsel and advice and document preparation, the goal is to increase access to justice for clients and alleviate the demand on the court's time by resolving cases expeditiously.</p> <p>ICLS has developed the process of working with clients and volunteer attorneys remotely and can operate remotely at any time when public health restrictions are in effect.</p>	\$ 255,000	\$ 255,000
Justice & Diversity Center of the Bar Association of San Francisco	Family Law Assisted Self Help (FLASH) Project	San Francisco,	<p>The Justice & Diversity Center of the Bar Association of San Francisco (JDC) requests a Partnership Grant to operate the Family Law Assisted Self Help (FLASH) project, which provides legal assistance to indigent Self-Represented Litigants (SRLs) at the San Francisco Superior Court (Court), via its ACCESS Center. Services consist of direct legal assistance to SRLs on the Family Centered Case Resolution (FCCR) Calendar, where cases that have failed to conclude are called. The FLASH Attorney works with income-qualified litigants on this calendar and thereafter to complete their matters. The FLASH Attorney also meets one-on-one with SRLs referred by the ACCESS Center throughout their cases. The FLASH Attorney provides information and guidance and drafts all necessary pleadings for SRLs who are not able to complete their divorce paperwork without the assistance of FLASH.</p> <p>As a result of the COVID-19 pandemic, JDC has developed innovative methods to communicate and interact with SRLs. Our intake form has been converted to an electronic fillable document so the ACCESS Center can complete the initial set of pleadings for each SRL. Additionally, we have added text communication capability as most of the FLASH Attorney's low-income clients are unable to use video-conferencing.</p> <p>In March 2020, the Court ended Mandatory Settlement Conference (MSC) Workshops and, indeed, all workshops or group meetings. The Court now refers litigants directly to JDC when income-qualified SRLs need help with MSCs and MSC Statements. The FLASH Attorney works individually with these clients to complete the extensive MSC Statement and to prepare to present their cases at the MSC.</p>	\$ 70,000	\$ 70,000
LACBA Counsel for Justice	Domestic Violence Legal Services Project (DVP)	Los Angeles,	<p>The Domestic Violence Legal Services Project (DVP, or "Project") of LACBA Counsel for Justice assists self-represented litigants in restraining order cases. The main goal of the Project is to provide access to justice in these complex cases by helping litigants to (a) make informed choices about their legal problems and (b) properly present their issues to the Court. DVP accomplishes this by providing legal information, direct referrals to supportive agencies, and individualized assistance with forms including requests, responses, and renewals.</p> <p>DVP recruits and trains volunteer attorneys and law students, who work one-on-one with litigants to prepare court forms with review by the Project Attorney. DVP also operates two self-help kiosks where litigants can prepare their own forms via the Court's web-based forms production program, with review by the Project Attorney.</p> <p>The Project is staffed by one Directing Attorney, one Project Attorney, and one FTE paralegal who work with litigants and assist or supervise volunteers, plus one Project Coordinator who assists with the administrative aspects of the clinic. DVP's Directing Attorney is responsible for overall supervision and direction of the Project. As it has for over 30 years, DVP works closely and continuously with the Court on issues including cross-referrals, program development, and evaluation. (DVP, the Restraining Order Center, and Family Court Services are all located on the second floor of the Stanley Mosk Courthouse.) DVP is open Monday-Thursday from 8:00 a.m. to 12:00 p.m. and 1:00-3:30 p.m., and Friday from 8:00 a.m. to 12:00 p.m.</p>	\$ 104,000	\$ 104,000
Legal Access Alameda	Family Law Day of Court	Alameda,	<p>Legal Access Alameda's Family Law Day of Court Clinic (FLDOC) is an in-court clinic where volunteers take referrals directly from the bench on the Family Law Pro Per Request for Order (RFO) calendars. In Alameda County, self-represented litigants (SRLs) are generally assigned a specific day on each Family Law Department's calendar. Each clinic is staffed by a supervisor, either the FLDOC Supervising Attorney or a Self-Help staff person, and one to three volunteers. Volunteers and clinic staff work closely with judicial officers and courtroom personnel. The clinic seeks to assist all SRLs whose cases are set on the RFO calendar and who appear for their hearing. The hearings are short-cause hearings that are generally for child custody, visitation, and support.</p> <p>FLDOC provides assistance to the six non-DCSS family law departments on their pro per RFO calendars. These calendars occur in the morning or afternoon, several times per week. The FLDOC clinic currently provides both in person and remote services as necessary.</p> <p>The primary goal of the clinic is to provide SRLs with signed, clear, and enforceable orders as soon as possible after their hearing. Clinic staff and volunteers draft the orders immediately after the hearing, and submit proposed orders for the judge's signature and filing by the court clerk. FLDOC also assist SRLs by clarifying the newly-issued orders, explaining legal terms and court procedures, completing necessary paperwork, and running child and temporary spousal support calculations.</p>	\$ 25,000	\$ 25,000

Legal Access Alameda	Family Law Status Conference	Alameda,	<p>The Family Law Status Conference Clinic ("FLSC Clinic") offers assistance to litigants appearing on Self-Represented Litigant Family Law Status Conference calendars in a family law department. This program brings a Legal Access staff attorney (the FLSC Attorney) on-site to provide expanded services to litigants and oversight of volunteer attorneys.</p> <p>The FLSC clinic assists with Dissolution, Legal Separation, Nullity, and Parentage cases. Clinic staff (the FLSC attorney and Self-Help staff) and volunteers help litigants understand case procedure and complete or correct necessary forms, with the ultimate goal of assisting litigants in moving their cases to a final resolution, either by completing a judgment or referring the case for trial setting. This helps the court with the status conference compliance requirement under CRC Rule 5.83(c)(2) and facilitates more efficient support to litigants with on the spot assistance and by identifying issues early on in the process.</p> <p>Before CoVid19, the FLSC clinic occurred Tuesday and Thursday afternoons, and some Friday mornings, providing all services in person. In 2020 the FLSC department started holding all hearings via video conference and consolidated all FLSC clinic cases to Tuesdays. While providing services remotely, clinic staff send litigants required forms via email and mail. The FLSC Attorney also sends letters to litigants before each clinic, which include description of how to complete the next step, required forms and filing options.</p>	\$ 65,000	\$ 65,000
Legal Aid Foundation of Los Angeles	Torrance Self Help Center Access Project	Los Angeles,	For 19 years, Legal Aid Foundation of Los Angeles (LAFLA) has closely partnered with the Los Angeles County Superior Court to deliver high-quality, courthouse-based assistance to self-represented litigants. In response to the COVID-19 pandemic, LAFLA rapidly transitioned to a remote assistance delivery model in March 2020, and although the Courts and LAFLA's Self-Help Legal Access Centers returned to a hybrid service delivery model in February 2022, we remain keenly aware that low-income, self-represented litigants across the greater South Bay in Los Angeles County require deeper and more expansive in-person options to access the justice system. To address this need, this project seeks funding for one full-time-equivalent attorney (FTE) to (1) reinstate group-based workshops at the LAFLA's Torrance Self-Help Legal Access Center ("Center") inside the Torrance Courthouse, which have remained on pause due to pandemic-related space considerations, (2) increase in-depth onsite services at the Torrance Center for litigants facing legal crises with their personal safety and family-related needs, and (3) develop mobile-friendly scheduling and document review systems to augment the Court's hybrid family law workshops.	\$ 100,000	\$ 100,000
Legal Aid Foundation of Los Angeles	Remote Self Help Center Access Project	Los Angeles,	For nearly two decades, Legal Aid Foundation of Los Angeles (LAFLA) has closely partnered with the Los Angeles County Superior Court to deliver high-quality, courthouse-based assistance to self-represented litigants. In response to the COVID-19 pandemic, LAFLA nimbly transitioned to a remote and then hybrid assistance delivery model, serving over 25,000 pro se litigants to date via telephone, text message, video conferencing, and mail technologies. Although we returned to in-person services in February 2022, we are humbled by the number of litigants who experience ongoing barriers to the justice system and seek initial assistance from LAFLA's Remote Self-Help Hotline. From transportation, to health concerns and disability access, to legal literacy and language barriers, low-income litigants need and deserve accessible and contemporaneous options that meet their needs. To address this need, LAFLA's expert self-help team remains the only Los Angeles Superior Court partner with a live telephone hotline that provides immediate remote assistance to litigants facing legal crises with their housing stability, personal safety, and family-related matters. This projects seeks funding for one full-time-equivalent attorney (FTE) that would enable LAFLA to (1) sustain our unique live self-help telephone hotline Monday-Thursday for litigants who experience barriers to in-person, courthouse-based services, (2) utilize technology to continue developing innovative and plain language mobile-friendly fillable forms, and (3) in collaboration with the Court, enhance our remote supervision of Court JusticeCorps members and other volunteers who deliver an increasing volume of remote Unlawful Detainer Answer and Motion to Set Aside eviction judgment assistance.	\$ 100,000	\$ 100,000
Legal Aid Foundation of Santa Barbara County	Legal Resource Center Partnership	Santa Barbara,	LAFSBC proposes to continue Partnership funding for a self-help attorney for the civil Legal Resource Centers (LRC) and a part-time assistant. Until the hiring of a 3rd LRC attorney with Partnership funds in 2020, the staffing level of the Legal Resource Centers had not increased for at least 15 years. In calendar year 2022, the LRCs countywide served over 6,800 self-represented litigants in civil matters. We seek to continue our project. The LRC partnership attorney will work 1 day per week in person at the Lompoc courthouse. On the remaining days, the bilingual LRC Partnership attorney will assist SRLs countywide by phone, email, or videoconference, with a focus on mid and south county residents. The LRC assistant will provide in-person bilingual support to the LRC at the Santa Barbara courthouse and other data entry assistance. The other two attorneys, funded separately, will cover in-person services in Santa Barbara and Santa Maria. We believe that by providing a combination of remote and in-person services, we will best meet the needs of residents across the 75 mile length of our county.	\$ 156,000	\$ 156,000
Legal Aid of Marin	Homelessness Prevention Through Mandatory Settlement Conferences	Marin,	Now in its 11th year, the Marin Superior Court Unlawful Detainer Mandatory Settlement Conference Program provides critical pre-trial settlement negotiation services to pro per litigants in eviction cases. The target constituency is low-income or otherwise marginalized pro per litigants who cannot afford the cost of private legal representation. This program is a strong partnership whereby the Court requires parties to engage in mandatory settlement conferences staffed by in-house and pro bono attorneys recruited and trained by Legal Aid of Marin in an effort to resolve eviction cases without the risk of proceeding to trial. Prior to March 2020, "UDMSCs" were conducted during the week before trial at the Marin Superior Courthouse. In response to the limitations imposed by the COVID-19 crisis and continued in light of the resulting efficiencies, UDMSCs are held each Thursday afternoon starting at 1:30pm via Zoom. Legal Aid of Marin and the Court collaborate to ensure litigant and volunteer access to UDMSCs. The Court provides general oversight and approves proposed settlement agreements if reached by participants. A majority of UDMSCs result in approved settlement agreements and case dismissals - a testament to the program's effectiveness. Settlement agreements include tenancy preservation, case dismissal, rent forgiveness, and time to relocate. These outcomes prevent immediate and future homelessness. If funded, this grant will afford Marin Superior Court and Legal Aid of Marin the opportunity to increase access to justice and housing stability, encourage judicial economy, and promote civility between litigants involved in unlawful detainer actions.	\$ 80,000	\$ 80,000

Legal Aid Society of San Bernardino	Caregivers and Small Estates Accessing Justice (CSEAJ)	San Bernardino,	<p>The Legal Aid Society of San Bernardino will provide direct legal services to qualifying Pro Se litigants for Small Estates, Conservatorship, and Guardianship actions. The project will not provide legal advice but general information to help all qualifying court patrons. LASSB will provide available information, review existing documents, and prepare documents needed for case completion. The Court will refer litigants to the project and provide specific instructions on case document preparation in some cases. The project will reduce the case backlog and the Court's administrative costs while providing efficient case processing, reducing the number of visits to the courthouse, and reducing litigants' confusion and stress.</p> <p>General information will include legal aspects and clarification of terms or conditions. LASSB will prepare corrected or missing pleadings, assist with pre-and post-hearing tasks, and provide procedural assistance to facilitate immediate filing and processing of their casework.</p> <p>Project services will be provided in English and Spanish, Mon.-Thur. 9 am-12:30 pm and 1:30 pm-4 pm within the Justice Center. Litigants will benefit by attaining information, securing missing or corrected pleadings, and completing required tasks. The project will allow efficient case processing, reduce the number of visits to the courthouse, and reduce litigants' confusion and stress. It will eliminate delays in resolving small estates and ensure disabled adults and beloved minors attain access to daily care and healthcare services despite being disabled or estranged from their parents. The project will reduce the case backlog and the Court's administrative costs.</p>	\$ 165,000	\$ 165,000
Legal Aid Society of San Diego	East County Restraining Order Clinic	San Diego,	<p>In partnership with the San Diego Superior Court, Legal Aid Society of San Diego's (LASSD) Pro Bono Program seeks to continue offering a full-time Domestic Violence/Civil Harassment/Elder Abuse Restraining Order Clinic at the East County branch of the San Diego Superior Court. The Court has expressed a need for daily full-time services to be offered to East County residents who are seeking protection from violence, stalking, sexual assault, elder/dependent adult abuse, and severe harassment. The project will operate daily in the East County Regional Center branch court from 8:30 a.m. to 12:00 p.m. and 12:30 p.m. to 4:00 p.m., Monday through Friday, providing assistance with court forms, explanation of the law, options and alternatives, and referrals.</p> <p>The program will be staffed with one staff attorney, one advocate, and volunteer attorneys and students. Ongoing communication with court personnel will create a collaborative program that benefits both the court and self-represented litigants in having appropriate paperwork processed efficiently.</p> <p>The main goals of the program are to help self-represented litigants access and fully participate in the legal system, and educate litigants so they can make more informed choices that result in effective and efficient filings for the litigant and the Court. Helping litigants complete necessary paperwork ensures that the Court is given the information necessary to render a decision on a temporary restraining order that day. By providing these services, the program assists pro per petitioners protect themselves from dangerous situations, and pro per respondents protect themselves from frivolous litigation.</p>	\$ 190,000	\$ 190,000
Legal Aid Society of San Diego	South Bay Restraining Order Project	San Diego,	<p>In partnership with the San Diego Superior Court, the Legal Aid Society of San Diego (LASSD) Pro Bono Program seeks to offer a full-time Domestic Violence/Civil Harassment/Elder Abuse Restraining Order Clinic at the South County branch of the San Diego Superior Court. The Court has expressed the need for daily full-time services to assist the rising number of South County residents seeking protection from violence, stalking, sexual assault, elder/dependent adult abuse, and severe harassment. The project would operate daily in the South County Regional Center branch court from 8:30 a.m. to 12:00 p.m. and 12:30 p.m. to 4:00 p.m., Monday through Friday, providing assistance with court forms, explanation of the law, options and alternatives, and referrals.</p> <p>The program will be staffed with one staff attorney, one advocate, and volunteer attorneys and students. Ongoing communication with court personnel will create a collaborative program that benefits both the court and self-represented litigants in having appropriate paperwork processed efficiently.</p> <p>The main goals of the program are to help self-represented litigants access and fully participate in the legal system, and educate litigants so they can make informed choices resulting in effective and efficient filings for the litigant and the Court. Helping litigants complete necessary paperwork ensures that the Court receives the information necessary to render a decision on a temporary restraining order that day. By providing these services, the program helps pro per petitioners protect themselves from dangerous situations, and helps pro per respondents protect their due process rights by properly responding to petitions.</p>	\$ 180,000	\$ 180,000
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	, Alameda,	<p>The Partnership to Assist Guardianship Litigants is a collaborative effort of Legal Assistance for Seniors (LAS), Legal Access Alameda of the Alameda County Bar Association (LAA) and the Alameda County Superior Court. The Partnership will provide legal assistance to low income, pro per litigants in guardianship cases. Partners will assist with all aspects of these cases including temporary petitions, general petitions, objections, adding or removing co-guardians, petitions for visitation and petitions for termination. The partners will develop sample documents and instructions designed to fill in any potential gaps caused by the reduction in court services, including reduced filing hours and reduced Probate Examiner phone hours. The Partnership will hold weekly workshops to assist with filing requirements. One of the weekly workshops will be dedicated to the complex notice requirements that often result in continuances for the litigants. We will also incorporate lessons learned during COVID and provide remote support if workshops are not feasible due to court safety concerns. LAA volunteers and LAS will provide day of court assistance when the pro per cases are calendared. The day of court assistance includes explaining the procedural deficiencies keeping the cases from being heard, providing forms allowing the litigants to draft declarations to address the procedural issues and assisting with filing documents. The goal of this program is to navigate litigants through the complex procedural process required in guardianship cases, providing low income litigants access to justice while also reducing continuances and preserving court resources.</p>	\$ 55,000	\$ 55,000

Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	Alameda,	The Partnership to Assist Limited Conservatorship Litigants is a collaborative effort of Legal Assistance for Seniors (LAS), Legal Access Alameda of the Alameda County Bar Association (LAA) and the Alameda County Superior Court. The Partnership will provide legal assistance to low income, pro per litigants in limited conservatorship cases. Limited conservatorship cases have complex procedural requirements that are often daunting to pro per litigants who are typically more focused on providing and coordinating the care needed for their loved one. Many of the litigants in Alameda County do not speak English and have trouble navigating the legal system, which can lead to delays in their ability to provide adequate care. This Project allows the Partners to meet a currently unmet need in Alameda County. Partners will assist with temporary petitions, general petitions, objections, orders after hearing and other petitions necessary to meet procedural requirements. The partners will develop sample documents and instructions designed to assist with local rules and the complicated procedural process. The litigants will be assisted at workshops with one workshop a month dedicated to the complex notice requirements in these matters. Virtual assistance and one-on-one assistance will also be provided. LAA volunteers and LAS staff will assist litigants at their court hearings when needed. The goal of the partnership is for the partners to use their experience assisting pro per litigants navigate with the complex procedural requirements of limited conservatorship cases and to avoid multiple continuances that take up court resources and frustrate litigants.	\$ 50,000	\$ 50,000
Mental Health Advocacy Services	Mental Health Court Clinic	Los Angeles,	<p>Mental Health Advocacy Services proposes continuing its Mental Health Court Clinic in partnership with the Los Angeles Mental Health Court targeting individuals with mental health disabilities. The Clinic will be open one day/week (T) for in-person, drop-in consultations and four days/week (M-Th) for phone and email inquiries. The project will be staffed by at least one Staff Attorney and one Case Manager (other staff and volunteers may also be utilized). During the grant period, the Clinic will provide services to approximately 300 individuals.</p> <p>The Clinic will provide Court-approved information and resources about Mental Health Court proceedings to litigants and other members of the public who are not currently in custody. The Clinic will also offer legal information and referrals on a range of ancillary civil legal issues with a goal of helping litigants achieve greater overall stability, thus allowing them to move through their proceedings at Mental Health Court with greater efficiency and success (and with less likelihood of returning). This will include helping litigants secure and maintain housing, helping litigants access SSI or other benefits to which they may be legally entitled, and assisting litigants with obtaining - or having reinstated - their Driver's License or California ID, among other civil, legal needs.</p> <p>Finally, the Clinic will offer quarterly workshops on Psychiatric Advance Directives (PADs). Used widely in other states, and growing in popularity in California, PADs are shown to promote increased autonomy and lead to better health and legal outcomes for people with mental health disabilities.</p>	\$ 180,000	\$ 180,000
Neighborhood Legal Services	POMONA - READY FOR TRIAL!	Los Angeles,	Neighborhood Legal Services of Los Angeles County's ("NLSLA") Pomona - Ready for Trial! Project is an intensive family law trial preparation project based in the Pomona Courthouse to support self-represented litigants. The Project attorney will develop and facilitate trial preparation workshops, consisting of two parts. During the initial workshop, litigants will receive education and assistance in completing their trial brief and other trial forms. The second workshop will prepare litigants for trial day, familiarizing them with the process, walking them through check-in, informing them of the proper way to address the Court and more. The workshop will be provided in English and Spanish. The workshop in Spanish will address unique issues facing non-English proficient litigants, like presenting evidence in a different language and working with court interpreters. The Project will also create a video that provides an overview of trial day at family court, which can be easily shared across the County. The goal of the Project is to demystify the Court processes and reduce the anxiety and stress litigants experience when going to trial. This Project will give litigants the information and confidence needed to represent themselves in family law court.	\$ 107,000	\$ 107,000
Neighborhood Legal Services	PASADENA - CONTINUUM OF SERVICE	Los Angeles,	<p>Neighborhood Legal Services of Los Angeles County ("NLSLA") proposes to continue its project in the Pasadena Courthouse to maintain assistance with UD Answers and serve as a triage on cases that should be placed on the continuum of services for the San Gabriel Valley. Housing continues to be the state's number one priority and State and local leaders continue to work to provide critical services in the homeless prevention efforts.</p> <p>A Right to Counsel Project continues to take shape; the Stay Housed LA Project is overwhelmed with requests for representation from tenants facing eviction. In Los Angeles County, the need continues to be great and even with Stay Housed L.A. resources, Legal Aids simply cannot meet the needs of all tenants presenting with eviction cases at the Pasadena Courthouse. The Unlawful Detainer (UD) process is an expedited one and it is difficult to meet the needs of the numerous tenants who must file an Answer to the UD especially given the quick five-day response deadline under the statute. The Court whose primary focus is family law staffs the Pasadena Resource Center at the Courthouse. This NLSLA attorney with housing experience is able to provide housing services and collaborate in operation of that center. To fill the gap in services, it is essential to continue to fund an attorney from NLSLA to help maintain the continuum of services for housing cases at the Pasadena Resource Center for at least four days a week, 8:30 am to 4:00 pm.</p>	\$ 150,000	\$ 150,000

Neighborhood Legal Services	STABILIZING FAMILIES PROJECT	Los Angeles,	<p>NLSLA proposes to continue operating the Stabilizing Families Project to support self-represented litigants through the Probate Guardianship process. This Project includes education on alternative options to guardianship, application preparation, service requirements, clearing probate notes, and preparing Letters and Orders. The service focuses on empowerment and education to litigants, who would otherwise be unable to afford legal representation throughout the long process of probate guardianship. The Project provides assistance to litigants seeking information and support to obtain, object to, or terminate a legal guardianship, with resources and support offered at all stages. The Project operates in conjunction with the Self-Help hours of operation from 8:30am to 4:30pm.</p> <p>An NLSLA attorney at the Antelope Valley courthouses will provide both remote and on-site support to litigants and collaborate in operating the Center. Following the self-help model, there will be no attorney-client relationship between the attorney and litigants, no court appearances, and no legal advice will be provided. The program's main goals are to alleviate the confusion with probate guardianships through targeted education and to support litigants who are navigating their way without attorney representation.</p>	\$ 110,000	\$ 110,000
Neighborhood Legal Services	San Gabriel Valley - Remote Services - Housing	Los Angeles,	<p>The San Gabriel Valley - Remote Services - Housing Project ("Project") expands NLSLA's partnership with the Los Angeles Superior Court ("Court") to support vulnerable self-represented litigants in the underserved San Gabriel Valley ("SGV"). Utilizing remote technology, the Project will provide self-help assistance with housing matters to litigants in the SGV, including Glendale, Pomona, and West Covina. These areas have limited access to self-help housing services, as many of the currently funded providers are overwhelmed and at capacity with housing services. The program will provide information, education and assistance with the preparation of legal documents to litigants who are navigating the Unlawful Detainer ("UD") process. Litigants will also be able to obtain assistance and resources for pre-UD matters such as Reasonable Accommodation letters, illegal lockout letters, harassment complaints, habitability requests, and tips for navigating security deposit disputes. The Project will include monthly, virtual workshops as additional guidance for tenants and/or property owners on topics such as the post-judgment process.</p> <p>Additionally, the Project will work with the Court to promote and develop an array of web-based tools and interactive materials to educate the public on these and other collaterally related housing issues for community members throughout Los Angeles County. The remote services will collaborate with the Self-Help Legal Access Centers ("SHLAC"). The Project's remote team will work closely with staff working on-site at the courthouses and provide technical assistance to the Court and SHLAC staff as needed.</p> <p>The Project's staffing will include NLSLA's supervising attorney, staff attorney, support staff, and volunteers.</p>	\$ 195,000	\$ 195,000
Neighborhood Legal Services	REMOTE ACCESS - LA	Los Angeles,	<p>NLSLA proposes to further expand and streamline this initial 2.0 Partnership Grants and incorporate remote Hague Service Abroad assistance. NLSLA developed remote operations using telephone, e-mail, document assembly programs created by Pro Bono Net and the Judicial Council, co-browsing, Teams video appointments, and other technologies. We developed protocols, built a system, made modifications, and tested them over time. We used programs developed by the Court such as the Justice Portal to obtain documents from the litigant's case to be able to provide accurate information and assessment of next steps. Although Court operations resumed, safety protocols, continued outbreaks and exposures made litigants seek alternatives to in-person services.</p> <p>In a county of about 10 million people, justice demands continued learning about creating bridges to the communities we serve. In 2024, that means robust in-person and robust remote services. This pilot is critical to solidifying processes and protocols that create access to a population that has been transformed by the pandemic, learning to access services remotely, taking their work and family schedules into consideration. Los Angeles County can better serve litigants by offering both in-person and remote services. To pilot this team, we are seeking two lawyers, two paralegals and one secretary. This team will provide high quality legal services, we will provide accommodations when needed, we will provide language access services and will gather data to make the case to the County of Los Angeles that funding for remote services must be provided long term along with in-person self-help services</p>	\$ 338,000	\$ 225,000

Neighborhood Legal Services	BRIDGE TO SELF-HELP	Los Angeles,	<p>Individuals with physical and mental health challenges require extra support to ensure meaningful access to justice through the courts. Health harming legal needs increase stress, keep patients from adherence to treatment plans, and further intensify instability.</p> <p>To respond to this need, NLSLA will expand partnerships with the Superior Court of California, Los Angeles ("Court") to launch the Bridge to Self-Help ("B2SH") remote Project. The Project will offer self-help services in key legal areas including:</p> <ul style="list-style-type: none"> · family/domestic violence, · housing, · guardianship, and · consumer/finance; · · identify and link key referral sources including healthcare facilities and agencies serving unhoused individuals; and · Evaluate the ongoing need for accommodations and additional supports needed to ensure meaningful access to the courts. <p>The B2SH project will target populations facing challenges that meaningfully limit their ability to access the courts and existing services, including litigants having physical, mental health, developmental, or learning challenges; litigants referred by healthcare providers or other care team member; litigants who are unhoused and referred by a Coordinated Entry System or LAHSA partner agency; and litigants with limited English proficiency. The Project will continue remotely and off-site in collaboration with the Self-Help Legal Access Centers ("SHLAC"). The hours of operation will be during SHLAC operating hours. The project's staffing will include NLSLA supervising attorney, staff attorney, paralegal, and volunteers. The Court's participation will include identifying and referring litigants, and play a vital role in evaluating the project.</p>	\$ 288,000	\$ 250,000
Public Counsel	Further Expansion of Appellate Clinic	Los Angeles, San Luis Obispo, Santa Barbara, Ventura,	<p>Established in 2007, Public Counsel's Appellate Clinic for Self-Represented Litigants provides assistance to indigent, pro se appellate litigants with support from the Second Appellate District of the California Court of Appeal. The key goals of the Clinic are to: (1) improve equal access to justice by helping pro se indigent litigants effectively represent themselves on appeal; and (2) increase the efficiencies of the judicial system by decreasing record preparation times, reducing delays caused by pro se errors, and improving the quality and cogency of the briefing.</p> <p>The Clinic is located at the Court of Appeal in downtown Los Angeles and is currently open to eligible participants three days a week. No direct representation of clients occurs at the Clinic and an attorney-client relationship is formed only for the purposes of short-term limited counsel and advice.</p> <p>Clinic staff work with the court clerks to ensure our services meet litigants' needs for thorough and correct procedural guidance. We communicate informally with the clerk's office on an almost weekly basis. We also meet with the Administrative Presiding Justice at least once per year.</p> <p>The desired outcome of this project is to increase equal access to the judicial system by providing indigent litigants with the tools and technical assistance they need to more effectively represent themselves in the appellate process. This outcome will also serve to reduce delays in the Court's administrative system caused by improper or inaccurate filings, and thereby improve the quality and efficiency of the judicial services that can be provided to the public.</p>	\$ 203,000	\$ 182,700
Public Counsel	Guardianship Clinic	Los Angeles,	<p>Established in 2001, Public Counsel's Pro Per Guardianship Clinic provides legal information, pro per assistance, and referrals to pro per litigants from throughout LA County who are seeking guardianships or other actions in the probate court. We propose to assist approximately 2,000 litigants annually by providing:</p> <ul style="list-style-type: none"> * Information about guardianships and other probate issues; * Screening to ensure that the litigant's legal matter is appropriate for filing in probate court; * Assistance in preparing pleadings; * Assistance with notices; and * User-friendly guides in English and Spanish to assist litigants with guardianship proceedings, including form pleadings, filing instructions, notice requirements, and information on appearing in court. <p>The proposed grant would enable us to operate the Clinic from 9:00am to 3:00pm Monday through Thursday at the Stanley Mosk Courthouse. All services are available in both English and Spanish. Services are provided on-site by Public Counsel staff and pro bono volunteers, including law students and attorneys, trained by Public Counsel.</p> <p>Clinic staff work closely with the court to ensure our services meet litigants' needs. We communicate informally with the clerk's office on an almost weekly basis and meet with the presiding probate judge twice per year, dependent on the current presiding judge's schedule and willingness to meet.</p> <p>Our ultimate goal is to provide the litigants we serve with the tools they need to understand their case and to obtain the outcome they hope to achieve.</p>	\$ 439,000	\$ 261,997

Public Law Center	Adoptive & DeFacto Parent Assistance Project	Orange,	During the past four years, Public Law Center has provided crucial legal services to hundreds of low-income de facto and adoptive parents in Juvenile Court proceedings in Orange County, California. This project seeks to continue those services, which are unduplicated by any other legal services provider in Orange County. The Orange County Superior Court originally sought a project partner to support de facto and adoptive parents in Juvenile Court proceedings, so the Court can use limited funds for contract attorneys for minor/parent representation. Without this project (and the complementary representation services PLC's Family Law Unit provides), adoptive and de facto parents in Dependency Court termination of parental rights proceedings are at risk of becoming the only parties unrepresented by counsel. PLC staff attorneys and trained volunteers provide: information on legal option, information on court procedures, and document preparation and review. The Project also informs litigants about the benefits and options for finding pro bono counsel. Where appropriate, participants are referred out of the Project to PLC's Family Law Unit for placement with in-house or trained pro bono counsel. The Project name was reoriented to properly reflect that 90% of the 100-120 Project cases per year are for adoptive parents. The Project currently operates as a virtual service with the Court providing referrals through social workers from Orange County Social Services. The Court is an engaged partner, ensuring the Project's success rate remains at 100% and participants receive the high quality services.	\$ 65,000	\$ 65,000
San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic		<p>The Central Division Restraining Order Clinic (CDROC) is a collaboration between San Diego Volunteer Lawyer Program, Inc. (SDVLP) and the San Diego Superior Court (Court) to assist domestic violence survivors and survivors of elder or dependent adult abuse in obtaining legal protection and referrals for legal and social services providers. SDVLP staff and volunteer attorneys at the CDROC provide one-on-one assistance to survivors of abuse by preparing Domestic Violence, Elder Abuse or Dependent Adult Abuse Restraining Order (DVRO) applications, which survivors file in pro per. The days and hours of operation of the CDROC are Monday through Friday, 8:30 a.m. to 5:00 p.m., excluding court holidays. The cut-off for walk-in assistance is 3:30 p.m. The CDROC is located on the 4th floor of the Central Courthouse at 1100 Union Street, San Diego, CA 92101.</p> <p>Additionally, the CDROC will hold virtual legal workshops and cover topics such as how to interact with the Court, and what constitutes proper service of process. The CDROC will also develop and hold virtual legal workshops for SRLs on hearing preparation and presentation of evidence, and best practices for attending hearings virtually and in person.</p> <p>Lastly, the CDROC will continue to create a series of short, informational videos on topics related to domestic violence, such as safety planning, the intersection between immigration and domestic violence, the impact of restraining orders on child custody, proper service of process, and how to file evidence. The CDROC will create two to five informational videos to be distributed to clients.</p>	\$ 140,000	\$ 140,000
Senior Citizens Legal Services	2024 Indigent Landlord/Tenant Services and Mediation	Santa Cruz,	The overarching goal of this important Partnership project is to keep people safely housed by educating both sides in housing disputes and promoting mediation prior to unlawful detainer ("UD") hearings. Senior Legal Services ("SLS") has been successfully partnering with the Superior Court of Santa Cruz County ("Court") and contracting with the Conflict Resolution Center ("CRC") since January 2022, and as a result of this partnership has helped Santa Cruz County maintain low levels of eviction filings at the Superior Court. A full time Partnership Legal Advocate provides bilingual, in-person, in pro per services to indigent tenants and landlords at the Santa Cruz County Law Library five days a week. She is available for 26 hours of in person service, and additional 10 hours each week is spent on email and phone pro per services, as well as SLS and Court administrative tasks. Conflict Resolution Center conducts 10-15 pre and post filing UD mediations each month, at a location designated by CRC or via zoom. Services are promoted via e-mail to non-profit, government and legal organizations throughout the County and to the general public through media outlets and social media. The target population for these Partnership services are indigent landlords and tenants from across Santa Cruz County; all share a grave concern about housing and do not have private representation.	\$ 102,000	\$ 102,000
			TOTAL	\$ 5,062,000	\$ 4,694,497

Attachment A11. 2023-2024 CARE Court Grant Recipients
As approved by the Legal Services Trust Fund Commission on August 10, 2023

Organization	Project Name	Counties Served	Requested Amount	Recommended Amount
Justice & Diversity Center of the Bar Association of San Francisco	SF - CARE Court Implementation	San Francisco	\$370,401	\$370,401
Legal Assistance to the Elderly	CARE Court Representation for San Francisco Seniors and Persons with Disabilities	San Francisco	\$381,694	\$381,694
TOTAL			\$752,095	\$752,095