



JUDICIAL COUNCIL OF CALIFORNIA

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REPORT TO THE JUDICIAL COUNCIL

For business meeting on September 24, 2019

Title

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

Rules, Forms, Standards, or Statutes Affected

None

Recommended by

State Bar Legal Services Trust Fund
Commission
Corey N. Friedman, Cochair
Christian Schreiber, Cochair

Agenda Item Type

Action Required

Effective Date

September 24, 2019

Date of Report

September 6, 2019

Contact

Bonnie Rose Hough, 415-865-7668
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Executive Summary

The Budget Act of 2019 includes over \$45 million in the Equal Access Fund for distribution to legal services providers and support centers. The Judicial Council has approved an allocation of \$20 million in funding for homelessness prevention projects. The remaining funds are to be distributed primarily in two parts: IOLTA (Interest on Lawyers' Trust Accounts)-formula grants and partnership grants (with a small amount also distributed for administration). The Legal Services Trust Fund Commission of the State Bar recommends approving distribution of \$23,039,910 in IOLTA-formula grants for fiscal year (FY) 2019–20, according to the statutory formula in the state Budget Act, and \$2,666,000 in partnership grants for 2020. The commission further requests approval of its findings that the proposed budget for each individual grant complies with statutory and other relevant guidelines.

Recommendation

The Legal Services Trust Fund Commission recommends that the Judicial Council, effective September 24, 2019, approve:

1. The distribution of \$23,039,910 in IOLTA-formula grants for FY 2019–20 according to the terms of the state Budget Act;
2. The commission’s determination that the proposed budget of each individual grant complies with statutory and other guidelines; and
3. The distribution of \$2,666,000 in Equal Access Fund partnership grants to the following legal services agencies for programs conducted jointly with courts to provide legal assistance to self-represented litigants:
 - a. **Bet Tzedek Legal Services**
 Self-Help Elder and Dependent Adult Restraining Order Clinic
 (Los Angeles County)..... \$80,000
 - b. **Central California Legal Services, Inc.**
 Guardianship Project \$70,000
 Tenant/Landlord Housing Law Project (Fresno) \$71,000
 Tulare County Unlawful Detainer Workshop..... \$70,000
 - c. **Community Legal Aid SoCal**
 Consumer Debt Workshop at Norwalk Courthouse (Los Angeles)..... \$37,000
 Orange County Community Court Clinic \$29,000
 Orange County Consumer Debt Workshop \$48,000
 Unlawful Detainer Workshop at Norwalk Courthouse (Los Angeles) \$59,000
 - d. **East Bay Community Law Center**
 Traffic Flash Clinic (Alameda) \$44,000
 - e. **Elder Law and Advocacy**
 Imperial County Unlawful Detainer/Elder Abuse Restraining Order Clinic..... \$68,000
 - f. **Family Violence Law Center**
 Domestic Violence Pro Per Project (Alameda)..... \$25,000
 - g. **Greater Bakersfield Legal Services**
 Partnership Shriver Grant (Kern) \$96,000
 - h. **Housing and Economic Rights Advocates**
 Probate Clinic (San Joaquin)..... \$120,000
 - i. **Justice and Diversity Center**
 Family Law Assisted Self-Help/Case Resolution (FLASH/CARE) Project
 (San Francisco)..... \$50,000
 Shriver-SASH Self-Help Custody (San Francisco)..... \$70,000

j. LACBA (Los Angeles County Bar Association) Counsel for Justice	
Domestic Violence Legal Services Project (Los Angeles).....	\$91,000
k. Legal Access Alameda	
Alameda County Family Law Day of Court Project.....	\$30,000
Family Law Status Conference Project	\$65,000
l. Legal Aid Foundation of Los Angeles	
Torrance Self-Help Center.....	\$100,000
m. Legal Aid Foundation of Santa Barbara	
Legal Resource Center Partnership (Lompoc and Santa Barbara)	\$110,000
n. Legal Aid of Marin	
Community Court Expansion.....	\$80,000
o. Legal Aid Society of San Bernardino	
Caregivers Accessing Justice Guardianship Program	\$85,000
p. Legal Aid Society of San Diego, Inc.	
Name & Gender Change Clinic	\$85,000
Unlawful Detainer Clinic Expansion Project.....	\$80,000
q. Legal Assistance for Seniors	
Partnership to Assist Guardianship Litigants (Alameda)	\$50,000
Partnership to Assist Limited Conservatorship Litigants (Alameda).....	\$60,000
r. Legal Services of Northern California	
Mother Lode Pro Per Project (Amador, Calaveras, El Dorado, Placer).....	\$98,000
Small Claims, Guardianship & Shriver Housing Self-Help Project (Yolo)	\$85,000
s. Los Angeles Center for Law and Justice	
Family Law Information for Parents	\$90,000
t. Neighborhood Legal Services of Los Angeles County	
Chatsworth Self-Help Legal Access Center Project.....	\$75,000
Pasadena Unlawful Detainer Assistance Project.....	\$50,000
Shriver LA Self-Help Unlawful Detainer Clinic.....	\$90,000
u. Public Counsel	
Guardianship Clinic (Los Angeles)	\$30,000
v. Public Law Center	
De Facto and Adoptive Parent Assistance Project	\$50,000
Orange County Courthouse Guardianship Clinic.....	\$60,000

w. Riverside Legal Aid	
Small Estates Assistance Program	\$105,000
x. San Diego Volunteer Lawyer Program	
Central Division Restraining Order Clinic	\$100,000
y. Santa Clara University Alexander Law Center	
Consumer Debt Clinic	\$60,000
Total	\$2,666,000

See Attachment A, *Equal Access Fund: Distribution of Funding for IOLTA-Formula Grants and Partnership Grants Under the Budget Act of 2019*, for the text of the commission’s report and the report’s attachments.

Relevant Previous Council Action

The Judicial Council has approved the proposed distribution of Partnership Grants and IOLTA-formula funds for each of the past 19 years based on the recommendations of the Legal Services Trust Fund Commission.

The Budget Act of 2019 provides a one-time \$20 million allocation to the judicial branch to augment the Equal Access Fund. Funds are to be used for qualified legal services providers and support centers to provide legal services to low-income persons for landlord-tenant issues, including legal assistance for counseling, renter education programs, and prevention of evictions. At its business meeting on July 19, 2019, the Judicial Council authorized staff to distribute that one-time allocation to the State Bar for distribution to legal services agencies that meet the eligibility requirements stated in the Budget Act. It further directed staff to report back to the Judicial Council at its meeting on November 14–15, 2019, on the initial grants made.

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. (Sen. Bill 840; Stats. 2018, ch. 29, pp. 10–14.)

In 2005, the Uniform Civil Fees and Standard Fee Schedule Act was approved by the California Legislature and the Governor. That act established a new distribution of \$4.80 per filing fee to the Equal Access Fund. The estimated revenue from filing fees for the fund is \$5,482,000 this year. Those revenues have been collected by the trial courts since January 2007.

The Budget Act requires the Judicial Council to distribute the Equal Access Fund monies to legal services providers through the State Bar Legal Services Trust Fund Commission. The State Bar created the commission to administer the law regulating attorneys’ interest-bearing trust accounts (IOLTAs). (Bus. & Prof. Code, § 6210 et seq.; State Bar, *Rules Regulating Interest-Bearing*

Trust Fund Accounts for the Provision of Legal Services to Indigent Persons [adopted Sept. 1982, amended Mar. 2002], rule 4.)

The Budget Act states that “[t]he Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines.... The Judicial Council may establish additional reporting or quality control requirements....”¹ All recipients of partnership grants are required to conduct an annual evaluation of the effectiveness of the programs and submit their evaluation results to the commission by March 1 of the following year—for this round, 2021.

The Chief Justice, as chair of the Judicial Council, appoints one-third of the voting members to the commission—five attorney members and two public members, one of whom is a court administrator. The Chief Justice also appoints three nonvoting judges to the commission—two trial court judges and one appellate justice. The membership roster is in the commission’s report (Attachment A) at Attachment A1, pages 20-21.

There are two grant programs, IOLTA-formula grants and partnership grants. The Budget Act provides that 90 percent of the funds be distributed to legal services agencies according to a statutory formula (the IOLTA-formula grants). The remaining 10 percent of the funds are to be distributed as partnership grants to legal services programs for projects conducted jointly with the courts to provide legal assistance to self-represented litigants. The process for choosing the legal services programs to receive these partnership grants is stated in the commission’s report at pages 11-15.

For the grant period funded by the 2019 Budget Act, the Legal Services Trust Fund Commission has approved a schedule for allocation of the part of the Equal Access Fund grants referred to as IOLTA-Formula Grants to legal services providers according to the formula established under the Business and Professions Code.

The commission’s report on the allocation of the Equal Access Fund shows that the commission has followed the statutory requirements and the additional criteria adopted by the council at its August 1999 meeting. Therefore, it is appropriate for the Judicial Council to approve the distribution of \$23,039,910 in IOLTA-formula grants awarded by the Legal Services Trust Fund Commission to allow distribution to the eligible organizations in October. It is also appropriate for the council to approve \$2,666,000 in partnership grants.

Distributing the funds to the commission will allow it to carry out the terms of the Budget Act and will put the monies of the Equal Access Fund into the hands of legal services providers to supply legal assistance to self-represented litigants. IOLTA-formula grants are to be distributed

¹ Relevant portions of the Budget Act are in the commission’s report (Attachment A), at Attachment A2, pages 23-25.

on a calendar-year basis beginning January 1, 2020. The fiscal year for the partnership grants commences January 1, 2020.

Policy implications

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

Comments

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

Alternatives considered

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

Fiscal and Operational Impacts

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

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

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

Attachments

1. Attachment A: *Equal Access Fund: Distribution of Funding for IOLTA-Formula Grants and Partnership Grants Under the Budget Act of 2019*



The State Bar *of California*

ATTACHMENT A to the report: Equal Access Fund: Distribution of Funds for Partnership Grants and IOLTA-Formula Grants

Date: August 13, 2019

To: The Judicial Council of California

From: Hellen Hong, Program Director II

Cc: Corey Friedman, Co-Chair, Legal Services Trust Fund Commission
Christian Schrieber, Co-Chair, Legal Services Trust Fund Commission

Subject: Equal Access Fund: Distribution of Funding for IOLTA-Formula Grants and Partnership Grants Under the Budget Act of 2019

EXECUTIVE SUMMARY

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

Historically, the Equal Access Fund has been distributed in two parts: 1) 90% of the funds according to the statutory Interest on Lawyers’ Trust Accounts (“IOLTA”) formula; and, 2) 10% of the funds as discretionary grants for joint projects between court and legal service programs to make legal assistance available to pro per litigants. This year, a new component has been added to the Equal Access Fund to support legal services to prevent homelessness, under both a competitive grants program and a formula allocation process.

Summary of Current Grant Cycle

Pursuant to the Judicial Council’s approval of recommended EAF grants last year, the State Bar is currently administering the 2019 EAF IOLTA-Formula and Partnership Grants:

- IOLTA-Formula Grants. The \$22,923,100¹ in 2019 IOLTA-Formula Grants has funded a wide range of legal services for low-income Californians. These funds were allocated according to the formula at Business & Professions Code § 6210 et seq. (IOLTA statute) and pursuant to established procedures for determining eligibility for and administering IOLTA grants. Two kinds of legal services providers are eligible for grants: “Qualified Legal Services Projects” and “Qualified Support Centers.”
- Partnership Grants. The \$2,575,000 allocated for Partnership Grants in 2019 funds 36 projects (26 organizations) that enhance the ability of unrepresented litigants to pursue justice in civil courts across California. Only Qualified Legal Services Projects are eligible for Partnership Grants.

Any EAF funds not distributed as grants or for administrative costs, are held in reserve for potential shortfalls in filing fee revenue or other future distributions. As of December 31, 2018, this amount was \$2,762,219.

A system of grant application, budget review, performance reports and on-site visits is used to monitor compliance with grant requirements.

Distribution Request to the Council

Since the inception of the EAF in 1999, the Commission has presented the Council with recommendations for approval of EAF Grants prior to the start of the following grant year. This report requests the Judicial Council approve both EAF IOLTA-Formula Grants and Partnership Grants for the 2020 calendar year. Under the current grant timeline, Partnership Grants are reviewed first, and EAF IOLTA-Formula Grant budget proposals will be reviewed in October in conjunction with IOLTA budget proposals.

The Judicial Council has previously approved distribution of \$20,000,000 for homelessness prevention funds at its meeting of July 19, 2019.

At this time, we request the Council approve the distribution of \$25,599,900 pursuant to the 2019 Budget Act, plus residual funds and rounding adjustments, to the specified grants as follows:

IOLTA-Formula Grants. The State Bar requests that the Judicial Council approve the distribution of \$23,039,910 for IOLTA-Formula Grants in the total amount of \$23,520,471 which includes the General Fund Budget Act allocation of \$18,352,800, projected filing fee revenue of \$4,687,110 (subtotaling \$23,039,910), and prior year returned and adjusted grants totaling

¹ Audit corrections and changes to qualified expenditures from grantees caused changes to the original formula distribution of \$23,039,970. The difference of \$116,870 is included in the \$480,561 prior year balance found in the IOLTA-Formula distribution paragraph.

\$480,561. The Commission will identify eligible or provisionally eligible legal services providers in accordance with the Trust Fund Statute on August 23, 2019, and then calculate the appropriate allocation of funds available for EAF IOLTA-Formula Grants under the Budget Act of 2019 thereafter. The Commission will review proposed budgets for expenditure of these funds, to ensure grantee compliance with the statute, rules and guidelines, prior to distribution of grant funds.

Partnership Grants. The State Bar also requests that the Judicial Council approve the Commission's recommendations for Partnership Grants for calendar year 2020 in the total amount of \$2,666,000 and the distribution of \$2,559,990 for funding these grants, including the General Fund Budget Act allocation of \$2,039,200, projected filing fee revenue of \$520,790 and \$106,010 of returned funds from prior years. These discretionary grants will be only available to organizations eligible for IOLTA funding, and are awarded after a careful analysis of grant proposals based on established criteria. Partnership Grants will, upon approval, be distributed to projects that have completed their documentation as early in 2020 as practicable.

INTRODUCTION – THE BUDGET ACT

The Equal Access Fund has been an important source of funding for legal services programs since it was initially established in the Budget Act of 1999 with funding of \$10 million. Originally, a single general fund allocation for the Equal Access Fund was directed to the Council under each Budget Act, to be distributed in grants to legal services providers through the Legal Services Trust Fund Commission (Attachment A1 is a roster of Commission members as of August 23, 2019.) For those years that some judicial branch funding was augmented by the State Appropriations Limit (SAL), the Equal Access Fund also received that augmentation, increasing the fund to \$10,392,000 until 2016 when the general fund allocation was increased by \$5 million, In 2017, it was increased by an additional \$5 million to \$20,392,000. In 2019, the legislature approved a one-time increase of \$20,000,000 to the Equal Access Fund, for legal services to prevent homelessness in California. The 2019 Budget Act allocates \$42,892,000 from the General Fund to the Judicial Council for the Equal Access Fund; \$2.5 million of those funds are directed to the Sargent Shriver Civil Counsel Pilot Project and are not subject to distribution at this time.

Since 2005, this general fund allocation has been supplemented with revenue from filing fees: \$4.80 of the fees received for every first paper civil filing is distributed to the Equal Access Fund. These fees have provided additional annual funding to the Equal Access Fund in amounts as high as \$6,746,491, and as low as \$4,235,927.

The State Bar requests a distribution totaling \$25,599,900 pursuant to the Budget Act of 2019, which is the sum of: (a) the General Fund budgetary allocation of \$20,392,000; and, (b)

additional filing fee revenue under the Uniform Civil Fees and Standard Fee Schedule Act, projected at \$5,207,900.

In addition, an allocation of \$486,000 has been set aside for administrative costs of the State Bar with: \$330,000 from the General Fund Budget Act allocation and \$156,000 from filing fee revenue.

The budget control language generally establishes two types of grants to be funded from the Equal Access Fund: "IOLTA-Formula" grants and "Partnership" grants. The budget also provides for funds for the cost of administration. Pursuant to the language of the Budget Act, distribution is as follows:

- 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 Interest on Lawyers' Trust Accounts ("IOLTA") statute. Funds available for IOLTA-Formula grants equal \$23,520,471; \$23,039,910 from the Budget Act and an additional \$480,561 from previous adjusted grants and residual funds.
- 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." Funds available for Partnership Grants equal \$2,666,000; \$2,559,990 from the Budget Act and an additional \$106,010 from residual funds.

(The relevant portions of the Budget Act of 2019 are included in Attachment A2.)

THE LEGAL SERVICES GRANTS PROGRAM

For each year of the Equal Access Fund, the budget control language has provided for the funds to be distributed "to qualified legal services projects and support centers as defined in § 6213 through § 6215 of the Business and Professions Code." Those provisions of the IOLTA statute establish the basic eligibility requirements for these two categories of organizations that are entitled to receive funding:

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

The fund helps the most vulnerable Californians when they face critical, life-changing legal issues affecting their basic needs, their safety, and their security – issues such as elder abuse, domestic violence, family support, housing or access to needed health care. Among those served are the working poor, children, people who live in isolated rural areas, veterans, those with limited English proficiency, people suffering abuse, people with disabilities and the elderly.

Eligibility and Distribution

All Trust Fund grantees must be nonprofit corporations, must maintain quality control procedures approved by the Commission, and must meet minimum funding and service criteria that are set out in the Business and Professions Code §§ 6214-6215. The requirements regarding eligibility and use of funds are reflected in regulating rules and grant conditions approved by the State Bar Board of Trustees and incorporated into a written agreement with each grant recipient. To monitor compliance with these requirements, the Commission administers a system of grant reporting and oversight that includes written reports, regular personal contact, and on-site visits.

Oversight begins with the annual application for funding. The application includes extensive information about the legal services provider's activities and services, accompanied by an annual financial statement that must be audited (or reviewed, if gross expenditures are less than \$500,000) by an independent certified public accountant. Following the Commission's determination of eligibility and allocation of IOLTA-Formula Grant amounts, each applicant submits a proposed budget for use of the funds, with a narrative description of the services to be provided and how the efficacy and impact of those services will be measured and maximized. The Commission reviews this budget to ensure that it complies with the requirements noted above before any funds are actually distributed. Subsequently grant recipients provide written reports of their expenditure of grant funds, services provided, and clients or customers served.

On-site visits supplement review of the application and budget documentation to monitor compliance with the statutory requirements and grant conditions as well as to evaluate provider effectiveness and monitor the provider's fiscal practices for the handling of grant funds. State Bar staff, sometimes joined by Commission members and Judicial Council staff, conduct these visits on a three-year cycle.

Due to adjustments in the grant calendar since the inception of these grants, since 2016 the Equal Access Fund's IOLTA Formula grant funding cycle has included three quarters funded from one Budget Act, and one quarter funded from the subsequent Budget Act. Thus, the first three quarters of the calendar year 2020 are funded under the 2019 Budget Act, and the projected funding for the period from October through December 2020 is from the 2020 Budget Act. The Grant Agreement provides that that funding is contingent on the appropriation and availability of funds.

IOLTA-Formula Grants. Legal services providers have used the EAF IOLTA-Formula Grants for a wide range of services and activities that reflect both the legal needs of poor people and the unique strengths of the participating programs. A substantial share of the efforts funded by these grants has been aimed at legal needs of children (adoptions, guardianships and children’s access to health care, for example) or the elderly (abuse cases, nursing home evictions, home equity fraud). Others have focused on populations that are particularly at risk, such as people with disabilities, veterans, the homeless, or victims of human trafficking.

The Budget Act requires 90 percent of the Equal Access Fund be distributed to qualified organizations under the same statutory allocation formula as IOLTA funds, consistent with § 6216 through § 6223 of the Business and Professions Code. Business and Professions Code § 6216 establishes this formula:

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

The IOLTA statute also addresses the use of funds by recipient organizations. Qualified legal services projects must use 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. Qualified 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. [Business and Professions Code, §§ 6218, 6220, 6221, 6223]. A list of the 2020 grant recipients under the Budget Act of 2019 is Attachment A3.

Partnership Grants. Since its inception in 1999, ten percent of the Equal Access Fund has been allocated for a competitive grants program for projects that work with local courts to help provide legal services for self-represented litigants. In 2019, 36 projects throughout California are receiving \$2,575,000 in Partnership Grants.

Partnership Grants are limited to organizations that have been found eligible by the Commission to receive IOLTA and IOLTA-Formula grants as “Qualified Legal Services Projects” under Business and Professions Code § 6213(b). Historically, the primary focus of these grants was to “seed” new projects with start-up funding; the Commission took action this

year, with input from the Judicial Council, to revise the funding criteria to identify that another primary purpose of these grants is to sustain legal services in underserved rural areas. In selecting successful proposals, the Commission seeks to maximize the impact of this funding across areas of legal need, population types, and geographical regions.

In the 2020 grant cycle, \$2,666,000 is available for Partnership Grants, which includes \$2,559,990 Budget Act of 2019 funds and an additional \$106,010 in residual amounts remaining from prior years.

Request for Proposals

The Request for Proposals for Partnership Grant projects for calendar year 2020 were released to legal services organizations and local court personnel in March and were due in May 2019. (A copy of this RFP and a sample application are attached as Attachment A4.) The Partnership Grants Committee carefully reviewed and discussed the proposals, and presented funding recommendations to the full Commission at its July 19, 2019 meeting. The Commission adopted those recommendations and presents them now to the Judicial Council.

The Council has final responsibility for approving the Commission's recommendations for grant awards at its September 2019 meeting.

Selection Criteria

The Budget Act contains four essential elements for Partnership Grants:

- Recipients must be eligible for Legal Services Trust Fund Program grants.
- The funds must be used for joint projects of legal services programs and courts.
- The services must be for "indigent persons."
- The services must be for self-represented litigants.

In 1999, the Commission convened court staff, legal services program directors, and staff of the Judicial Council to work with Trust Fund Program staff to develop grant-making processes and set criteria for Partnership Grants. This group concluded, and the Commission concurred, that it was important to give courts and legal services programs considerable latitude to develop effective models to address the needs within their particular communities.

In 2008, the Partnership Committee of the Trust Fund Commission reviewed and substantially reaffirmed most of the practices and priorities it had developed over the years for allocating Partnership Grant funding. At its June 2019 meeting, the Commission approved a revision to the funding priorities for Partnership Grants, to ensure that exceptions to the "five year funding rule" are consistent with those priorities, voting to establish that Partnership Grants are now primarily for the support of new projects, and to sustain services to self-represented litigants in rural areas.

This policy is now being implemented incrementally. Of the five projects seeking continuation funding beyond the fifth year, two (Legal Services of Northern California's Mother Lode Pro Per Project, and Central California Legal Services' Fresno Tenant-Landlord Housing Law Project) were recommended for approval as sustaining services in rural areas. The Mother Lode project is the sole provider of self-help legal assistance for six isolated counties and was recommended for additional funding beyond their request. Two proposals seeking continuation funding (Neighborhood Legal Services' Pasadena Unlawful Detainer Assistance Project and Public Counsel's Guardianship Project) were recommended to receive a reduced grant amount, and one project (Bay Area Legal Aid's San Mateo Consumer Debt Clinic) is not being recommended for a sixth year of funding in 2020.

This policy will be shared as part of the RFP process for Partnership grants for 2021, and will guide the Commission and legal services projects going forward.

As in past years, proposals for 2020 Partnership Grants span a wide range of substantive, procedural, technological and programmatic solutions. All proposals were required to provide items including:

- A letter of support from the applicable court's presiding judge.
- A written Memorandum of Understanding between the legal services programs and the cooperating court indicating how the joint project, the court, and any existing self-help center, including the family law facilitator (as appropriate), will work together.
- A plan for an appropriate level of direct supervision of paralegals and other support staff by a qualified attorney.
- A plan to anticipate and meet the needs of litigants who are not within the legal services provider's service area or are ineligible for their services.
- A plan to address the needs of unrepresented litigants who do not meet the financial eligibility requirements (e.g., by providing general information in the form of local information sheets, videos, workshops, etc.).
- A clearly stated policy regarding administration of financial eligibility standards, and established protocols to observe that policy.
- Protocols to minimize conflicts of interest, or to address them as needed, and to ensure the impartiality of services.
- A plan for project continuity, including efforts to identify and secure additional funding and support.
- A multi-phase evaluation plan including such components as surveys, interviews, focus groups, courtroom observations, and file reviews, with a commitment to report on both qualitative and quantitative project results within three months of the end of the grant year.

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

Overview of Applications and Proposed Grants

For the \$2,666,000 allocated to Partnership Grants, the Commission received 39 applications representing broad geographic diversity, a wide range of substantive areas of law, and numerous types of services to be provided. After review and deliberation, the Commission has recommended 38 of the applications for a grant award.

All of the recommended grants involve collaboration between at least one legal services program and one court. The following list identifies the Commission’s recommendations; proposals for new funding appear in **bold**. The Commission requests the Council’s approval for these Partnership grant awards.

Program	Project	Final Recommendation
Bet Tzedek Legal Services	Self-Help Elder and Dependent Adult Restraining Order Clinic	\$80,000
Central California Legal Services	Guardianship Project	\$70,000
Central California Legal Services	Tenant/Landlord Housing Law Project	\$71,000
Central California Legal Services	Tulare County Unlawful Detainer Workshop	\$70,000
Community Legal Aid - SoCal	Consumer Debt Workshop (Norwalk)	\$37,000
Community Legal Aid - SoCal	Orange County Community Court Clinic	\$29,000
Community Legal Aid - SoCal	Orange County Consumer Debt Workshop	\$48,000
Community Legal Aid - SoCal	Unlawful Detainer Workshop at Norwalk	\$59,000
East Bay Community Law Center	Traffic Flash Clinic	\$44,000

Elder Law & Advocacy	Imperial County Unlawful Detainer/Elder Abuse Restraining Order Self-Help Clinic	\$68,000
Family Violence Law Center	Domestic Violence Pro Per Project	\$25,000
Greater Bakersfield Legal Assistance	Partnership Shriver Grant	\$96,000
Housing and Economic Rights Advocates	Probate Clinic	\$120,000
Justice & Diversity Center of the San Francisco Bar	FLASH-CARE	\$50,000
Justice & Diversity Center of the San Francisco Bar	Shriver-SASH Self-Help	\$70,000
LACBA Counsel for Justice	Domestic Violence Legal Services Project	\$91,000
Legal Access Alameda	Alameda County Family Law Day of Court Project	\$30,000
Legal Access Alameda	Family Law Status Conference Project	\$65,000
Legal Aid Foundation of Los Angeles	Torrance Self-Help Center	\$100,000
Legal Aid Foundation of Santa Barbara County	Legal Resource Center Partnership (Lompoc & Santa Barbara)	\$110,000
Legal Aid of Marin	Community Court Expansion	\$80,000
Legal Aid Society of San Bernardino	Caregivers Accessing Justice	\$85,000
Legal Aid Society of San Diego	Name Change & Gender Change Self-Help Clinic	\$85,000
Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion (Shriver)	\$80,000
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	\$50,000
Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	\$60,000

Legal Services of Northern California	Mother Lode Pro Per Project	\$98,000
Legal Services of Northern California	Yolo Small Claims, Guardianship, and Shriver Housing	\$85,000
Los Angeles Center for Law and Justice	Family Law Information for Parents	\$90,000
Neighborhood Legal Services	Chatsworth Self-Help Legal Access Center	\$75,000
Neighborhood Legal Services	Pasadena Unlawful Detainer Assistance Project	\$50,000
Neighborhood Legal Services	Shriver Los Angeles Self-Help Center	\$90,000
Public Counsel	Guardianship Clinic	\$30,000
Public Law Center	De Facto & Adoptive Parent Assistance Project	\$50,000
Public Law Center	Orange County Courthouse Guardianship Clinic	\$60,000
Riverside Legal Aid	Small Estates Assistance Program	\$105,000
San Diego Volunteer Lawyer Program, Inc.	Central Division Restraining Order Clinic	\$100,000
Santa Clara University Alexander Law Center	Consumer Debt Clinic	\$60,000

Total Amount Of All Recommended Partnership Grant Awards: \$2,666,000

A brief summary of each project is listed in Attachment A5.

NEXT STEPS: TRUST FUND COMMISSION AND JUDICIAL COUNCIL

Legal Services Trust Fund Commission

The Commission will finalize the determination of eligibility of applicants and then provide grantees tentative IOLTA-Formula Equal Access Fund Grant allocation amounts. Each grant recipient will be required to prepare a detailed line-item budget for its EAF IOLTA-Formula Grant. Those detailed budgets will be reviewed by State Bar staff, and presented to the Commission for approval at its November 22 meeting. Thereafter, the State Bar will sign a grant agreement with each recipient program. (Attachment A6 is a form version of the grant

agreements used for 2019 grants. No major changes have been proposed for this year's agreement.)

The 2019 Budget Act funds the EAF IOLTA-Formula Grants for the last quarter of the 2019 grant year and the first three quarters of the 2020 grant year. IOLTA-Formula EAF grants for the period from October through December 2020 will be funded under next year's Budget Act.

The Commission, working through staff, will be responsible for the administration of these Equal Access Funds. The Commission will continue its oversight of the EAF Grant program, including through the onsite monitoring of programs every three years on a rotating basis. Along with the regular reporting required for IOLTA Fund Grants, grant recipients provide separate quarterly expenditure reports for EAF IOLTA-Formula Grants.

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

Judicial Council

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

- The distribution of \$23,520,471² for IOLTA-Formula Grants, for grants to legal services providers determined by the Commission to be in compliance with statutory and other applicable guidelines, in the amounts identified in Attachment A3, as reconciled for rounding adjustments. The funds will be released by the Council to the State Bar in four equal disbursements, and will be paid out to the eligible legal services programs quarterly (or as close to quarterly as possible depending on contract timing), for the period October 1, 2019 through September 30, 2020 (covering the last quarter of the 2019 grant year and the first 3 quarters of the 2020 grant year).
- The distribution of \$2,666,000 for Partnership Grants, and the approval of the grants set forth in detail in Attachment A5, to be disbursed to each grantee as a lump sum in early 2020.

SUMMARY OF COUNCIL ACTION REQUESTED

² As noted above additional \$480,561 from previous adjusted grants and residual funds increased the amount available for distribution to \$23,520,471.

In conclusion, the State Bar requests that the Judicial Council approve, at its September 2019 meeting, a distribution of \$25,599,900 to the State Bar pursuant to the Budget Act of 2019, of which \$23,039,910 is allocated to IOLTA-Formula Grants and \$2,559,990 is allocated to Partnership Grants. As noted above, Council approval is requested for 2020 Partnership Grants in the total amount of \$2,666,000³ as recommended by the Commission. Council approval is necessary to enable timely distribution of funds.

³ As noted above additional \$106,010 in residual Partnership Grant funds has increased the amount available for distribution as Partnership Grants to \$2,666,000.

<p>Corey N. Friedman, Co-Chair</p> <p>The Division of Occupational Safety & Health (Cal/OSHA) 455 Golden Gate Avenue, 9th Floor San Francisco, CA 94102</p> <p>(Judicial Council appointee)</p>	<p>Christian Schreiber, Co-Chair</p> <p>Olivier Schreiber & Chao, LLP 201 Filbert Street, Suite 201 San Francisco, CA 94133</p> <p>(State Bar appointee)</p>
<p>Banafsheh Akhlaghi, Co-Vice Chair</p> <p>NLSCA 35 Miller Avenue, #113 Mill Valley, CA 94941</p> <p>(Judicial Council appointee)</p>	<p>J. Eric Isken, Co-Vice Chair</p> <p>Retired</p> <p>(State Bar appointee)</p>
<p>Amin Al-Sarraf</p> <p>Glaser Weil, LLP 333 S. Hope Street, Suite 2610 Los Angeles, CA 90071</p> <p>(State Bar appointee)</p>	<p>Kim Bartleson</p> <p>Superior Court of California, County of Humboldt 825 Fifth Street Eureka, CA 95501</p> <p>(Judicial Council appointee)</p>
<p>Hon. Louise Bayles-Fightmaster</p> <p>Fightmaster Mediation & Private Judging P.O. Box 1960 Windsor, CA 95492</p> <p>(Judicial Council appointee)</p>	<p>Pamela M. Bennett</p> <p>City of Los Angeles, City Attorney's Office 200 N. Main Street, Suite 900 Los Angeles, CA 90012</p> <p>(State Bar appointee)</p>
<p>Erica Connolly</p> <p>Office of the California Attorney General 455 Golden Gate, Suite 1100 San Francisco, CA 94102</p> <p>(State Bar appointee)</p>	<p>Prof. Herman L. DeBose</p> <p>California State University, Northridge 18111 Nordhoff Street Northridge, CA 91330</p> <p>(Judicial Council appointee)</p>
<p>Prof. Rebecca Delfino</p> <p>Loyola Law School 919 Albany Street Los Angeles, CA 90015</p> <p>(Judicial Council appointee)</p>	<p>Parish Knox</p> <p>Los Angeles City Attorney's Office Land Use Division 200 N. Main Street, CHE, Room 701 Los Angeles, CA 90012</p> <p>(State Bar appointee)</p>

<p>Prof. James Meeker Department Criminology Law & Society University of California, Irvine 12 Thompson Court Irvine, CA 92617 (State Bar appointee)</p>	<p>Bob Planthold California Walks 1904 Franklin Street, #709 Oakland, CA 94612 (State Bar appointee)</p>
<p>Richard G. Reinis Thompson Coburn 2029 Century Park East, Suite 1900 Los Angeles, CA 90067 (State Bar appointee)</p>	<p>Susan D. Ryan Superior Court of California, County of Riverside P.O. Box 1547 Riverside, CA 92502 (State Bar appointee)</p>
<p>Kim Savage Law Office of Kim Savage 2625 Alcatraz Avenue, Suite 331 Berkeley, CA 94705 (State Bar appointee)</p>	<p>Melanie Snider Judicial Council 2860 Gateway Oaks Blvd. Sacramento, CA 95833 (Judicial Council appointee)</p>
<p>Christina S. Vanarelli Christina Vanarelli, Inc., APLC 674 County Square Drive, Suite 304 Ventura, CA 93003 (State Bar appointee)</p>	
<p><u>ADVISOR</u> Hon. Lisa R. Jaskol Superior Court of California, County of Los Angeles Edmund D. Edelman Children’s Court 201 Centre Plaza Drive, Department 402 Monterey Park, CA 91754 (Judicial Council appointee)</p>	<p><u>ADVISOR</u> Hon. William J. Murray, Jr. Associate Justice of the Court of Appeal Third Appellate District 914 Capitol Mall, 4th Floor Sacramento, CA 95814 (Judicial Council appointee)</p>
<p><u>ADVISOR</u> Hon. Brad Seligman Superior Court of California, County of Alameda 24405 Amador Street, Department 504 Hayward, CA 94544 (Judicial Council appointee)</p>	

Assembly Bill No. 74
CHAPTER 23

[Approved by Governor June 27, 2019. Filed with Secretary of
State June 27, 2019.]

AB 74, Ting. Budget Act of 2019.

This bill would make appropriations for the support of state government for the 2019–20 fiscal year.

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

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

SECTION 1.00.

This act shall be known and may be cited as the “Budget Act of 2019.”

[.....]

0250-101-0001—For local assistance, Judicial Branch 127,603,000

Schedule:

(1)	0150010-Support for Operation of Trial Courts.....	83,551,000
(2)	0150051-Child Support Commissioner Program (AB 1058)	54,332,000
(3)	0150055-California Collaborative and Drug Court Projects	5,748,000
(4)	0150075-Grants—Other	1,586,000
(5)	0150083-Equal Access Fund	42,892,000
(6)	Reimbursements to 0150051-Child Support Commissioner Program (AB 1058)	-54,332,000
(7)	Reimbursements to 0150055-California Collaborative and Drug Court Projects	-4,588,000

Attachment A2: Relevant Portions of the Budget Act of 2019

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

Provisions:

1. In order to improve equal access and the fair administration of justice, the funds appropriated in Schedule (5), after distribution of the \$20,000,000 in Provision 6, are to be distributed by the Judicial Council through the Legal Services Trust Fund Commission to qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used for legal services in civil matters for indigent persons. The Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. Ten percent of the funds in Schedule (5) shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and 90 percent of the funds in Schedule (5) shall be distributed consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. The Judicial Council may establish additional reporting or quality control requirements consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code.

[....]

5. Of the funds appropriated in Schedule (5), \$2,500,000 shall be available for the expansion and administration of pilot programs pursuant to the Sargent Shriver Civil Counsel Act (Ch. 457, Stats. 2009).

6. Of the amount appropriated in Schedule (5), \$20,000,000 shall be distributed by the Judicial Council through the State Bar of California pursuant to Provision 1 to qualified legal services projects and support centers to provide eviction defense or other tenant defense assistance in landlord-tenant rental disputes, 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, and homelessness prevention. Of this amount, \$150,000 shall be available, upon order of the Department of Finance, for administrative costs of the Judicial Council and the State Bar. The remaining funds shall be allocated as follows:
 - (a) 75 percent shall be distributed to qualified legal services projects and support centers that currently provide eviction defense or other tenant defense assistance in landlord-tenant rental disputes, as set forth in Provision 6. To expedite the distribution of this percentage of the \$20,000,000, eligible programs shall be limited to those found eligible for 2019 IOLTA funding.

Attachment A2: Relevant Portions of the Budget Act of 2019

Each eligible program shall receive a percentage equal to that legal services project’s 2019 IOLTA allocation divided by the total 2019 IOLTA allocation for all legal services projects eligible for this funding, except that to ensure that meaningful funding is provided, a minimum amount of \$50,000 shall be allocated to each eligible program unless the program requests a lesser amount, in which case the additional funds shall be distributed proportionally to the other qualified legal services projects. These funds shall be distributed as soon as practicable after the effective date of this act and shall not supplant existing resources.

- (b) 25 percent shall be allocated through a competitive grant process developed by the Legal Services Trust Fund Commission of the State Bar to award grants to qualified legal service projects and support centers to provide eviction defense or other tenant defense assistance in landlord-tenant rental disputes, as set forth in Provision 6, to meet the needs of tenants not addressed by the formula provided in subdivision (a). The grant process shall ensure that any qualified legal service project or support center that received funding pursuant to subdivision (a) may only receive funding pursuant to this subdivision if that qualified legal service project or support center demonstrates that funds received under this subdivision will be not be used to supplant existing resources, and will be used to provide services to tenants not otherwise served by that qualified legal service project or support center. The commission shall make the grant award determinations. In awarding these grants, preference shall be given to qualified legal aid agencies that serve rural or underserved communities and that serve clients regardless of immigration or citizenship status. Any funding not allocated pursuant to this competitive grant process shall be distributed pursuant to subdivision (a), except that there shall be no minimum funding amount for these funds.

[...]

0250-101-0932—For local assistance, Judicial Branch, payable from the Trial Court Trust Fund 2,705,376,000

Schedule:

(1)	0150010-Support for Operation of Trial Courts	2,116,843,000
(2)	0150019-Compensation of Superior Court Judges	417,104,000
(3)	0150028-Assigned Judges	29,090,000
(4)	0150037-Court Interpreters	120,686,000
(5)	0150067-Court Appointed Special Advocate (CASA) program	2,713,000

Attachment A2: Relevant Portions of the Budget Act of 2019

(6)	0150071-Model Self-Help Program	957,000
(7)	0150083-Equal Access Fund	5,482,000
(8)	0150087-Family Law Information Centers	345,000
(9)	0150091-Civil Case Coordination	832,000
(10)	0150095-Expenses on Behalf of the Trial Courts	11,325,000
(11)	Reimbursements to 0150010-Support for Operation of Trial Courts	-1,000

Provisions:

[....]

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

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

[....]

Attachment A3: EAF Grants for Calendar Year 2020

Organization	2020 EAF Grant Allocation
Advancing Justice - Asian Law Caucus	\$233,540
Advancing Justice-Los Angeles	\$804,460
Affordable Housing Advocates	\$8,350
Aids Legal Referral Panel	\$24,320
Alameda County Homeless Action Center	\$110,150
Alliance for Children's Rights	\$384,570
Asian Pacific Islander Legal Outreach	\$149,700
Bay Area Legal Aid	\$366,910
Bet Tzedek Legal Services	\$617,610
California Advocates for Nursing Home Reform	\$160,367
California Indian Legal Services	\$184,040
California Rural Legal Assistance Foundation	\$160,367
California Rural Legal Assistance, Inc.	\$1,554,290
California Women's Law Center	\$160,367
Casa Cornelia Law Center	\$222,230
Center for Gender and Refugee Studies - California	\$160,367
Center for Human Rights and Constitutional Law	\$160,367
Central California Legal Services	\$925,150
Centro Legal de la Raza	\$231,380
Chapman University Family Protection Clinic	\$37,160
Child Care Law Center	\$160,367
Coalition of California Welfare Rights Organizations	\$160,367
Community Legal Aid SoCal	\$657,200
Community Legal Services in East Palo Alto	\$161,650
Contra Costa Senior Legal Services	\$23,080
Dependency Advocacy Center	\$81,430
Disability Rights California	\$2,312,060
Disability Rights Education and Defense Fund	\$160,367
Disability Rights Legal Center	\$159,520
East Bay Community Law Center	\$129,370
Elder Law & Advocacy	\$112,260
EVICTION DEFENSE COLLABORATIVE	\$22,920
Family Legal Assistance at CHOC Children's	\$14,390
Family Violence Appellate Project	\$160,367
Family Violence Law Center	\$11,430
Greater Bakersfield Legal Assistance	\$418,020
Harriett Buhai Center for Family Law	\$129,590
HEART L.A.	\$1,250
Housing and Economic Rights Advocates	\$89,740
IELLA Legal Aid Project	\$70,580
Immigrant Legal Resource Center	\$160,367
Impact Fund	\$160,367
Inland Counties Legal Services	\$1,168,090
Inner City Law Center	\$379,600
Justice & Diversity Center of the Bar Association of San Francisco	\$111,170
Justice in Aging	\$160,367
La Raza Centro Legal	\$29,300
LACBA Counsel for Justice	\$96,320
Law Foundation of Silicon Valley	\$214,710
Lawyers' Committee for Civil Rights	\$121,320
Learning Rights Law Center	\$168,260

Attachment A3: EAF Grants for Calendar Year 2020

Organization	2020 EAF Grant Allocation
Legal Access Alameda	\$43,660
Legal Aid at Work	\$305,310
Legal Aid Foundation of Los Angeles	\$901,060
Legal Aid Foundation of Santa Barbara County	\$71,360
Legal Aid of Marin	\$39,450
Legal Aid of Sonoma County	\$103,210
Legal Aid Society of San Bernardino	\$309,160
Legal Aid Society of San Diego	\$687,090
Legal Aid Society of San Mateo County	\$52,950
Legal Assistance for Seniors	\$22,160
Legal Assistance to the Elderly	\$12,990
Legal Services for Children	\$58,180
Legal Services for Prisoners with Children	\$160,367
Legal Services for Seniors	\$91,490
Legal Services of Northern California	\$944,060
Los Angeles Center for Law and Justice	\$128,440
McGeorge Community Legal Services	\$94,300
Mental Health Advocacy Services	\$48,060
National Center for Youth Law	\$160,367
National Health Law Program	\$160,367
National Housing Law Project	\$160,367
National Immigration Law Center	\$160,367
Neighborhood Legal Services	\$697,850
New American Legal Clinic	\$50,870
OneJustice	\$160,367
Prison Law Office	\$267,680
Public Advocates Inc.	\$212,490
Public Counsel	\$906,800
Public Interest Law Project	\$160,367
Public Law Center	\$493,460
Riverside Legal Aid	\$161,920
San Diego Volunteer Lawyer Program	\$161,570
San Luis Obispo Legal Assistance Foundation	\$20,540
Santa Clara County Asian Law Alliance	\$56,010
Santa Clara University Alexander Law Center	\$27,540
Senior Adults Legal Assistance	\$18,700
Senior Advocacy Network	\$42,730
UC Davis School of Law Legal Clinics	\$113,320
USD School of Law Legal Clinics	\$93,140
Voluntary Legal Services Program of Northern California	\$112,380
Wage Justice Center	\$35,680
Watsonville Law Center	\$54,640
Western Center on Law and Poverty	\$160,367
Worksafe, Inc.	\$160,367
Youth Law Center	\$160,367
Yuba-Sutter Legal Center for Seniors	\$15,110
Total	\$23,520,554



The State Bar of California

Partnership Grant Request for Proposal

Background

The State Budget Act allocates funds to the Equal Access Fund to improve equal access and the fair administration of justice. The Equal Access Fund is given to the Judicial Council to be distributed through the State Bar of California. Ten percent of the funds available for distribution support Partnership Grants to legal services programs for joint projects of courts and legal services programs to make legal assistance available to pro per litigants.

The Legal Services Trust Fund Commission (Commission) reviews proposals and makes funding recommendations to the Judicial Council. Grants are awarded for a one-year period commencing January 1. Historically, grants have been awarded in the range of \$25,000 to \$80,000.

Partnership Grants are intended to be seed money to support projects that will eventually be funded from other sources of revenue and as such, funding is typically reduced in the third, fourth, and fifth years. Applicants must describe plans for obtaining funding from other sources to support these projects. Partnership Grant funding was previously limited to five years except under extraordinary circumstances such as projects serving areas affected by disaster or rural areas where the need is high yet alternative funding is unavailable. In 2017, the Commission adopted a policy that maintains the intention to provide seed funding over the course of five years but expands consideration for funding beyond a fifth year. For more information refer to the Partnership Grant 5-Year Funding Policy.

Eligibility

Applicants must meet the following eligibility requirements:

- Qualified Legal Services Projects (QLSPs): Only QLSPs are eligible to apply for Partnership Grants (Business & Professions Code 6210 et seq.).
- Joint Court/Qualified Legal Services Projects: Proposals must be for projects jointly developed and implemented by courts and QLSPs, and, except in rare circumstances, services must be delivered at or near the courthouse.
- 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 in State Court: Use of Partnership Grant funds is restricted to providing assistance to individuals who are pursuing matters in state court without representation by counsel. These funds cannot be used to make court appearances on behalf of litigants.

Requirements

Proposals for funding must address the following:

- Impact of Services: The project must address the needs of the targeted population and achieve meaningful and timely outcomes.
- Collaboration with Cooperating Court: The project must be jointly undertaken with the court. The Commission will consider the extent to which the applicant and cooperating court will collaborate on this project to achieve access for self-represented litigants.
- Integration with Court-Based Services: The applicant's services, or planned services, should be integrated with other court-based services, including the Family Law Facilitator, self-help centers, and other offices of the cooperating court.
- Court's Impartiality: The proposal must ensure the court's independence and impartiality. If the project's services are to be reserved for only one litigant role, such as petitioners but not respondents, or defendants but not plaintiffs, the applicant must demonstrate that it has thoroughly explored all the implications of this decision with the court, and identified alternate legal resources that can provide equivalent levels of assistance to the opposing parties.
- Conflict of Interest: If the project establishes an attorney-client relationship with the self-represented litigants, it must provide meaningful referrals for individuals who are not eligible to use the services because they present a conflict of interest for the project.
- Information and Referrals: The project must address the methods by which it will provide information and referrals to litigants who are not eligible to use its services for any reason.
- Additional Support: In anticipation of the eventual reduction or termination of Partnership Grant support, the applicant must diligently pursue other means for continuing the project. The Commission will consider efforts to pursue other sources of funding and support, as well as contributions actually received, such as commitments of the program's general operating revenue, recruitment of pro bono volunteers, and in-kind support.
- Evaluation: All applicants must incorporate evaluation plans into their Partnership Grant proposal and complete a year-end evaluation report.

Selection Criteria

The Commission has full discretion to recommend grant awards based on its analysis of the need of the communities to be served, and the extent to which a proposal addresses the requirements above. Considerations will also be made to ensure funding supports a diverse range of geographic areas, substantive issues, and client constituencies. Decisions of the Commission, as approved by the Judicial Council, are final. There is no appeals process.

Eligibility Category: LSP

Grant Year: 2020

Due Date: May 3, 2019 5:00pm PST

Prepared by: FiscalReviewer Test

Funding Opportunity: **Partnership Grants**
Project Title: **2020 Example**
Program Name: **Test BriCo Legal Services234**
Applicant Title: **FR Account Tester**
Address: **180 Howard Street 5th Floor**
City: **SanFrancisco**

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

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

Form A - Project Profile

Open the tabs and complete the fields on forms A through F as concisely and completely as possible. Providing complete answers to all questions will help minimize follow-up and may reduce the proposal's likelihood of being denied.

1. Application Contact: Test

Job Title: Test

Email: test@test.org

Telephone: 1234567890

County(ies) Served by this Project

Alpine

3. Total Amount Requested:

\$65,000

Partner Court(s) and Project Location(s)

Partner Court	Name of Location	Address	On-Site Days/Hours	Total Hours/Month
Alameda	Alameda	123	7/24	180

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

Yes

A. Select Project for Refunding:	2019 - Test 2019 Partnership Grant
B. Years Funded by Partnership Grant:	2
C. Current Project Summary: For a continuing project that is currently in operation, include a brief summary of the progress made to date in the current year. (This can include highlights, benchmarks, activities, metrics, challenges, etc.).	test test
D. Previously Funded Project Iterations: Is this project similar to a previously funded partnership grant project? If so, what is different about the current proposed project?	test test

6. Project Abstract

Provide a brief description of the core aspects of your proposed grant project. This abstract will be submitted in summaries provided to the Legal Services Trust Fund Commission and the Judicial Council. (Suggested maximum word count: 250 words)

test

7. Substantive Area(s)

Guardianship

A. Explain "Other":

Form B - Project Description

Answer the following questions as concisely as possible. The answers must be self-contained. Do not refer the reader to any other documents.

1. Program's Qualifications

What is the applicant program's experience providing assistance to self-represented litigants, including court-based services? (Suggested maximum word count: 500 words)

2. Needs Assessment

Describe the demographics of the target community, the geographic area to be served by the project, and why the target population is in particular need of the services to be provided. (Suggested maximum word count: 750 words)

3. Types of Services to be Provided

Describe the legal issues to be addressed and the type and level of services to be offered by the project. How will the planned services address the needs identified? (Suggested maximum word count: 250 words)

A. New Resource Materials:

Describe the materials, who will develop them, and how they differ from existing materials, i.e., at www.courts.ca.gov, www.lawhelpca.org or www.CAlegaladvocates.org.

B. Language Access:

Describe staff language capabilities and plans for developing materials in multiple languages. How will the project provide services to monolingual constituents in languages that staff does not speak.

C. Outreach:

Describe how you will communicate the availability of services to litigants and the community.

D. Project Collaborations:

Describe current and planned collaboration(s) with other legal services programs and other organizations in the community.

E. Changes to Current Partnership Grant Projects:

What changes have been made to the project since it was first funded with a Partnership Grant and why? (Applicants for refunding only.)

4. Goals and Objectives

Report estimated totals for the year.

A. Total Workshops:

B. Total Individuals in Workshops:

C. Total Individuals to Receive 1:1 Services:

Do not include family members and others impacted.

Services and Resources	Goal	
	# of Workshops/Annually	# of Individuals/Annually

Information on Substantive Legal Options

0

0

Attachment A4 - Partnership Grant Request for Proposal and Sample Application for 2020 Funding

Information on General Court Processes and Procedure	0	0
Document Preparation or Review	0	0
Trial/Hearing Preparation	0	0
Other (describe in Question 4e)	0	0

Individually-Delivered (one-on-one) Services	# of Individuals/Annually
Information on Substantive Legal Options	0
Information on General Court Processes and Procedure	0
Document Preparation or Review	0
Filing Assistance	0
Mediation/Settlement Assistance	0
Trial/Hearing Preparation	0
Post-Trial/Hearing Assistance	0
Other (describe in Question 4e)	0

Other Services	# of resource materials	# distributed
Resource Materials	0	0
Other (describe in Question 4e)	0	0

E. Describe "Other":

Describe items listed as "other" in any category in the chart above.

F. Additional Goals:

Describe any additional goals not quantified in the chart above.

G. Workshop Description:

Describe the format for any workshops. For example, use of video conference or online document assembly. Include the goal of each workshop and the

benefit to constituents.

5. Will services be provided at the courthouse?

Services must be provided at the courthouse except in rare circumstances.

No

If no, describe:

Describe project site and explain why services cannot be located at the court. Include how the distance barrier will be addressed and how litigants will receive follow-up assistance.

A. Will all services strictly be provided at the project site?:

No

If no, what services will be provided or completed off-site?:

6. Quality Control

A. Staffing and Supervisory Structure:

Describe the staffing and supervisory structure, identifying key personnel. If onsite supervision is not possible for project staff, describe the steps that will be taken to ensure the highest levels of quality control.

B. Volunteers:

If volunteers will be utilized, indicate whether these will be attorneys, paralegals, law students, etc. Describe the work and explain how they will be

trained and supervised.

C. Document Preparation:

How will the project ensure that documents are completed correctly? If documents will be reviewed by project staff, who will conduct the review and when?

D. Sub-Grant(s):

Provide details for any sub-grant(s), including plans for oversight and evaluation of the services provided by the sub-grantee.

7. Income Eligibility

Describe how the project will verify income eligibility to ensure that Partnership Grant funds are only used to serve indigent individuals. (B&P Code 6213(d))

8. Attorney Client Relationship

Do you plan to establish an attorney-client relationship?

No

If no, explain:

Describe how litigants will be made aware of the scope of services to be provided and how they will be informed that an attorney-client relationship will not be established.

9. Impartiality of the Court

Do you expect to serve only one party or side of a matter?

No

10. Alternative Services

Describe the methods to be used to screen for eligibility, and how the project will otherwise address the needs of unrepresented litigants. What information will be available for litigants who are ineligible for services due to income, subject matter, or residency? If the plan is to provide referral, explain how referrals will be made in situations where the project cannot provide services, such as serving only one party, lack of resources to provide service to all who seek it, or where a conflict arises.

11. Collaboration and Partnership with the Court

Describe the general areas of responsibility that the court has agreed to assume.

A. Plan for Addressing Substantive/Logistical Issues:

Describe plans for meeting with court personnel to discuss substantive and logistical issues as they arise. Coordination meetings should be scheduled no less often than quarterly and should be conducted with formal agendas.

12. New Project Implementation Timetable

Describe the proposed timetable for implementation of the project by quarter. (New projects only.)

13. Evaluation

Provide a detailed plan describing how the project's services will be evaluated. Include an assessment of the benefits of the project's services for those seeking assistance and the impact of those services on the court. Identify the specific methodologies you will use to evaluate and improve services, e.g., interviews with self-represented litigants, court personnel or other partners, surveys, case file review, etc.

14. Project Continuity

Typically grants will be reduced after three years of operation and will not be funded for more than five years. Describe plans to obtain other sources of funding to cover a portion of the project's costs after three years of operation.

<p>A. Pursuit of Funding Sources (last 12 months):</p> <p>List all funding sources that have been explored or pursued for this project in the last twelve months. Identify applications submitted, amounts requested, revenue raised for project operations, and any funds that were obtained by leveraging the Partnership Grant. If applicable, explain any barriers to pursuing funds.</p>	
<p>B. Are you applying for funding beyond a fifth year?:</p>	<p>Yes</p>
<p>i. Court Partnership:</p> <p>Provide a summary of feedback from the court commenting on project efficacy, value, and importance. This may come from a survey or other feedback mechanisms. (Suggested maximum word count: 250 words)</p>	
<p>a. Provide contact information for at least one court representative who can be interviewed regarding this project.:</p>	
<p>Court Representative Name:</p>	<p>Court Representative Email:</p>
<p>Court Representative Phone Number:</p>	<p>Additional Court Representative Contact Information (Optional):</p>
<p>ii. Extended Funding:</p> <p>Include any information relevant to this request</p>	

for extended funding, such as special circumstances pertaining to the ongoing needs of the community served. This might include changed circumstances, special emergencies, or substantive developments that support continued funding; inability to secure replacement funding despite best efforts; or unique opportunities such as scaling or replication capabilities, development of new resources, or other factors that would further benefit self-represented litigants and the courts. (Suggested maximum word count: 500 words)

iii. Project Impact:

Describe key achievements, service accomplishments, and organizational benefits that have resulted from this project. (Suggested maximum word count: 500 words)

Applicants may upload additional documentation or background information, if desired, to the “Document Upload” tab.

Form C - Project Budget

Click on the Open button below to enter the project budget information. Enter your proposed budget with the total requested amount rounded to the nearest thousand. For detailed instructions on completing the project budget and budget narrative, including a description of each line item, refer to the Application Instructions.

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
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Personnel

1. Lawyers	\$0	\$0	\$0	\$0
2. Paralegals	\$0	\$0	\$0	\$0
3. Other Staff	\$0	\$0	\$0	\$0
4. SUBTOTAL	\$0	\$0	\$0	\$0
5. Employee Benefits	\$0	\$0	\$0	\$0
6. TOTAL PERSONNEL	\$0	\$0	\$0	\$0

Non-Personnel

7. Space	\$0	\$0	\$0	\$0
8. Equipment Rental and Maintenance	\$0	\$0	\$0	\$0
9. Office Supplies	\$0	\$0	\$0	\$0
10. Printing and Postage	\$0	\$0	\$0	\$0
11. Telecommunications	\$0	\$0	\$0	\$0
12. Technology	\$0	\$0	\$0	\$0
13. Program Travel	\$0	\$0	\$0	\$0
14. Training	\$0	\$0	\$0	\$0
15. Library	\$0	\$0	\$0	\$0
16. Insurance	\$0	\$0	\$0	\$0
17. Audit	\$0	\$0	\$0	\$0
18. Evaluation	\$0	\$0	\$0	\$0
19. Contract Service to Clients	\$0	\$0	\$0	\$0
20. Contract Service to Organization	\$0	\$0	\$0	\$0
21. Other	\$0	\$0	\$0	\$0
22. TOTAL NON-PERSONNEL	\$0	\$0	\$0	\$0
TOTAL AMOUNT OF FUNDS	\$0	\$0	\$0	\$0

Project Staff	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar monies)	FTEs Total
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1. Lawyers

	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
Total Lawyers	0.00	0.00	0.00	0.00

2. Paralegals

	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
Total Paralegals	0.00	0.00	0.00	0.00

3. Other Staff

	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
Total Other Staff	0.00	0.00	0.00	0.00
TOTAL PERSONNEL(in FTEs)	0.00	0.00	0.00	0.00

Form D - Budget Narrative

Provide an explanation for each line item in the project budget, including the basis for allocations. While the Project Budget form does not include the value of in-kind support, please include any significant in-kind support, such as the use of court facilities or equipment, in the budget narrative. Any expenses entered under Contract Service to Clients (row 19), Contract Service to Organization (row 20), and Other (row 21), must be itemized and explained.

Personnel

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

Non-Personnel

Account Title	Proposed Partnership Grant	Narrative
7. Space	0	
8. Equipment Rental and Maintenance	0	
9. Office Supplies	0	
10. Printing and Postage	0	
11. Telecommunications	0	
12. Technology	0	
13. Program Travel	0	
14. Training	0	
15. Library	0	
16. Insurance	0	
17. Audit	0	
18. Evaluation	0	
19. Contract Service to Clients	0	
20. Contract Service to Organization	0	
21. Other	0	
22. TOTAL NON-PERSONNEL	0	
TOTAL AMOUNT OF FUNDS	0	

Form E - Project Assurances

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

Upload Signed Assurances Document:

Form F - Agreement of the Partner Court

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

1. Upload Letter(s) of Support:

2. Upload MOU(s):

Your MOU should contain:

- a. Project Title
- b. Court Served
- c. MOU Termination Date (or related conditions such as "Continuing")
- d. Each Party's Duties and Responsibilities

Supporting Documents (Optional)

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

Staff Review

Project Budget: No Revision Required

Application Review Complete: No

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Bet Tzedek Legal Services	Self-Help Elder and Dependent Adult Restraining Order Clinic	Los Angeles	Returning	In 2017 Bet Tzedek expanded its elder abuse services by launching the first Self-Help Elder and Dependent Adult Restraining Order Clinic in Los Angeles County. The clinic is now established as a vital self-help resource for victims; demand for services is higher than anticipated. Core components include: (1) partnering with UCLA Law School to offer clinical placement at the Clinic; (2) collaborating with the court on Guide and File; (3) working with APS social workers to file on behalf of incapacitated victims; (4) exploring remote service options; and (5) assisting pro per litigants.	\$ 80,000
Central California Legal Services	Tenant/Landlord Housing Law Project	Fresno	Returning	This project provides individualized assistance from project staff and volunteers to both self-represented tenants and landlords, in completing Judicial Council forms. Litigants receive information on tenant/landlord rights and responsibilities; the UD process; and how to prepare for court.	\$ 71,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Central California Legal Services	Guardianship Project	Fresno	Returning	The Guardianship Project helps low-income self-represented litigants in Fresno County obtain guardianships for minor children, in conjunction with the Fresno Superior Court Probate Division and Fresno County Public Law Library. Litigants receive detailed guidance in completing required forms, and clinic staff review completed forms for accuracy and thoroughness.	\$ 70,000
Central California Legal Services	Tulare County Unlawful Detainer Workshop	Tulare	New	A CCLS attorney will offer trial preparation workshops to litigants who have a scheduled court hearing. The Project will deliver classes in Visalia and Porterville, training litigants how to successfully present their cases, and how to make best use of the Court's mediation process. This proposed project builds on existing services by helping self-represented litigants prepare for trial.	\$ 70,000
Community Legal Aid SoCal (formerly known as Legal Aid Society of Orange County)	Consumer Debt Workshop at Norwalk Courthouse	Los Angeles	Returning	This weekly workshop will educate, inform, and assist litigants regarding debt collection practices, litigants who have been sued in court on debt collection issues, and litigants who have had a debt collection judgment entered against them, to guide them through the debt collection process no matter at which stage they seek assistance.	\$ 37,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Community Legal Aid SoCal	Orange County Consumer Debt Workshop	Orange ☐	Returning	This project conducts a Consumer Debt Workshop at the Central Justice Center in Santa Ana, designed to assist pro per litigants whether at the earliest stage of a debt collection matter to or after having been served with a collection lawsuit, to educate, inform, and assist self-represented litigants so that the debt collection legal process is accessible and comprehensible.	\$ 48,000
Community Legal Aid SoCal	Unlawful Detainer Workshop at Norwalk Superior Courthouse	Los Angeles ☐	Returning	This project conducts a Consumer Debt Workshop at the Norwalk Courthouse, to assist self-represented litigants with information about debt collection practices, including those who have been sued in court on debt collection issues or who have had a debt collection judgment entered against them, to make the debt collection legal process more accessible and comprehensible.	\$ 59,000
Community Legal Aid SoCal	Orange County Community Court Clinic	Orange ☐	New	Community Legal Aid SoCal has proposed presenting two clinics per month in coordination with the Pro Bono Committee of the Orange County Bar Association, with one-on-one consultations to help self-represented litigants identify and respond to civil legal issues having negative impacts on their lives with 1) a legal “checkup” and screening process; 2) an informational clinic for self-represented litigants; and 3) referral if needed.	\$ 29,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
East Bay Community Law Center	Traffic Flash Clinic	Alameda☐	Returning	The East Bay Community Law Center ("EBCLC") will continue to provide pro per assistance to low-income, self-represented litigants through intake clinics, counseling, and Free Legal Assistance Self Help (FLASH) clinics that provide self-help information and support for traffic court related legal issues, including clearing records related to court debt, traffic tickets, and driver's license suspensions.	\$ 44,000
Elder Law & Advocacy	Imperial County Unlawful Detainer Clinic	Imperial☐	Returning	The Imperial County Unlawful Detainer Clinic (ICUD) will continue to provide information and assistance to qualifying self-represented litigants in unlawful detainer matters from the El Centro Superior Court, with both direct assistance and weekly workshops on unlawful detainer cases.	\$ 68,000
Family Violence Law Center	Domestic Violence Pro Per Project	Alameda☐	Returning	The Domestic Violence Pro Per (DVPP) Project is a collaborative project of Family Violence Law Center (FVLC), Legal Access Alameda (LAA), and the Self-Help Center of the Superior Court of California, County of Alameda (SHC), providing legal assistance to pro per domestic violence litigants at weekly Domestic Violence Petitioner Clinic for DVPA petitioners at the Hayward Hall of Justice and an existing LAA family law clinic.	\$ 25,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Greater Bakersfield Legal Assistance	Partnership Shriver Grant	Kern ☐	Returning	This grant will support GBLA's provision of legal information for self-represented litigants ineligible for service through this court's Shriver project, with linkages to supportive social services and resources to help move them to self-sufficiency, as well as legal information and counsel, review of options for possible early dispute resolution and preparation of responsive pleadings for the tenant in pro per.	\$ 96,000
Housing and Economic Rights Advocates	Probate Clinic- San Joaquin County	San Joaquin ☐	New	This project will provide in pro per services for pro se litigants in the Probate Division, to facilitate the flow of cases through the court and ease the process for pro se litigants and the court by advising the public on the legal process itself, types of forms to be used and how to complete them, and steps to take in responding to court requests.	\$ 120,000
Justice & Diversity Center of the Bar Association of San Francisco	FLASH-CARE	San Francisco ☐	Returning	This project provides legal assistance to indigent Self-Represented Litigants with continued legal assistance at two court calendars, to move inactive family law cases toward timely disposition and to assist SRLs with preparation for trial and Mandatory Settlement Conferences. The project includes a volunteer component, as well as bi-lingual (Spanish/English) services.	\$ 50,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Justice & Diversity Center of the Bar Association of San Francisco	Shriver - SASH Self-Help	San Francisco ☐	Returning	This project provides legal information, legal representation, and social services to litigants involved in custody disputes. Information and assistance is provided in English and Spanish to low-income SRLs filing paperwork for child custody and visitation matters, as well as facilitates settlement efforts.	\$ 70,000
LACBA Counsel for Justice	Domestic Violence Legal Services Project	Los Angeles ☐	Returning	This project uses volunteers and technology to handle increasing numbers of DV-TRO requests, with new computer stations for litigants and full-time paralegal assistance. Pro per litigants will watch an educational video, and project staff and volunteer attorneys will be available to assist and answer questions.	\$ 91,000
Legal Access Alameda (formerly known as Alameda County Bar Association Volunteer Legal Services Corporation)	Family Law Day of Court Program	Alameda ☐	Returning	This project supports litigants on the self-represented litigant Request For Order calendars at the Hayward Hall of Justice. Volunteer attorneys, under staff supervision, take referrals from the bench to prepare Findings and Orders After Hearing.	\$ 30,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Legal Access Alameda	Family Law Status Conference Project	Alameda ☐	Returning	This project will support self-represented litigants appearing at Family Law Status Conference calendars, using Self-Help Center staff, VLSC staff, and volunteers to help self-represented litigants understand the dissolution process and to complete necessary forms.	\$ 65,000
Legal Aid Foundation of Los Angeles	2020 - Torrance Self-Help Center	Los Angeles ☐	New	LAFLA's Self-Help Legal Access Center at the Torrance Courthouse will provide over 10,000 self-represented litigants with forms completion and legal information assistance in marriage dissolution & paternity cases from petition to judgment, as well as domestic violence, civil harassment and elder abuse restraining orders. Litigants are assisted both through workshops and on an individual basis.	\$ 100,000
Legal Aid Foundation of Santa Barbara County	Legal Resource Center Partnership	Santa Barbara ☐	New	Under this proposal, the Legal Aid Foundation of Santa Barbara County will hire a full-time, bilingual, self-help attorney to provide services to self-represented litigants at the Legal Resource Centers at both the Lompoc and Santa Barbara Superior Court.	\$ 110,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Legal Aid of Marin	Community Court Expansion	Marin	Returning	The Marin Community Court (MCC) project's goal is to assist homeless and/or impoverished Marin County residents to resolve fines and resulting license suspensions, expanding Community Court intakes to facilitate identification and resolution of underlying legal issues; and to enhance evaluation of the project's impact.	\$ 80,000
Legal Aid Society of San Bernardino	Caregivers Accessing Justice	San Bernardino	Returning	This project will assist Pro Se litigants on Probate Guardianship and Conservatorship cases through a supportive clinic offered six hours per day, four days per week, within the San Bernardino Justice Center. Services will be available in English and Spanish.	\$ 85,000
Legal Aid Society of San Diego	Name Change & Gender Change Self-Help Clinic	San Diego ☐	Returning	This project helps indigent, self-represented litigants in need of a name and/or gender change with facilitator-like one-on-one assistance including document preparation and information on the court process.	\$ 85,000
Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion Project	San Diego ☐	Returning	This project serves indigent, self-represented Unlawful Detainer litigants with daily, walk-in, emergency one-on-one assistance to both plaintiffs and defendants.	\$ 80,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	Alameda☐	Returning	This project will provide legal assistance to low income, pro per litigants in all aspects of guardianship cases including temporary petitions, general petitions, objections, adding or removing co-guardians, petitions for visitation and petitions for termination, with weekly workshops to assist with the filing requirements, and day of court assistance twice a month when the pro per cases are calendared.	\$ 50,000
Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	Alameda☐	New	This project assists low income self-represented litigants prepare and pursue limited conservatorships, including procedural requirements for both temporary and general petitions, and developing new sample documents and instructions to assist with local rules and procedures.	\$ 60,000
Legal Services of Northern California	Mother Lode Pro Per Project	Amador, Calaveras, El Dorado, Nevada, Placer, Sierra☐	Returning	The Mother Lode Pro Per Project (MLPPP) serves a rural area where isolation and lack of alternate resources amplify the need for these services. An attorney and a paralegal ride a six-county circuit to assist in all areas of civil law, including document preparation, court filings, and small claims. Consumers are seen without appointments at weekly legal clinics throughout the counties.	\$ 98,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Legal Services of Northern California	Small Claims, Guardianship, and Shriver Housing Court Self-Help Project	Yolo	Returning	This project provides assistance to low-income persons in small claims, guardianship, and unlawful detainer cases, including forms assistance and guidance.	\$ 85,000
Los Angeles Center for Law and Justice	Family Law Information for Parents Project	Los Angeles	Returning	This project provides legal information, psychoeducation, and supportive-service referrals to self-represented litigants in custody cases, targeting litigants ineligible for or otherwise unable to benefit from LACLJ's state-funded Shriver Custody Project.	\$ 90,000
Neighborhood Legal Services	Pasadena Unlawful Detainer Assistance Project	Los Angeles	Returning	This project provides document preparation and review assistance to self-represented litigants with family and unlawful detainer cases and also with Hague convention service matters.	\$ 50,000
Neighborhood Legal Services	Chatsworth Self-Help Legal Access Center	Los Angeles	Returning	This project will help self-represented litigants in family law, unlawful detainer, consumer and other civil matters. Additional plans include exploration of remote services which could expand self-help services for this very large county.	\$ 75,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Neighborhood Legal Services	Shriver LA Self Help Center	Los Angeles	Returning	This project provides referrals, information, education and assistance with preparation of legal documents to litigants involved in the unlawful detainer process. Landlord or Tenant-oriented workshop sessions will be facilitated by an experienced advocate and include step-by-step instructions, informational guides, as well as trial preparation workshops .	\$ 90,000
Public Counsel	Guardianship Clinic	Los Angeles	Returning	This clinic provides brief counsel, advice, and referrals to pro per litigants seeking guardianships or other actions in the probate court, with information probate issues, subject matter screening, needs assessments, review of pleadings, advice on appearing in court; and assistance in completing forms.	\$ 30,000
Public Law Center	De Facto & Adoptive Parent Assistance Project	Orange	New	This project will support de facto parents in Juvenile Court proceedings potentially leading to adoptions, so de facto parents have the information they need at Dependency Court termination of parental rights proceedings, including by helping them find pro bono counsel if needed.	\$ 50,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Public Law Center	Orange County Courthouse Guardianship Clinic	Orange	Returning	This clinic helps pro pers with guardianship proceedings through pro bono attorneys, focusing on emerging and critical needs of undocumented persons with minor U.S. citizen or LPR children, by providing legal information and forms assistance, and "Know Your Rights" presentations and materials for community leaders and members.	\$ 60,000
Riverside Legal Aid	Small Estate Assistance Program	Riverside	Returning	These clinics assist unrepresented, low-income litigants with probate administration and summary proceedings and answer general questions relating to decedents' estates, including assistance with pleadings and forms, procedural and legal information on family allowances, probate homestead, and family set aside proceedings, as well as monthly probate accounting workshops.	\$ 105,000
San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	San Diego	Returning	This project assists domestic violence and elder abuse survivors with obtaining legal protection and referrals for counseling, shelter, support, and ongoing legal services as appropriate. SDVLP staff and volunteers provide legal advice and forms completion assistance.	\$ 100,000

**Attachment A5: Highlights of Recommended 2020 Partnership Grant Projects
2020 PARTNERSHIP GRANT RECOMMENDATIONS**

ORGANIZATION	PROJECT TITLE	COUNTY OR COUNTIES SERVED	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Santa Clara University Alexander Law Center	Consumer Debt Clinic	Santa Clara	Returning	This project serves low-income self-represented debt collection defense litigants, with educational workshops on consumer rights and responsibilities; and legal advice to individuals who require assistance for problems that have already arisen in consumer transactions.	\$ 60,000
				Total:	\$ 2,666,000

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 «ProgramPPAddress» (“Recipient”).

RECITALS

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”).

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 (collectively, including the Application for Funding, “Application Materials”).

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 under the Program and the Fund for the period commencing on January 1, «GrantYear» and ending on December 31, «GrantYear» (“Grant Period”).

The governing board, the officers, and similarly empowered staff of Recipient have read and understand the Act, Budget Act, Rules, Application Materials, Legal Service Trust Fund Eligibility Guidelines (“Eligibility Guidelines”), and the Legal Services Trust Fund Program General Grant Provisions (“Grant Provisions”). Recipient has familiarized appropriate staff with the requirements of the Act, the Rules, the Grant Provisions, and the Application Materials.

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 Act, Budget Act, Fee Schedule Act, Rules, Grant Provisions, Eligibility Guidelines, and Application Materials, including any additions or amendments made to the Application Materials by 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,

Program Name and Number: «ProgramNumber»

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.

3. 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 a financial statement that has been audited or reviewed by a certified public accountant within ninety (90) days of the close of Recipient's fiscal year.
4. 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.
5. Notwithstanding the Grant Provisions or any other provision of this Agreement regarding the payment of grants, 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.
6. Recipient must spend funds received in connection with the Program and Fund in each county served in the amounts set forth in Attachment A – Grant Allocation Detail, which attached hereto and incorporated herein by reference.
7. Recipient represents and warrants that Recipient's Application Materials for a grant under the Program and Fund does not misstate or omit any material fact in the Application Materials. Recipient will notify the State Bar promptly (but in no event more than three (3) business days) in writing of any change in any material fact affecting Recipient's eligibility to receive funds under the Program and Fund, including without limitation, any change that affects the accuracy of any statement made in conjunction with Recipient's application for a grant under the Program and Fund. Recipient will also notify the State Bar promptly (but in no event more than three (3) business days) in writing of any material change in the planned activities or proposed budget contained in the Application Materials or any revision thereto.
8. In support of the State Bar's obligation to the Judicial Council to ensure full participation by Program recipients in maintaining and using statewide on-line resources for legal advocates and consumers of legal services, Recipient will:
 - a) Ensure that, during the Grant Period, Recipient is accurately identified on the statewide legal services websites, including, as appropriate, in the:
 - i. Client referral directory on LawHelpCalifornia.org;
 - ii. Legal Services Directories (support center and field program directories); and
 - iii. *Pro Bono* Programs Guide on CaliforniaProBono.org;

Program Name and Number: «ProgramNumber»

- b) Include information about LawHelpCalifornia.org and CALegalAdvocates.org in trainings for new staff advocates, circulate information received from state coordinators about these sites to appropriate staff members, encourage staff to join the CALegalAdvocate.org site, and must encourage participation in brief trainings about the sites as available; and
 - c) Provide a link to LawHelpCalifornia.org on its own program website.
9. Recipient will permit the State Bar's agents to inspect at any time any office or other premises maintained by Recipient or used by Recipient in connection with the expenditure of the Grant Amount received under the Program. Recipient will cooperate with the State Bar's agents during such inspections and will furnish the agents with any information that the agents reasonably request as relevant to determining Recipient's compliance with this Agreement. The State Bar's right of access to Recipient's records for purposes of compliance will survive the expiration of the Grant Period. In complying with disclosure requirements of this Agreement and of the Program and Fund, Recipient may withhold any client-identifying information when Recipient reasonably determines that disclosure would violate the Act, the Rules, or a rule of professional responsibility.
 10. 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 will 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 9 above.
 11. (a) 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.
 - (b) 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; and (ii) claims by any person, firm, or corporation for injury or damage by Recipient or Recipient's agents in connection with the provision of legal services pursuant to this Agreement. Recipient shall further defend, indemnify, and hold harmless the State Bar from and against all liabilities, losses, damages, expenses, or costs, whatsoever (including reasonable attorneys' fees, costs, and expenses), arising from or in connection with the State Bar's enforcement of its rights under this Section 11(b). This indemnity provision shall survive the termination or expiration of this Agreement.

Program Name and Number: «ProgramNumber»

(c) Recipient will use reasonable efforts to have the State Bar named as an insured party to any liability insurance policies purchased by or for Recipient and shall provide the State Bar with these certificates of insurance.

12. 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.

13. (a) All notices given in connection with the terms of this Agreement will be in writing, and both emailed and delivered personally or by first-class, certified, registered, or overnight mail addressed to the parties at the addresses stated below:

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

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

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

Attention: «PrimaryContactName»
«PrimaryContactJobTitle»

Changes in address for purposes of giving notice will be effective two (2) weeks after giving notice of the change in address.

(b) This Agreement, together with the Application Materials, Rules, Grant Provisions, Eligibility Guidelines, and Directives, 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. This Agreement shall be binding upon agents and successors of both parties. No alteration of the terms of this Agreement will be valid or effective unless in writing and executed by each party.

(c) This Agreement was made and entered into by the parties in the State of California and shall be construed according to the laws of that state. 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.

(d) Each party 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.

Program Name and Number: «ProgramNumber»

- (e) 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 a 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.
- (f) This Agreement may be executed in any number of counterparts, each of which will be deemed to be an original, and all of which, together will constitute but one and the same instrument. Delivery of an executed counterpart of this Agreement by facsimile, email or any other reliable means will be effective for all purposes as delivery of a manually executed original counterpart. Either party may maintain a copy of this Agreement in electronic form. The parties further agree that a copy produced from the delivered counterpart or electronic form by any reliable means (for example, photocopy, facsimile, or printed image) will in all respects be considered an original.

By executing this Agreement below, the parties agree to its terms.

Date:

THE STATE BAR OF CALIFORNIA

Date:

RECIPIENT

By:

Print Name and Title of State Bar
Executive Officer

By:

Print Name of Executive Director

By:

Print Name and 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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Program Name and Number: «ProgramNumber»

GRANT AGREEMENT

THE STATE BAR OF CALIFORNIA

OFFICE OF ACCESS & INCLUSION - EQUAL ACCESS FUND PARTNERSHIP 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”).

RECITALS

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”).

Recipient has completed, executed, and submitted to the State Bar a Proposal for a Partnership Grant pursuant to the Request for Proposals for Partnership Grants issued by the Program. As part of the Proposal for Partnership Grants, Recipient has completed, executed, and submitted to State Bar, Assurances, Attachments, and a Proposed Budget (collectively, “Proposal Materials”).

In reliance upon the representations and agreements made in the Proposal Materials, the State Bar has determined to award Recipient a Partnership Grant for the period commencing on January 1, «GrantYear» and ending on December 31, «GrantYear» (“Grant Period”).

The governing board, the officers, and similarly empowered staff of Recipient have read and understand the Act, Budget Act, Rules, the Proposal Materials, and the Legal Services Trust Fund Program General Grant Provisions (“Grant Provisions”). Recipient has familiarized appropriate staff with the requirements of the Act, Budget Act, Rules, the Grant Provisions, and the Proposal Materials.

AGREEMENTS

1. Pursuant to requirements of the Program and Fund and in reliance upon the promises and representations made by Recipient, the State Bar grants to Recipient «FinalEAFGrantAllocation» (“Grant Amount”) for the «ProjectTitle».
2. The Act, Budget Act, Rules, Grant Provisions, and Proposal Materials, including any additions or amendments made to the Proposal Materials by 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, Rules, Grant Provisions, Assurances, and other agreements made in the Proposal Materials. Recipient agrees to comply with all lawful statutes, rules, regulations, guidelines, policies, instructions, and

Program Name and Number: «ProgramNumber»

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.

3. The State Bar will pay the Grant Amount within ninety (90) days after execution of this Agreement. However, under no circumstances will the State Bar bear any liability to Recipient or to other persons or entities for delays in payments.
4. Notwithstanding the Grant Provisions, or any other provision of the entire agreement regarding the payment of grants, 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 the Uniform Civil Fees and Standard Fee Schedule Act, and are contingent upon the availability and sufficiency of such funds, as determined solely by the State Bar. Consequently, Recipient shall not be guaranteed any specific dollar amount in grant funds, or any grant funds at all, if funds received pursuant to the Budget Act and the Uniform Civil Fees and Standard Fee Schedule Act are insufficient or unavailable to the State Bar. This Agreement shall terminate automatically if state funding becomes unavailable. The State Bar shall 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.
5. Recipient agrees to submit financial and program activity reports to the State Bar as requested, to provide the State Bar with copies of any materials produced with grant funds, and to cooperate with the State Bar in evaluating the results of this grant. Recipient understands that any funds not expended during the grant period may not be carried over into the following year. However, if in the final year of Partnership Grant funding for a project, Recipient is unable to spend down grant funds for that period, Recipient may request a one hundred and eighty (180)-day carryover into the subsequent year. The opportunity to request a one-time carryover only applies if Recipient is not reapplying for subsequent funding for that project. Approval of a request for a one hundred and eighty (180)-day carryover will be at the sole discretion of the State Bar. Recipient agrees to submit to the State Bar a written Memorandum of Understanding ("MOU") with the Cooperating Court(s) regarding the areas of cooperation set forth in the Proposal Materials. Recipient agrees to notify the State Bar immediately of any and all amendments to the terms of the MOU, and advise the State Bar of any change in circumstance, including termination or expiration of the MOU.
6. Recipient represents and warrants that Recipient's Proposal Materials for a grant under the Program and Fund does not misstate or omit any material fact in the Proposal Materials. Recipient will notify the State Bar promptly (but in no event more than three (3) business days) in writing of any change in any material fact affecting Recipient's eligibility to receive funds under the Program and Fund, including, without limitation, any change that affects the accuracy of any statement made in conjunction with Recipient's application for a grant under the Program and Fund. Recipient will also notify the State Bar promptly (but in no event more than three (3) business days) in writing of any material change in the planned activities or proposed budget contained in the Proposal Materials or any revision thereto.
7. For all publications produced with funding under the Program and Fund, Recipient hereby assigns to the State Bar a royalty-free, nonexclusive, irrevocable, world-wide right and license to reproduce, publish, display, distribute, and use these materials. Recipient also hereby assigns to the State Bar a royalty-free, nonexclusive, and irrevocable right to

Program Name and Number: «ProgramNumber»

authorize qualified legal services projects, support centers, and courts to use these materials.

8. Recipient will permit the State Bar's agents to inspect at any time any office or other premises maintained by Recipient or used by Recipient in connection with the expenditure of funds received under the Program. Recipient will cooperate with the State Bar's agents during such inspections and will furnish the agents with any information that the agents reasonably request as relevant to determining Recipient's compliance with this Agreement. The State Bar's right of access to Recipient's records for purposes of compliance will survive the expiration of the Grant Period. In complying with disclosure requirements of this Agreement and of the Program and Fund, Recipient may withhold any client-identifying information when Recipient reasonably determines that disclosure would violate the Act, the Rules, or a rule of professional responsibility.
9. The Act, Budget Act, Rules, Grant Provisions, and Directives set forth requirements concerning use of Program funds and payment for subcontractors 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 Service 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 will 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 8 above.
10. (a) 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.

(b) Recipient agrees to indemnify, defend, and hold harmless the 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; and (ii) claims by any person, firm, or corporation for injury or damage by Recipient or Recipient's agents in connection with the provision of services pursuant to this Agreement. Recipient shall further defend, indemnify, and hold harmless the State Bar from and against all liabilities, losses, damages, expenses, or costs, whatsoever (including reasonable attorneys' fees, costs, and expenses), arising from or in connection with the State Bar's enforcement of its rights under this Section 10(b). This indemnity provision shall survive the termination or expiration of this Agreement.

(c) Recipient will use reasonable efforts to have State Bar named as an insured party to any liability insurance policies purchased by or for Recipient and shall provide the State Bar with these certificates of insurance.
11. This Agreement does not impose on State Bar any obligation to provide Recipient funds in excess of the Grant Amount or beyond the end of the Grant Period.

Program Name and Number: «ProgramNumber»

12. (a) All notices given in connection with the terms of this Agreement will 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 94105-1617

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

Recipient: «ProgramLegalName»
«Address1»
«Address2»
«City», «State» «ZipCode»
[add primary contact email address]

Attention: «PrimaryContactName»
«PrimaryContactJobTitle»

Changes in address for purposes of giving notice will be effective two (2) weeks after giving notice of the change in address.

- (b) This Agreement, together with the Proposal Materials, Rules, Grant Provisions, and Directives, contains and constitutes the entire agreement between State Bar and Recipient regarding the State Bar's grant of a Partnership Grant to Recipient and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement shall be binding upon agents and successors of both parties. No alteration of the terms of this Agreement will be valid or effective unless in writing and executed by each party.
- (c) This Agreement was made and entered into by the parties in the State of California and shall be construed according to the laws of that state. 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.
- (d) Each party 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.
- (e) 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 a 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

Program Name and Number: «ProgramNumber»

executed by the Executive Director of the State Bar or the Executive Director's designee.

- (f) This Agreement may be executed in any number of counterparts, each of which will be deemed to be an original, and all of which, together will constitute but one and the same instrument. Delivery of an executed counterpart of this Agreement by facsimile, email or any other reliable means will be effective for all purposes as delivery of a manually executed original counterpart. Either party may maintain a copy of this Agreement in electronic form. The parties further agree that a copy produced from the delivered counterpart or electronic form by any reliable means (for example, photocopy, facsimile, or printed image) will in all respects be considered an original.

By executing this Agreement below, the parties agree to its terms.

Date:

THE STATE BAR OF CALIFORNIA

Date:

RECIPIENT

By:

Print Name and Title of State Bar
Executive Officer

By:

Print Name of Executive Director

By:

Print Name and Title of Board Officer