



JUDICIAL COUNCIL OF CALIFORNIA

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REPORT TO THE JUDICIAL COUNCIL

Item No.: 22-156

For business meeting on: September 20, 2022

Title

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

Agenda Item Type

Action Required

Effective Date

September 20, 2022

Rules, Forms, Standards, or Statutes Affected

None

Date of Report

August 31, 2022

Recommended by

State Bar Legal Services Trust Fund
Commission
Richard G. Reinis, Cochair
Kim Savage, Cochair

Contact

Melanie Snider, 916-263-5442
melanie.snider@jud.ca.gov

Executive Summary

The Budget Act of 2022 includes \$40,874,000 in the Equal Access Fund for general distribution to legal services providers and support centers. The Legal Services Trust Fund Commission recommends allocating the funds to the State Bar of California for distribution in accordance with the Budget Act: 90 percent to legal services agencies through the IOLTA (Interest on Lawyers' Trust Accounts)-formula grants, and 10 percent for partnership grant awards. In accordance with the Budget Act, the Judicial Council and the State Bar will also reserve approximately 3 percent of the total for administration. These amounts are contingent on filing fee income received for fiscal year 2022–23, which constitutes approximately 13 percent of this allocation. 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 20, 2022, approve:

1. The distribution of \$31,506,480 in IOLTA–formula grants for fiscal year (FY) 2022–23 according to the terms of the state Budget Act;
2. The distribution of \$3,500,720 in Equal Access Fund partnership grants to legal services agencies for programs conducted jointly with courts to provide legal assistance to self-represented litigants; and
3. The commission’s determination that the proposed budget of each individual grant complies with statutory and other guidelines.

Relevant Previous Council Action

The Judicial Council has approved the proposed distribution of partnership grants and IOLTA-formula funds for each of the past 22 years based on the recommendations of the Legal Services Trust Fund Commission.

Analysis/Rationale

Since 1999, the state Budget Act has contained a provision for the allotment of \$10 million to an Equal Access Fund “to improve equal access and the fair administration of justice.” In 2018, an additional ongoing \$10 million was added to the fund. In 2019, the Equal Access Fund allocation increased to \$45 million, with one-time \$20 million of that allocation earmarked for homelessness prevention projects. The Equal Access Fund allocation for legal services not restricted to any case type was increased in 2021 to \$65 million and in 2022 is \$35 million.

The 2022 Budget Act¹ 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....”

The Chief Justice, as chair of the Judicial Council, appoints 10 of the voting members to the commission, of which three must be nonvoting judicial advisors. The three nonvoting judicial advisors must be comprised of two superior court judges and one appellate justice. Relevant portions of the Budget Act are in the commission’s report (Attachment B), at pages 20–21. The membership roster is in the commission’s report at pages 18–19.

There are two grant programs, IOLTA-formula and partnership grants. The Budget Act provides that 90 percent of the funds be distributed to legal services agencies according to a statutory

¹ Budget Act of 2022 (Assem. Bill 178 (Ting)), https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202120220AB178.

formula set out in Business and Professions Code section 6216² (the IOLTA-formula grants). The formula distributes funds between qualified legal services agencies based upon the poverty population in the county and 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 the principal means of delivering legal services share an additional pro bono allocation and Support Centers that provide technical and legal assistance to the legal services agencies receive 15% of the funds.

The remaining 10 percent of the funds are to be distributed as partnership grants to legal services programs for projects conducted jointly with the courts to provide legal assistance to self-represented litigants. The competitive process for soliciting, reviewing, and selecting the legal services programs to receive these partnership grants is set out in the commission's report at pages 10–11. The commission did not receive applications for the full amount of funding available, and after extensive committee review recommends that the difference between the recommended awards and amount available in the Budget Act be retained as reserve funds used to cover shortfalls in filing fee projections.

For the grant period funded by the 2022 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 allocation approved is \$31,506,480. This is less than the total allocation specified in the Budget Act. The difference is due to the possibility that filing fee revenue will not fund the entire allocation specified in the Budget Act. Any revenue exceeding the allocation approved for distribution will be held by the State Bar for allocation in FY 2023–24.

The commission has also approved a schedule for allocation for the Partnership Grants of \$2,786,034 (Attachment A). This schedule is \$1,185,556 less than the total allocation of \$3,971,590 specified in the Budget Act. Similarly, this difference between distribution and allocation is based on a conservative estimate of filing fee revenues. Any revenue exceeding the allocation approved for distribution will be held by the State Bar for allocation in FY 2023–24.

The computation of funds to reserve for administration is somewhat complicated and based upon two sections of the Budget Act. The Equal Access General Fund (Section 3, Schedule 7) allows a 2.5 percent allocation for administration, while the Equal Access Trial Court Trust Fund (Section 4, Schedule 5) allows a 5 percent allocation. Using this computation, a total of \$1,158,900 or 2.8 percent of the total allocation specified in the Budget Act is reserved for administration by the State Bar and the Judicial Council.

² Bus. & Prof. Code, § 6216,
https://leginfo.ca.gov/faces/codes_displayText.xhtml?lawCode=BPC&division=3.&title=&part=&chapter=4.&article=14.

Distributing the funds to the commission will allow it to carry out the terms of the Budget Act and will put the monies of the Equal Access Fund into the hands of legal services providers to supply legal assistance to self-represented litigants. Grants are to be distributed on a calendar-year basis beginning January 1, 2023.

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.

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

Attachments and Links

1. Attachment A: Partnership Grant Awards for Fiscal Year 2022–23
2. Attachment B: *Equal Access Fund: Distribution of Funds for Partnership Grants and IOLTA-Formula Grants under the Budget Act of 2022*

Attachment A: Partnership Grant Awards for Fiscal Year 2022–23

a. Los Angeles County Bar Association	
Domestic Violence Legal Services Project (DVP)	\$104,000
b. Legal Aid Society of San Bernardino	
CSEAJ-Probate Partners	\$159,034
c. Neighborhood Legal Services	
Pomona-Ready for Trial!	\$120,000
d. California Rural Legal Assistance, Inc.	
San Joaquin County Housing Helpline Court Clinic Partnership	\$132,000
e. Neighborhood Legal Services	
San Gabriel Valley-Remote Services-Housing.....	\$124,000
f. Legal Access Alameda	
Family Law Status Conference Clinic	\$65,000
g. Legal Aid Society of San Diego	
South Bay Restraining Order Project.....	\$120,000
h. Bet Tzedek Legal Services	
Remote Pro Se Technology Initiative	\$120,000
i. Justice & Diversity Center of the Bar Association of San Francisco	
Family Law Assisted Self-Help Project (FLASH)	\$70,000
j. Legal Services of Northern California	
Yolo Consumer Clinic	\$39,000
k. Community Legal Aid SoCal	
Norwalk Consumer Debt Series.....	\$34,000
l. Legal Aid Foundation of Los Angeles	
Torrance Self-Help Partnership Grant	\$100,000
m. Community Legal Aid SoCal	
Compton Self-Help Economic Expansion Project.....	\$91,000
n. San Diego Volunteer Lawyer Program	
Central Division Restraining Order Clinic	\$130,000
o. Senior Citizens Legal Services	
Indigent Landlord/Tenant Services and Mediation.....	\$105,000
p. Legal Aid of Marin	
Homelessness Prevention Through Mandatory Settlement Conferences ...	\$80,000
q. Legal Aid Foundation of Santa Barbara County	
Legal Resource Center (LRC) Partnership	\$138,000

r. Public Law Center	
DeFacto and Adoptive Parent Assistance Project.....	\$50,000
s. Elder Law & Advocacy	
Imperial County Elder Abuse Technology Project.....	\$105,000
t. Bet Tzedek Legal Services	
Decedent Estate Self-Help Clinic	\$150,000
u. Neighborhood Legal Services	
Stabilizing Families Project	\$105,000
v. Community Legal Aid of SoCal	
Orange County Consumer Debt Series	\$69,000
w. Legal Aid Society of San Diego	
Name and Gender Change Self-Help Clinic	\$85,000
x. Legal Assistance for Seniors	
Partnership to Assist Limited Conservatorship Litigants	\$50,000
y. Inland Counties Legal Services	
Consumer Rights Clinic Expansion	\$151,000
z. Neighborhood Legal Services	
Pasadena-Continuum of Services	\$115,000
aa. Legal Access Alameda	
Family Law Day of Court	\$25,000
bb. Family Violence Law Center	
Domestic Violence Pro Per (DVPP) Project.....	\$25,000
cc. Legal Assistance for Seniors	
Partnership to Assist Guardianship Litigants.....	\$55,000
dd. Central California Legal Services	
Guardianship Project.....	\$70,000
ee. Riverside Legal Aid	
Small Estates/Probate 2023.....	\$110,000



The State Bar of California

ATTACHMENT A to the report: Equal Access Fund: Distribution of Funds for Partnership Grants and IOLTA-Formula Grants under the Budget Act of 2022

DATE: August 30, 2022

TO: The Judicial Council of California

FROM: Doan Nguyen, Program Director, Office of Access & Inclusion
Elizabeth Hom, Program Director, Office of Access & Inclusion

CC: Richard Reinis, Co-Chair, Legal Services Trust Fund Commission
Kim Savage, 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 2022

EXECUTIVE SUMMARY

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

The purpose of this memo is to provide an overview of the EAF grants administered on behalf of the Judicial Council by the Legal Services Trust Fund Commission and the State Bar in 2022. The State Bar also requests that the Judicial Council approve a distribution of \$38,047,067 for the 2023 EAF IOLTA-formula Grants and Partnership Grants authorized by the Budget Act of 2022, which will be administered in the 2023 calendar year, and EAF reserves. This distribution amount includes:

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

(2) \$689,867 for administrative costs¹ to the State Bar pursuant to the Budget Act.

(3) The remaining \$2,350,000 of filing fees will be retained as EAF reserve funds, used to cover any future disbursements delays or shortfalls in filing fee projections

BACKGROUND

In 1999, the State Budget Act established the Equal Access Fund (EAF) in the judicial branch budget to provide grants for free legal assistance to indigent Californians. The Budget Act identifies two separate uses for the money appropriated to the EAF:

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

These grants are administered through the Legal Services Trust Fund Commission of the State Bar of California (see Attachment A1), but recommendations for the distribution of the grant funds must be approved by the Judicial Council. Relevant portions of the Budget Act of 2022 are included in Attachment A2.

The initial appropriation for the EAF in 1999 was \$10 million. This amount has since been increased with the addition of State Appropriation Limit (SAL) funding for a few years, filing fee revenue,² and in more recent years, the appropriation of additional general fund monies.³ In 2022, the Legislature maintained its baseline appropriation of \$35 million for the EAF general fund, but included an additional \$15 million for consumer debt legal assistance and \$30 million for homelessness prevention funding.

THE LEGAL SERVICES TRUST FUND PROGRAM

Eligibility for EAF IOLTA-Formula Grants

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

¹ Pursuant to the Budget Act, the Judicial Council receives one-third of the administrative costs allocation, estimated at \$344,933 for the 2023 distribution year.

² Since 2006, the Budget Act has allocated \$4.80 from first paper filing fees to the Equal Access Fund, with 90 percent of these funds directed to IOLTA-Formula grants and 10 percent reserved for Partnership Grants.

³ In 2016, the EAF general fund was increased by \$5 million to \$10,392,000. In 2017, it was increased by an additional \$5 million to \$20,392,000. In 2019 the Legislature also provided an increase of \$20 million to fund homelessness prevention activities. In 2021, the Legislature increased the appropriations by \$50 million, \$45 million of which was distributed through the Legal Services Trust Fund Commission, and further included \$40 million for additional homelessness prevention activities.

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

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

All legal services projects and support centers receiving IOLTA and EAF funding must be nonprofit corporations, maintain quality control procedures approved by the Commission, and meet minimum funding and service criteria that are set out in Business and Professions Code sections 6214-6215. Business and Professions Code sections 6210-6228 (referred to as the IOLTA statute) require recipient legal services projects to use these grants to provide free civil legal services to indigent persons in the counties for which the funds are allocated. In addition, legal services projects must make extra efforts to increase services to especially disadvantaged and underserved client groups. Recipient support centers must publicize the availability of their services and demonstrate that they actually provide legal support without charge to qualified legal services projects on a statewide basis.⁴

Administration and Oversight

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

Staff reviews all applications to confirm eligibility and compliance with governing authorities. Complex eligibility issues are reviewed and addressed by the Commission’s Eligibility & Budget Review Committee. The Commission then makes a determination of eligibility and allocation of IOLTA-formula grant amounts. Once determined eligible, applicants are required to submit a proposed budget for use of the allocated funds, with a narrative description of the services to be provided and how the efficacy and impact of those services will be measured and maximized.

The Commission reviews this budget to ensure that it complies with the requirements noted above before any funds are actually distributed. Requirements regarding eligibility and use of funds are reflected in regulating rules and grant conditions approved by the State Bar and are incorporated into a written grant agreement with each grant recipient.

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

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

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

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

Eligibility for Partnership Grants

The Budget Act reserves up to 10 percent of the Equal Access Fund for joint projects of court and legal services programs to make legal assistance available to pro per litigants. Under Business and Professions Code section 6213(a), Partnership Grants are restricted to Qualified Legal Services Projects.

The Budget Act identifies four essential elements for Partnership Grants:

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

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

Administration and Oversight of Partnership Grants

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

Eligibility is confirmed by staff and the Partnership Grants Committee is charged with reviewing all proposals and making tentative funding recommendations to the Commission for final approval by the Judicial Council. Unlike the EAF IOLTA-formula Grants, the Committee is given discretion to make specific funding award recommendations. If allocations are different from requested grant amounts, applicants must submit a revised budget describing how Partnership Grant monies will be used.

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

DISCUSSION

2022 GRANTS ADMINISTRATION

Pursuant to the Judicial Council's approval of recommended EAF grants last year, the State Bar is currently administering the 2022 EAF IOLTA-formula and Partnership Grants.

2022 EAF IOLTA-formula Grants

The approved \$58,147,328 for 2022 IOLTA-Formula Grants provides support to a total of 103 Legal Services Projects and Support Centers. This is the largest distribution of EAF funds to date. To assist grant recipients in planning for services with the funds, grant recipients were permitted to budget over two years instead of one, if desired.

The funds help the most vulnerable Californians when they face critical, life-changing legal issues affecting basic needs, safety, and security. Grantees handle a wide variety of legal issues, including but not limited to elder abuse, domestic violence, family support, housing, and access to health care. Among those served are the working poor, children, people who live in isolated rural areas, veterans, people with limited English proficiency, people suffering abuse, people with disabilities, and the elderly. The statewide pandemic has only exacerbated the severity of

these issues and made the funded legal services that much more valuable. A list of the 2022 grant recipients under the Budget Act of 2021 is included as Attachment A3.⁵

2022 Partnership Grants

The approved \$2,587,400 for the 2022 Partnership Grants provides support for 36 projects from 24 organizations that enhance the ability of unrepresented litigants to pursue justice in civil courts across California. These projects offer services in a variety of substantive areas, including but not limited to, housing, family, guardianship, estate planning, and small claims. In response to the court closures due to the pandemic, most programs have pivoted from initial plans and are currently providing remote and/or hybrid services to litigants. A list of the 2022 Partnership Grant recipients is included as Attachment A4.

Partnership Grants 2.0

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

Applicants were given the option to apply for supplemental funding for an existing 2022 Partnership Grant project and/or complete and submit a new application. In March 2022, the LSTFC recommended funding of \$206,000 for 11 proposals supplementing approved 2022 Partnership Grant projects and \$3,674,237 for 14 new proposals for 2022-2023 Partnership Grant funding. The grants administration period for the supplemental PG 2.0 projects is April 1, 2022, to December 31, 2022 (9 months), whereas the period for new PG 2.0 projects is April 1, 2022, to December 31, 2023 (21 months). A list of the Partnership Grant 2.0 recipients is included in Attachment A5.

2023 GRANTS ADMINISTRATION

2023 EAF IOLTA-formula Grants

The 2023 EAF IOLTA-formula grant applications were released on April 4, 2022 and due on May 16, 2022. From May through July, State Bar staff and the Eligibility & Budget Review Committee reviewed applications to determine if applicants (1) meet primary purpose; (2) have identified appropriate qualified expenditures; and (3) have adequate quality controls in place, as determined by the State Bar, to ensure proper oversight and service.

⁵ After being found eligible, one legal services project, Chapman University Family Protection Clinic, declined its 2022 grant award. The funding for that organization will be rolled into the 2023 distribution.

The State Bar received 108 applications for funding for grant year 2023. There were 100 renewal applications and eight new applications for funding. Two new applicants subsequently withdrew, leaving six new applicants. The Commission met on August 12, 2022 and approved funding for 103 qualified legal services providers and support centers. The State Bar then calculated the grant award for each program based on funds available for EAF IOLTA-formula Grants under the Budget Act of 2022. Staff notified the organizations of their grant award and requested a program budget. Proposed budgets will be reviewed by State Bar staff to ensure grantee compliance with the statute, rules and guidelines, prior to distribution of grant funds. Proposed budgets will be presented to the Commission for approval at its November 16, 2022 meeting. Attachment A6 is a standard version of the grant agreements used for 2022 grants; we do not anticipate any substantive changes to the 2023 grant agreement.

The total estimated amount for 2023 EAF IOLTA-formula grants is \$31,506,480. Attachment A7 includes a list of 2023 EAF -IOLTA recipients.

2023 Partnership Grants

Request for Proposals for the Partnership Grant was released on January 28, 2022 and due on March 18, 2022.

Similar to its 2022 application process, the 2023 Partnership Grants application implemented of a formal scoring rubric with the goals of providing transparency to applicants, clarity to Committee members, and ensure equity in the review process. The scoring rubric was included in the Request for Proposals (RFP) and the application was updated to align with the rubric categories (Attachment A8). After the RFP was released, the State Bar held an office hours webinar on February 2, 2021, to review the 2023 RFP requirements, scoring rubric, and updates made to the application.

The majority of the 2023 proposed projects are currently funded. Six proposals are seeking funding for new projects and five projects are seeking funding beyond their fifth year. Requested funding amounts for the 2023 Partnership Grant year ranged from \$25,000 to \$159,000. The proposed projects would address seven substantive areas, with a majority of projects providing services in family/domestic violence, housing, and consumer/finance. The proposed projects would also span 14 counties, including rural and densely populated counties throughout California.

Several processes were developed to ensure consistent scoring and interpretation of the rubric categories. Similar to the 2022 Partnership Grants and PG 2.0 review processes, the PG Committee and staff engaged in an initial calibration process to ensure consistency in applying the scoring rubric. This entailed each committee member and staff independently reviewing and scoring three selected proposals for discussion at its April 6, 2022, meeting. The committee discussed outlier scores, reasons for their own scores, and provided general guidance to the review team on how to apply the scoring rubric. Following initial calibration, the review team, comprised of staff and a rotating committee member(s), reviewed and scored the remaining 28 proposals, applying the guidance from the committee. In order to address any scores that did

not reach a consensus on a particular section, the review team took the average of each team member's score in order to calculate a final score for all proposals.

On May 16, 2022, the Committee reviewed all final rubric scores and developed tentative funding recommendations, based on past practice and in consideration of the criteria outlined in the rubric as well as other priority factors such as serving rural counties or substantive areas with anticipated increased need for 2023.

Applicants were provided an opportunity to provide feedback about the potential impact of the tentative funding amount on their proposed project and to ask follow-up questions about the application review process. The Committee confirmed funding recommendations on July 21, 2022. The Commission adopted those recommendations on August 13, 2021 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 2022 meeting.

The total estimated amount available for the 2023 Partnership Grant Awards is \$3,500,720. The Commission requests the Council's approval for the following Partnership Grant awards totaling \$2,786,034. Typically, the total requested amount for Partnership Grants has been in the range of \$2.4 to \$2.6 million. One reason the estimated available amount exceeds the total requested amount is because several grantees applied for and received a new Partnership Grant 2.0. Because of the increased PG 2.0 grant award amounts and extended 21-month grant administration period (April 1, 2022 to December 31, 2023), several grantees did not apply for a 2023 Partnership Grant. The \$714,686 surplus will be added back to the Partnership Grant reserves for future distribution, so that programs have sufficient time to develop and submit project proposals.

Number	Organization	Project Title	County(ies) Served	Recommendation
1	Bet Tzedek Legal Services	Remote Pro Se Technology Initiative	Los Angeles	\$ 120,000
2	Bet Tzedek Legal Services	Decedent Estate Self-Help Clinic	Los Angeles	\$ 150,000
3	California Rural Legal Assistance, Inc.	San Joaquin County Housing Helpline Court Clinic Partnership	San Joaquin	\$ 132,000
4	Central California Legal Services	Guardianship Project	Fresno	\$ 70,000
5	Community Legal Aid SoCal	Norwalk Consumer Debt Series	Los Angeles	\$ 34,000
6	Community Legal Aid SoCal	Orange County Consumer Debt Series	Los Angeles	\$ 69,000
7	Community Legal Aid SoCal	Compton Self-Help Economic Expansion Project Year 2	Orange	\$ 91,000
8	Elder Law & Advocacy	Imperial County Elder Abuse Technology Project	Imperial	\$ 105,000
9	Family Violence Law Center	Domestic Violence Pro Per (DVPP) Project	Alameda	\$ 25,000

10	Inland Counties Legal Services	Consumer Rights Clinic EXPANSION	Riverside, San Bernardino	\$	151,000
11	Justice & Diversity Center of the Bar Association of San Francisco	FLASH	San Francisco	\$	70,000
12	LACBA Counsel for Justice	Domestic Violence Legal Services Project (DVP)	Los Angeles	\$	104,000
13	Legal Access Alameda	Family Law Status Conference Clinic	Alameda	\$	65,000
14	Legal Access Alameda	Family Law Day of Court	Alameda	\$	25,000
15	Legal Aid Foundation of Los Angeles	2023 - Torrance Self Help Partnership Grant	Los Angeles	\$	100,000
16	Legal Aid Foundation of Santa Barbara County	LRC Partnership	Santa Barbara	\$	138,000
17	Legal Aid of Marin	Homelessness Prevention Through Mandatory Settlement Conferences	Marin	\$	80,000
18	Legal Aid Society of San Bernardino	CSEAJ - PROBATE PARTNERSHIP 2023	San Bernardino	\$	159,000
19	Legal Aid Society of San Diego	South Bay Restraining Order Project	San Diego	\$	120,000
20	Legal Aid Society of San Diego	Name Change & Gender Change Self-Help Clinic	San Diego	\$	85,000
21	Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	Alameda	\$	50,000
22	Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	Alameda	\$	55,000
23	Legal Services of Northern California	Yolo Consumer Clinic	Yolo	\$	39,000
24	Neighborhood Legal Services	San Gabriel Valley - Remote Services - Housing	Los Angeles	\$	124,000
25	Neighborhood Legal Services	STABILIZING FAMILIES PROJECT	Los Angeles	\$	105,000
26	Neighborhood Legal Services	POMONA - READY FOR TRIAL!	Los Angeles	\$	120,000
27	Neighborhood Legal Services	PASADENA - CONTINUUM OF SERVICES	Los Angeles	\$	115,000
28	Public Law Center	DeFacto & Adoptive Parent Assistance Project	Orange	\$	50,000
29	San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	San Diego	\$	130,000
30	Senior Citizens Legal Services	Indigent Landlord/Tenant Services and Mediation	Santa Cruz	\$	105,000
TOTAL				\$	2,786,034

Attachment A9 includes a brief summary of each project.

2023 DISTRIBUTION REQUEST TO THE COUNCIL

The State Bar requests an estimated 2023 grant distribution of (1) \$35,697,067 pursuant to the Budget Act of 2022 for EAF IOLTA-formula Grants, Partnership Grants, and costs of administration; and (2) approval of the grants specified below as follows:⁶

2023 EAF IOLTA-Formula Grants – Distribution Request

The State Bar requests that the Judicial Council approve 2023 EAF IOLTA-formula Grants in the amount \$31,506,480, which includes the General Fund Budget Act allocation of \$31,056,480 and projected filing fee revenue of \$450,000.

2023 Partnership Grants – Distribution Request

The State Bar requests a distribution of \$3,500,720 for 2023 Partnership Grants for calendar year 2023, which includes the General Fund Budget Act allocation of \$3,450,720 and projected filing fee revenue of \$50,000.⁷ These discretionary grants are being awarded exclusively to organizations that are eligible for IOLTA funding, after a careful analysis of grant proposals, based on established criteria. Partnership Grants will, upon approval, be distributed as early in 2023 as practicable to projects that have completed the required documentation.

2023 Administrative Allocation

The 2022 Budget Act allocates 2.5 percent for administrative costs for the IOLTA Formula Grants and 5.0 percent for administrative costs from the filing fees. The State Bar requests that the Judicial Council approve a distribution of \$689,867 for administrative costs, which is two-thirds of the total amount. The remaining one-thirds is the Judicial Council's share of administrative costs.

NEXT STEPS

The Budget Act provides that “the Judicial Council shall approve awards made by the 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 estimated 2023 distribution of four equal disbursements for IOLTA-formula Grants to legal services providers determined by the Commission to be in compliance with statutory and other applicable guidelines, eligible grantees are identified in Attachment A7. The funds will be paid out to the eligible legal services programs quarterly (or as close to quarterly as possible depending on contract timing), for the 2022-2023 fiscal year.

⁶ The sum actually allocated as grants may vary from this figure by a negligible amount due to rounding.

The distribution of \$3,500,720 for Partnership Grants, and the approval of the Partnership Grants recommended by the Legal Services Trust Fund Commission as set forth in detail in Attachment A9.

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

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

SUMMARY OF COUNCIL ACTION REQUESTED

The State Bar requests that the Judicial Council approve a distribution of \$38,047,067 to the State Bar pursuant to the Budget Act of 2022. This sum includes:

- (1) \$35,007,200 of funding for Equal Access Fund grants, comprised of a General Fund allocation of \$34,507,200 and additional filing fee revenue of \$500,000 under the Uniform Civil Fees and Standard Fee Schedule Act. By the terms of the Budget Act, \$31,506,480 (90 percent) of these funds is allocated to EAF IOLTA-formula Grants and \$3,500,720 (10 percent) is allocated to Partnership Grants.
- (2) \$689,867 for administrative costs to the State Bar pursuant to the Budget Act.
- (3) The remaining \$2,350,000 of filing fees will be retained as EAF reserve funds, used to cover any future disbursements delays or shortfalls in filing fee projections.

The above requests exclude returned and residuary funding of previously distributed grant funds. There is approximately \$619,458 in residuary Partnership Grants funds, which will be added to the Partnership Grants reserves and distributed during the 2024 or future grant year(s). As of December 31, 2021, the total EAF reserve is \$3,533,055. Since the filing fee revenue is partly based on projections, if there are excess filing fee revenue, the State Bar proposes using these funds to supplement the EAF reserves. Council approval is necessary to enable timely distribution of funds.

ATTACHMENTS LIST

- A1.** 2021-2022 Legal Services Trust Fund Commission Roster

- A2.** Relevant Portions of the 2022 State Budget Act
- A3.** IOLTA-Formula Equal Access Fund Grant Recipients for 2022
- A4.** 2022 Partnership Grant Recipients
- A5.** Partnership Grant 2.0 Recipients
- A6.** Sample Grant Agreement for 2022 IOLTA-Formula Equal Access Fund Grants
- A7.** 2023 EAF IOLTA Eligible Grantees
- A8.** Request for Proposal for 2023 Partnership Grants
- A9.** Summary of 2023 Partnership Grant Proposals

**LEGAL SERVICES TRUST FUND COMMISSION 2021-2022
OPEN ROSTER**

Richard G. Reinis, Co-Chair (2022) Thompson Coburn (State Bar appointee)	Kim Savage, Co-Chair (2022) Law Office of Kim Savage (State Bar appointee)
Christian Schreiber, Co-Vice Chair (2023) Olivier Schreiber & Chao, LLP (State Bar appointee)	Christina S. Vanarelli, Co-Vice Chair (2022) Christina Vanarelli, Inc. APLC (State Bar appointee)
Banafsheh Akhlaghi (2023) NLSCA (Judicial Council appointee)	Amin Al-Sarraf (2024) Locke Lord, LLP (State Bar appointee)
Jeffrey K. Ball (2024) Friendly Hills Bank (State Bar appointee)	Hon. Louise Bayles-Fightmaster (2024) Fightmaster Mediation& Private Judging (Judicial Council appointee)
Pamela M. Bennett (2022) City of Los Angeles, City Attorney's Office (State Bar appointee)	Catherine Blakemore (2022) (State Bar appointee)
Will Boschelli (2023) (State Bar appointee)	Erica Connolly (2022) Office of the California Attorney General (State Bar appointee)

**LEGAL SERVICES TRUST FUND COMMISSION 2021-2022
OPEN ROSTER**

<p>Corey N. Friedman, (2022)</p> <p>The Division of Occupational Safety & Health (Cal/OSHA)</p> <p>(Judicial Council appointee)</p>	<p>Jason B. Galkin (2024)</p> <p>Superior Court of California, County of Nevada</p> <p>(Judicial Council appointee)</p>
<p>J. Eric Isken (2024) Retired</p> <p>(State Bar appointee)</p>	<p>Clifford Klein ()</p> <p>(California Legislature)</p>
<p>Hon. Diana Kruze (Ret.) (2024)</p> <p>(Judicial Council appointee)</p>	<p>Joseph D. Lee (2024)</p> <p>Munger, Tolles & Olson</p> <p>(Judicial Council appointee)</p>
<p>Tammy Mahoney (2024)</p> <p>Luther Burbank Savings</p> <p>(Judicial Council appointee)</p>	<p>Prof. James Meeker (2023)</p> <p>Department of Criminology Law & Society University of California, Irvine</p> <p>(State Bar appointee)</p>
<p><u>ADVISOR</u></p> <p>Hon. Lisa R. Jaskol (2024)</p> <p>Superior Court of California, County of Los Angeles</p> <p>(Judicial Council appointee)</p>	<p><u>ADVISOR</u></p> <p>Hon. Brad Seligman (2024)</p> <p>Superior Court of California, County of Alameda</p> <p>(Judicial Council appointee)</p>
<p><u>LIAISON</u></p> <p>Salena Copeland</p> <p>Legal Aid Association of California (LAAC)</p>	

2021 BUDGET ACT LANGUAGE RELEVANT TO THE EQUAL ACCESS FUND

Senate Bill No. 154

CHAPTER 43

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

Approved by Governor June 27, 2022. Filed with Secretary of State June 27, 2022.

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

[...]

SECTION 0250-101-0001

For local assistance, Judicial Branch.....181,603,000

Schedule:

(1) 0150010-Support for Operation of Trial Courts	78,551,000
(2) 0150051-Child Support Commissioner Program (AB 1058)	59,082,000
(3) 0150055-California Collaborative and Drug Court Projects	5,748,000
(4) 0150075-Grants—Other	18,495,000
(5) 0150083-Equal Access Fund	85,392,000
(6) Reimbursements to 0150051-Child Support Commissioner Program (AB 1058)	-59,082,000
(7) Reimbursements to 0150055-California Collaborative and Drug Court Projects	-4,588,000
(8) Reimbursements to 0150075-Grants—Other	-1,995,000

Provisions:

1. In order to improve equal access and the fair administration of justice, \$35,392,000 of the funds appropriated in Schedule (5) are to be distributed by the Judicial Council through the Legal Services Trust Fund Commission to qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used for legal services in civil matters for indigent persons. The Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. Up to 10 percent of the funds appropriated for purposes of this provision shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and not less than 90 percent of the funds appropriated for purposes of this provision shall be distributed consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. Any funding not allocated for joint projects shall be redistributed consistent with Sections 6216 to 6223, inclusive, of the Business and

Professions Code. The Judicial Council may establish additional reporting or quality control requirements consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code. Of the amount appropriated for purposes of this provision, not more than 1 percent shall be available, upon order of the Department of Finance, for administrative costs of the Judicial Council and the State Bar.

2. In order to improve equal access and the fair administration of justice, \$5,000,000 shall be annually appropriated in Schedule (5) by the Judicial Council to the California Access to Justice Commission for grants to civil legal aid nonprofits, including qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used to support the infrastructure and innovation needs of legal services in civil matters for indigent persons. Of this amount, not more than 1 percent shall be available for administrative costs of the California Access to Justice Commission associated with distributing and monitoring the grants.
3. The California Access to Justice Commission shall make award determinations for grants described in Provision 2. In awarding these grants, preference shall be given to qualified legal aid agencies' proposals that focus on services to rural or underserved immigrant communities regardless of citizenship status and proposals that are innovative or that involve partnership with community-based nonprofits. Any funding not allocated in a given fiscal year shall be reallocated pursuant to Provision 1.
4. The grant process described in Provision 2 shall ensure that any qualified legal service project and support center demonstrates a high need for infrastructure and innovation to ensure that funding is distributed equitably among qualified legal service projects and support centers. The qualified legal service project or support center shall demonstrate that funds received under this provision will not be used to supplant existing resources.
5. The funds described in Provisions 1 and 2 are available for encumbrance or expenditure until June 30, 2024.

SECTION 0250-101-0932

For local assistance, Judicial Branch, payable from the Trial Court Trust Fund.....3,236,930,000

Schedule:

(1) 0150010-Support for Operation of Trial Courts	2,555,989,000
(2) 0150019-Compensation of Superior Court Judges	422,654,000
(3) 0150028-Assigned Judges	30,505,000
(4) 0150037-Court Interpreters	135,502,000
(5) 0150067-Court Appointed Special Advocate (CASA) program	62,713,000

Attachment A2. Relevant Portions of the State Budget Act of 2022

(6) 0150071-Model Self-Help Program	957,000
(7) 0150083-Equal Access Fund	5,482,000
(8) 0150087-Family Law Information Centers	345,000
(9) 0150091-Civil Case Coordination	832,000
(10) 0150095-Expenses on Behalf of the Trial Courts	21,952,000
(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 of the Courts, the Controller shall transfer up to 5 percent of the funding appropriated in Schedule (7) to Item 0250-001-0932 for administrative expenses. Ten percent of the funds remaining after administrative costs shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and 90 percent of the funds remaining after administrative costs shall be distributed, consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. The Judicial Council may establish additional reporting or quality control requirements, consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code.
9. Funds available for expenditure in Schedule (7) may be augmented by order of the Director of Finance by the amount of any additional resources deposited for distribution to the Equal Access Fund Program in accordance with Sections 68085.3 and 68085.4 of the Government Code. Any augmentation under this provision shall be authorized not sooner than 30 days after notification in writing to the chairpersons of the committees in each house of the Legislature that consider appropriations, the chairpersons of the committees and appropriate subcommittees that consider the State Budget, and the Chairperson of the Joint Legislative Budget Committee, or not sooner than whatever lesser time the chairperson of the joint committee, or the chairperson's designee, may determine.

SECTION 0250-162-8506

For local assistance, Judicial Branch, payable from the Coronavirus Fiscal Recovery Fund of 2021
..... **20,000,000**

Schedule:

(2) 0150083-Equal Access Fund20,000,000

Provisions:

1. The funding in Schedule (2) shall be distributed by the Judicial Council through the Legal Services Trust Fund Commission of the State Bar of California pursuant to this provision to qualified legal services projects and support centers to provide eviction defense, other tenant defense assistance in landlord-tenant rental disputes, or services to prevent foreclosure for homeowners, including pre-eviction and eviction legal services, counseling, advice and consultation, mediation, training, renter education, and representation, and legal services to improve habitability, increasing affordable housing, ensuring receipt of eligible income or benefits to improve housing stability, legal help for persons displaced because of domestic violence, and homelessness prevention. Of this amount, no more than 5 percent shall be available, upon order of the Department of Finance, for administrative costs of the Judicial Council and the State Bar of California, provided that funds spent shall not exceed the actual costs of administration. Unspent administrative funds shall be redistributed to qualifying grantees as prescribed by the commission.
2. The remaining funds shall be allocated through a competitive grant process developed by the commission to award grants to qualified legal service projects and support centers to provide eviction defense, other tenant defense assistance in landlord-tenant rental disputes, or services to prevent foreclosures for homeowners, as set forth in Provision 1. 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.
3. Funds appropriated in Schedule (2) are available for encumbrance or expenditure until December 31, 2024.
4. The State Bar of California shall annually provide to the Judicial Council a report that includes funding allocations, annual expenditures, and program outcomes by service area, and service provider for all Equal Access Fund and federal funding. Data shall be reported using the established reporting framework in the Equal Access Program including applicable outcome measures reported in Legal Services standardized reporting, state level performance measures, and main benefits scores. The Judicial Council shall provide the report to the Department of Finance by January 1 of each year for the prior fiscal year.

2022 State Bar of California Legal Aid Grants

				EAF-IOLTA
#	Vendor	Organization		
1	11054	Advancing Justice - Asian Law Caucus	Advancing Justice - Asian Law Caucus	\$ 632,530
2	10242	Affordable Housing Advocates	Affordable Housing Advocates	\$ 20,690
3	11114	Aids Legal Referral Panel	Aids Legal Referral Panel	\$ 57,330
4	11115	Alameda County Homeless Action Center	Alameda County Homeless Action Center	\$ 258,050
5	11235	Alliance for Children's Rights	Alliance for Children's Rights	\$ 793,070
6	11219	Asian Americans Advancing Justice - Los Angeles	Asian Americans Advancing Justice- Los Angeles (formerly Advancing Justice-Los Angeles)	\$ 930,060
7	11073	Asian Pacific Islander Legal Outreach	Asian Pacific Islander Legal Outreach	\$ 168,540
8	11041	Bay Area Legal Aid	Bay Area Legal Aid	\$ 821,520
9	10163	Bet Tzedek Legal Services	Bet Tzedek Legal Services	\$ 1,679,700
10	11097	California Advocates for Nursing Home Reform	California Advocates for Nursing Home Reform	\$ 396,459
11	11050	California Indian Legal Services	California Indian Legal Services	\$ 451,390
12	11087	California Rural Legal Assistance Foundation	California Rural Legal Assistance Foundation	\$ 396,459
13	11182	California Rural Legal Assistance, Inc.	California Rural Legal Assistance, Inc.	\$ 4,276,880
14	11227	California Women's Law Center	California Women's Law Center	\$ 396,459
15	11104	Capital Pro Bono Inc.	Capital Pro Bono Inc. (formerly Voluntary Legal Services Program of No Cal)	\$ 267,430
16	10249	Casa Cornelia Law Center	Casa Cornelia Law Center	\$ 535,730
17	12336	Center for Gender and Refugee Studies - California	Center for Gender and Refugee Studies - California	\$ 396,459
18	12328	Center for Human Rights and Constitutional Law	Center for Human Rights and Constitutional Law	\$ 396,459
19	11042	Central California Legal Services	Central California Legal Services	\$ 2,020,730
20	10162	Centro Legal de la Raza	Centro Legal de la Raza	\$ 358,830
21	11165	Chapman University	Chapman University Family Protection Clinic	\$ 32,390
22	11099	Child Care Law Center	Child Care Law Center	\$ 396,459
23	10879	Coalition of California Welfare Rights Organizations	Coalition of California Welfare Rights Organizations	\$ 396,459
24	12882	Community Lawyers Inc.	Community Lawyers Inc.	\$ 11,970
25	11172	Community Legal Aid SoCal	Community Legal Aid SoCal	\$ 1,568,630
26	10149	Community Legal Services in East Palo Alto	Community Legal Services in East Palo Alto	\$ 383,760
27	12322	Contra Costa Senior Legal Services	Contra Costa Senior Legal Services	\$ 62,450
28	10182	Dependency Advocacy Center	Dependency Advocacy Center	\$ 154,560
29	12329	Disability Rights California	Disability Rights California	\$ 5,510,890
30	11078	Disability Rights Education and Defense Fund	Disability Rights Education and Defense Fund	\$ 396,459
31	11198	Disability Rights Legal Center	Disability Rights Legal Center	\$ 407,560
32	11107	East Bay Community Law Center	East Bay Community Law Center	\$ 279,900
33	11207	Elder Law & Advocacy	Elder Law & Advocacy	\$ 277,020
34	11143	Eviction Defense Collaborative	Eviction Defense Collaborative	\$ 84,360
35	12335	Family Violence Appellate Project	Family Violence Appellate Project	\$ 396,459
36	11070	Family Violence Law Center	Family Violence Law Center	\$ 43,560
37	12323	Greater Bakersfield Legal Assistance	Greater Bakersfield Legal Assistance	\$ 987,190
38	12324	Harriett Buhai Center for Family Law	Harriett Buhai Center for Family Law	\$ 317,370
39	10113	Housing and Economic Rights Advocates	Housing and Economic Rights Advocates	\$ 200,440
40	12869	IEP Collaborative, Inc.	IEP Collaborative, Inc.	\$ 1,220

Attachment A3 2022 EAF Grant Recipients

2022 State Bar of California Legal Aid Grants

				EAF-IOLTA	
#	Vendor	Organization			
41	11096	Immigrant Legal Resource Center	Immigrant Legal Resource Center	\$	396,459
42	11120	Impact Fund	Impact Fund	\$	396,459
43	11257	Inland Counties Legal Services	Inland Counties Legal Services	\$	2,998,500
44	12325	Inland Empire Latino Lawyers Association, Inc.	Inland Empire Latino Lawyers Association, Inc. (formerly IELLA Legal Aid Project)	\$	111,400
45	11212	Inner City Law Center	Inner City Law Center	\$	1,289,290
46	11094	Justice & Diversity Center of the Bar Association of San Francisco	Justice & Diversity Center of the Bar Association of San Francisco	\$	226,010
47	11206	Justice in Aging	Justice in Aging	\$	396,459
48	12326	La Raza Centro Legal	La Raza Centro Legal	\$	98,910
49	11162	LACBA Counsel for Justice	LACBA Counsel for Justice	\$	131,870
50	10432	Law Foundation of Silicon Valley	Law Foundation of Silicon Valley	\$	513,600
51	11072	Lawyers' Committee for Civil Rights	Lawyers' Committee for Civil Rights	\$	540,010
52	10967	Learning Rights Law Center	Learning Rights Law Center	\$	206,320
53	11100	Legal Access Alameda	Legal Access Alameda	\$	69,330
54	11083	Legal Aid at Work	Legal Aid at Work	\$	911,350
55	11167	Legal Aid Foundation of Los Angeles	Legal Aid Foundation of Los Angeles	\$	2,587,610
56	11175	Legal Aid Foundation of Santa Barbara County	Legal Aid Foundation of Santa Barbara County	\$	308,000
57	11031	Legal Aid of Marin	Legal Aid of Marin	\$	106,770
58	10876	Legal Aid of Sonoma County	Legal Aid of Sonoma County	\$	288,800
59	11173	Legal Aid Society of San Bernardino	Legal Aid Society of San Bernardino	\$	650,040
60	11171	Legal Aid Society of San Diego	Legal Aid Society of San Diego	\$	1,555,140
61	11033	Legal Aid Society of San Mateo County	Legal Aid Society of San Mateo County	\$	172,270
62	11098	Legal Assistance for Seniors	Legal Assistance for Seniors	\$	60,820
63	11062	Legal Assistance to the Elderly	Legal Assistance to the Elderly	\$	59,840
64	10428	Legal Services for Children	Legal Services for Children	\$	98,520
65	11108	Legal Services for Prisoners with Children	Legal Services for Prisoners with Children	\$	396,459
66	10920	Legal Services for Seniors	Legal Services for Seniors	\$	221,470
67	11030	Legal Services of Northern California	Legal Services of Northern California	\$	2,377,090
68	11189	Los Angeles Center for Law and Justice	Los Angeles Center for Law and Justice	\$	275,660
69	12877	Loyola Marymount University	Loyola Marymount University	\$	444,830
70	11021	McGeorge Community Legal Services	McGeorge Community Legal Services	\$	177,540
71	11208	Mental Health Advocacy Services	Mental Health Advocacy Services	\$	175,800
72	11069	National Center for Youth Law	National Center for Youth Law	\$	396,459
73	11203	National Health Law Program	National Health Law Program	\$	396,459
74	11064	National Housing Law Project	National Housing Law Project	\$	396,459
75	11238	National Immigration Law Center	National Immigration Law Center	\$	396,459
76	11181	Neighborhood Legal Services	Neighborhood Legal Services	\$	1,623,930
77	11074	OneJustice	OneJustice	\$	396,459
78	12868	Open Door Legal	Open Door Legal	\$	61,760
79	11068	Prison Law Office	Prison Law Office	\$	518,310
80	10159	Public Advocates Inc.	Public Advocates Inc.	\$	640,850

2022 State Bar of California Legal Aid Grants

				EAF-IOLTA	
#	Vendor		Organization		
81	10160	Public Counsel	Public Counsel	\$	2,204,340
82	11133	Public Interest Law Project	Public Interest Law Project	\$	396,459
83	11213	Public Law Center	Public Law Center	\$	1,212,580
84	11215	Riverside Legal Aid	Riverside Legal Aid	\$	481,160
85	10237	San Diego Volunteer Lawyer Program	San Diego Volunteer Lawyer Program	\$	511,660
86	12334	San Joaquin College of Law	San Joaquin College of Law (formally New American Legal Clinic)	\$	60,510
87	11202	San Luis Obispo Legal Assistance Foundation	San Luis Obispo Legal Assistance Foundation	\$	101,610
88	11067	Santa Clara County Asian Law Alliance	Santa Clara County Asian Law Alliance	\$	131,730
89	12331	Santa Clara University Alexander Law Center	Santa Clara University Alexander Law Center	\$	58,590
90	10164	Senior Adults Legal Assistance	Senior Adults Legal Assistance	\$	44,990
91	10395	Senior Advocacy Network	Senior Advocacy Network	\$	97,440
92	11058	Senior Citizens Legal Services	Senior Citizens Legal Services	\$	47,550
93	12613	Social Justice Collaborative	Social Justice Collaborative	\$	134,680
94	11157	UC Davis School of Law Legal Clinics	UC Davis School of Law Legal Clinics	\$	236,660
95	12619	UnCommon Law	UnCommon Law	\$	347,640
96	12330	USD School of Law Legal Clinics	USD School of Law Legal Clinics	\$	245,730
97	10394	Veterans Legal Institute	Veterans Legal Institute	\$	189,930
98	12332	Wage Justice Center	Wage Justice Center	\$	54,040
99	10133	Watsonville Law Center	Watsonville Law Center	\$	131,110
100	11197	Western Center on Law and Poverty	Western Center on Law and Poverty	\$	396,459
101	11093	Worksafe, Inc.	Worksafe, Inc.	\$	396,459
102	11052	Youth Law Center	Youth Law Center	\$	396,459
103	11066	Yuba-Sutter Legal Center for Seniors	Yuba-Sutter Legal Center for Seniors	\$	35,890
TOTALS				\$	58,147,328

Attachment A4 2022 Partnership Grant Recipients

2022 Partnership Grant Funding Recommendations

Total Amount Requested:	\$3,094,000
Total Amount Available:	\$2,580,574
2021 Amount Awarded (for reference)	\$2,420,000

Organization	Project Title	Rubric Score				Total Amount Requested	PG Committee Funding Recommendations (as of July 29, 2021)
		Selection Criteria Total	Funding Priority	Innovation	TOTAL		
Bet Tzedek Legal Services	Decedent's Estate Self-Help Clinic (NEW)	63	20	2	85	\$ 120,000	\$ 120,000
Bet Tzedek Legal Services	Remote Pro Se Technology Initiative (NEW)	63	20	6	89	\$ 150,000	\$ 120,000
California Rural Legal Assistance, Inc.	San Joaquin Housing Helpline Court Clinic Partnership (NEW)	59	20	3	82	\$ 137,000	\$ 120,000
Central California Legal Services	Tulare County Unlawful Detainer Workshop	62	16	0	78	\$ 75,000	\$ 70,000
Central California Legal Services	Tenant/Landlord Housing Law Project	51	16	0	67	\$ 72,000	\$ 60,000
Central California Legal Services	Guardianship Project	43	12	0	55	\$ 65,000	\$ 41,000
Community Legal Aid SoCal	Compton Self-Help Economic Expansion Project (NEW)	54	20	2	76	\$ 92,000	\$ 92,000
Community Legal Aid SoCal	Orange County Consumer Debt Workshop/Clinic	54	16	0	70	\$ 29,000	\$ 23,000
Community Legal Aid SoCal	Unlawful Detainer Workshop - Norwalk Courthouse	55	12	0	67	\$ 66,000	\$ 60,000
Elder Law & Advocacy	Imperial County Unlawful Detainer Clinic	54.7	17.3	0	72.0	\$ 74,000	\$ 74,000
Family Violence Law Center	Domestic Violence Pro Per (DVPP) Project	56.7	12	0	68.7	\$ 25,000	\$ 21,000
Inland Counties Legal Services	Consumer Rights Clinic	54	12	0	66	\$ 95,000	\$ 88,000
Justice & Diversity Center of the Bar Association of San Francisco	Shriver - SASH Self-Help	54	16	0	70	\$ 71,000	\$ 36,000
LACBA Counsel for Justice	LACBA-Domestic Violence Legal Services Project	63	16	0	79	\$ 99,000	\$ 80,000
Legal Access Alameda	Family Law Settlement Conference	58	12	0	70	\$ 65,000	\$ 61,000
Legal Access Alameda	Family Law Day of Court	63	12	0	75	\$ 30,000	\$ 25,000
Legal Aid Foundation of Los Angeles	2022 - Torrance Self-Help Center	63	16	0	79	\$ 100,000	\$ 84,000
Legal Aid Foundation of Santa Barbara County	Legal Resource Center Partnership	56	12	2	70	\$ 125,000	\$ 115,000
Legal Aid of Marin	Homelessness Prevention through Mandatory Settlement Conferences	64	20	1	85	\$ 80,000	\$ 80,000
Legal Aid Society of San Bernardino	Caregivers and Small Estates Accessing Justice	51	12	0	63	\$ 138,000	\$ 85,000
Legal Aid Society of San Diego	Name Change & Gender Marker Change Self-Help Clinic	54	12	4	70	\$ 85,000	\$ 75,000
Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion Project	64	12	0	76	\$ 80,000	\$ 72,574
Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	54	12	0	66	\$ 87,000	\$ 60,000
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	54	8	0	62	\$ 67,000	\$ 48,000
Legal Services of Northern California	Yolo Consumer Clinic	59	20	0	79	\$ 67,000	\$ 67,000
Neighborhood Legal Services	STABILIZING FAMILIES PARTNERSHIP GRANT	54	16	0	70	\$ 102,000	\$ 100,000
Neighborhood Legal Services	CHATSWORTH CONSUMER TECHNOLOGY PARTNERSHIP GRANT	54	16	0	70	\$ 100,000	\$ 90,000
Neighborhood Legal Services	PASADENA CONTINUUM OF SERVICES	54	16	0	70	\$ 105,000	\$ 81,000
Public Counsel	Guardianship Clinic	59	8	2	69	\$ 60,000	\$ 22,000
Public Law Center	DeFacto & Adoptive Parent Assistance Project	59	16	0	75	\$ 50,000	\$ 47,000
Public Law Center	Orange County Courthouse Guardianship Clinic	54	12	0	66	\$ 60,000	\$ 32,000
Riverside Legal Aid	Small Estates Partnership	46	8	0	54	\$ 110,000	\$ 70,000
San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	61.7	16	4	81.7	\$ 130,000	\$ 93,000
San Luis Obispo Legal Assistance Foundation	San Luis Obispo County Rental Clinic	64	20	3	87	\$ 115,000	\$ 110,000
Santa Clara University Alexander Law Center	Consumer Debt Clinic	54	12	0	66	\$ 60,000	\$ 50,000
Senior Citizens Legal Services	Indigent Landlord/Tenant Services and Mediation (NEW)	65	20	5	90	\$ 108,000	\$ 108,000

\$ 3,094,000	\$ 2,580,574
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Available	\$ 2,580,574
Balance	\$ -

Attachment A5 Partnership Grant 2.0 Recipients

PARTNERSHIP GRANT 2.0 FUNDING RECOMMENDATIONS*as of the February 16, 2022 Partnership Grants Committee Meeting*

Total Amount Available:	\$ 3,880,237
Total Amount Requested:	\$ 4,717,478
<i>Option 1 (Supplemental) Amount Requested:</i>	<i>\$ 206,000</i>
<i>Option 2 (New) Amount Requested:</i>	<i>\$ 4,511,478</i>

Application Type	Organization	Acronym	Project Title	Rubric Score				Requested Amount	PG Committee Reco as of 2/16/22
				Selection Criteria	Funding Priority	Innovation	TOTAL		
Supplemental	Bet Tzedek Legal Services	BetTzedek	Remote Pro Se Technology Initiative	63	20	6	89	\$ 30,000	\$ 30,000
Supplemental	California Rural Legal Assistance, Inc.	CRLA	San Joaquin Housing Helpline Court Clinic Partnership (Supplemental)	59	20	3	82	\$ 17,000	\$ 17,000
Supplemental	Central California Legal Services	CCLS	Guardianship Project	43	12	0	55	\$ 24,000	\$ 24,000
Supplemental	Family Violence Law Center	FVLC	Domestic Violence Pro Per (DVPP) Project	56.7	12	0	68.7	\$ 4,000	\$ 4,000
Supplemental	Inland Counties Legal Services	ICLS	Consumer Rights Clinic	54	12	0	66	\$ 7,000	\$ 7,000
Supplemental	LACBA Counsel for Justice	LACBA	LACBA Domestic Violence Legal Services Project (Supplemental)	63	16	0	79	\$ 19,000	\$ 19,000
Supplemental	Legal Access Alameda	LAA	Family Law Settlement Conference	58	12	0	70	\$ 4,000	\$ 4,000
Supplemental	Legal Access Alameda	LAA	Family Law Day of Court	63	12	0	75	\$ 5,000	\$ 5,000
Supplemental	Legal Assistance for Seniors	LAS	Partnership to Assist Guardianship Litigants	54	8	0	62	\$ 19,000	\$ 19,000
Supplemental	Riverside Legal Aid	RLA	Supp SEAP 2022	46	8	0	54	\$ 40,000	\$ 40,000
Supplemental	San Diego Volunteer Lawyer Program	SDVLP	Central Division Restraining Order Clinic	61.7	16	4	81.7	\$ 37,000	\$ 37,000
New	Bet Tzedek Legal Services	BetTzedek	Post-Hearing Virtual Services Project	60	16	4	80	\$ 300,000	\$ 255,000
New	Community Legal Aid SoCal	CLASC	LA County SHLAC Hybrid Bridge project	57	16	4	77	\$ 228,813	\$ 194,491
New	Inland Counties Legal Services	ICLS	Family Law Access Partnership (FLAP)	57	17	4	76	\$ 236,820	\$ 211,088
New	LACBA Counsel for Justice	LACBA	DVRO Remote Access Project	72	16	4	92	\$ 300,000	\$ 300,000
New	Legal Aid Foundation of Los Angeles	LAFLA	LAFLA Self Help Remote Technology Access Project - New	64	16	6	86	\$ 300,000	\$ 300,000
New	Legal Aid of Marin	LAM	Community Court Expansion	75	16	6	97	\$ 140,000	\$ 140,000
New	Legal Aid Society of San Bernardino	LASSB	Domestic Violence and Homeless Prevention	52	20	2	74	\$ 300,000	\$ 264,790
New	Legal Aid Society of San Diego	LASSD	East County Restraining Order Clinic	65	16	2	83	\$ 300,000	\$ 300,000
New	Mental Health Advocacy Services	MHAS	Mental Health Court Clinic	63	18	8	84	\$ 300,000	\$ 300,000
New	Neighborhood Legal Services	NLS	Bridge to Self-Help (BSH)	72	20	6	98	\$ 300,000	\$ 300,000
New	Neighborhood Legal Services	NLS	A2J: Navigating a Remote World	63	16	0	79	\$ 300,000	\$ 255,000
New	Neighborhood Legal Services	NLS	International Service - Hague Remote Self-Help	58	16	4	78	\$ 300,000	\$ 255,000
New	Neighborhood Legal Services	NLS	Remote UD Self-Help for San Gabriel Valley	52	16	0	68	\$ 300,000	\$ -
New	Public Counsel	PublicCounsel	Guardianship Clinic Expansion	73	16	2	89	\$ 300,000	\$ 300,000
New	Public Counsel	PublicCounsel	Appellate Clinic Expansion	61	16	6	83	\$ 197,000	\$ 197,000
New	Senior Citizens Legal Services	SCLS	Expanded Indigent Landlord/Tenant Services and Mediation	65	16	0	81	\$ 119,845	\$ 101,868
New	UC Davis School of Law Legal Clinics	UCDavis	Partnership Grant 2.0	47	16	6	69	\$ 289,000	\$ -

\$ 4,717,478	\$ 3,880,237
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Available \$	3,880,237
Balance \$	0

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

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

RECITALS

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

AGREEMENTS

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

Eligibility Guidelines (“Eligibility Guidelines”), and Application Materials, including any additions or amendments made to the Application Materials by an agreement between the State Bar and Recipient, are incorporated into this Agreement as if set forth in their entirety in this Agreement. Recipient agrees to comply with the Act, Budget Act, Fee Schedule Act, Rules, Grant Provisions, Eligibility Guidelines, Assurances, and other agreements made in the Application Materials. Recipient agrees to comply with all lawful statutes, rules, regulations, guidelines, policies, instructions, and similar directives pertaining to the Program and the Fund (collectively, “Directives”) issued by the State of California, the Supreme Court of the State of California or the State Bar, including without limitation, any Directive adopted after the Effective Date. These Directives include, but are not limited to, Equal Access Fund reporting requirements related to funding allocations, annual expenditures, and program outcomes by service area. Pursuant to additional reporting requirements imposed by the Judicial Council pursuant to the Budget Act of 2021, Recipient agrees to submit a mid-year evaluation report for the period of January 1 - June 30, and a final evaluation report for the period of January 1 - December 31, pursuant to instructions and deadlines to be provided by the State Bar.

4. Recipient represents and warrants that its governing board, the officers, executive director, and similarly empowered staff have read and understand this Agreement, the Act, Rules, Application Materials, Eligibility Guidelines, and Grant Provisions. Recipient has familiarized appropriate staff with the requirements of this Agreement, the Act, the Rules, the Grant Provisions, and the Application Materials.
5. Recipient acknowledges that the terms of this Grant, including Grant Provision Article 4.05, Regulating Rule 3.680(E)(1), and Business and Professions Code Section 6222, require Recipient to submit to the State Bar an accurate and complete financial statement that has been audited or reviewed by a certified public accountant as specified in the Schedule of Charges and Deadlines.
6. The State Bar will pay the Grant Amount in accordance with the Grant Provisions. However, under no circumstances will the State Bar bear any liability to Recipient or to other persons or entities for delays in payments.
7. Termination.
 - a) Notwithstanding the Grant Provisions or any other provision of this Agreement regarding the payment of the Grant, Recipient acknowledges that the Grant Amount and all payments thereof shall be made from funds received by the State Bar pursuant to the Budget Act and Fee Schedule Act (“State Funding”), and are contingent upon the availability and sufficiency of such funds, as determined by the State Bar in its sole discretion. Consequently, Recipient shall not be guaranteed any specific dollar amount in grant funds, or any grant funds at all, if funds received pursuant to State Funding are insufficient or unavailable to the State Bar. This Agreement shall terminate automatically if State Funding becomes unavailable. The State Bar will not assume any liability whatsoever to Recipient for any failure to pay the Grant Amount or any part thereof that results because funds are insufficient or unavailable.
 - b) The State Bar may terminate this Agreement pursuant to the process set forth in Rule 3.691.

- c) The State Bar may terminate this Agreement, in its sole discretion, with or without cause and for any reason upon thirty (30) days' written notice to Recipient.
 - d) The State Bar may terminate for cause, without prejudice to State Bar's right to recover any Grant Amount previously paid, if Recipient fails to comply with the provisions of this Agreement. The termination shall be effective five (5) business days after the State Bar sends written notice of termination to Recipient.
 - e) This Agreement will terminate automatically in the event of the bankruptcy or insolvency of either Party.
- 8. This Agreement does not impose on the State Bar any obligation to provide Recipient funds in excess of the Grant Amount or beyond the end of the Grant Period.
 - 9. Recipient shall spend the Grant Amount received in connection with the Program and Fund in each county and in the amounts set forth in Attachment A – Grant Allocation Detail, which is attached hereto and incorporated herein by reference.
 - 10. Recipient represents and warrants that the Recipient's Application Materials for the Grant under the Program and Fund does not misstate or omit any material fact. Recipient will notify the State Bar within five (5) business days after any change in any material fact affecting Recipient's eligibility to receive funds under the Program and Fund, including without limitation, any change that affects the accuracy of any statement made in conjunction with Recipient's application for the grant under the Program and Fund. Recipient will also notify the State Bar within five (5) business days of any material change in the planned activities or proposed budget contained in the Application Materials or any revision thereto.
 - 11. Recipient will not make any misrepresentations or misstatements of fact in any communications or report to the State Bar. In the event Recipient later discovers that any statement made to the State Bar is no longer true, Recipient will notify the State Bar within five (5) business days after discovering that the statement is no longer true. This obligation of Recipient shall survive the termination of the Agreement and/or the expiration of the Grant Period.
 - 12. Recipient will notify the State Bar within five (5) business days of Recipient's awareness of any of the following events: (1) a decision to change Recipient's name, merge or consolidate with another entity, cease operations, or cease the activities funded by the Grant; (2) a decision to close or relocate any main or branch office; (3) significant management changes, including the departure of and/or hiring or appointment of the executive director or board chairperson; (4) Recipient becomes insolvent or is in danger of becoming insolvent within three months; (5) a monetary judgment, settlement, sanction, penalty, or force majeure event that will substantially impact Recipient's delivery of legal services; (6) Recipient or any of Recipient's officials (e.g., officers and executive team members) or employees with control over finances or financial management responsibilities is investigated for or charged with fraud, misappropriation, embezzlement, theft, or any similar offense, or are suspended, disciplined, or delicensed by a bar or other professional licensing organization; (7) Recipient is investigated or audited by the Legal Services Corporation or any other provider of funds to Recipient. This obligation of

Recipient shall survive the termination of the Agreement and/or the expiration of the Grant Period.

13. In support of the State Bar's obligation to the Judicial Council to ensure full participation by Program recipients in maintaining and using statewide on-line resources for legal advocates and consumers of legal services, Recipient will:
 - a) Ensure that, during the Grant Period, Recipient is accurately identified on the statewide legal services websites, including, as appropriate, in the:
 - i. Client referral directory on LawHelpCA.org;
 - ii. Legal Services Directories (support center and field program directories); and
 - iii. *Pro Bono* Programs Guide on CaliforniaProBono.org;
 - b) Include information about LawHelpCA.org and CALegalAdvocates.org in trainings for new staff advocates, circulate information received from state coordinators about these websites to appropriate staff members, encourage staff to join the CALegalAdvocates.org website, and must encourage participation in brief trainings about the websites as available; and
 - c) Provide a link to LawHelpCA.org on its own program's website.
14. Recipient will permit the State Bar's personnel, independent contractors or agents ("Personnel") to inspect at any time any records and/or any office or other premises maintained by Recipient or used by Recipient in connection with the expenditure of the Grant Amount received under the Program. Recipient will cooperate with the State Bar's Personnel during such inspections and will furnish to the Personnel any information that the Personnel reasonably request as relevant to determining Recipient's compliance with this Agreement. The State Bar's right of access to Recipient's records and premises for purposes of compliance will survive the expiration of the Grant Period and/or any termination of this Agreement. In complying with disclosure requirements of this Agreement and of the Program and Fund, Recipient may withhold any client-identifying information when Recipient reasonably determines that disclosure would violate the Act, the Rules, a rule of professional responsibility or any other laws.
15. The Act, Budget Act, Fee Schedule Act, Rules, Grant Provisions, Eligibility Guidelines, and Directives set forth requirements concerning the use of Program funds and payment for subcontracts to provide legal services ("Subcontracted Services"). Recipient acknowledges its obligation to inform all providers of Subcontracted Services of the requirements of the Program and to obtain from all Subcontracted Services providers a written agreement to comply with all requirements of this Agreement as if that provider is the Recipient. Recipient assigns to the State Bar all rights that Recipient has or shall acquire to inspect the premises and records of providers of Subcontracted Services to ensure compliance with Program; provided, however, that disclosure of client-identifying information by a provider of Subcontracted Services shall be governed by the provisions of Section 14 above.
16. Recipient shall not represent or in any way suggest that it may obligate or pledge the credit of the State of California or of the State Bar.

17. Except as otherwise required by law, Recipient shall own all rights, title and interest in any materials produced as a result of this Grant (the "Grant Work Product"). Recipient hereby grants to the State Bar a non-exclusive, transferable, perpetual, irrevocable, royalty-free, paid-up, worldwide right and license to use, re-use, display, perform, reproduce, publish, copy, modify, create derivative works and distribute, for non-commercial purposes, the Grant Work Product and any other work product arising out of or resulting from the Grant Amount, including all intellectual property rights appurtenant thereto, and to sublicense such rights to third parties. Without limiting the foregoing, such license includes the right of the State Bar to publish the Grant Work Product on the State Bar's website, and for use in periodic reports, press releases, meetings, and fact sheets. Recipient further acknowledges and agrees, at the State Bar's request, to execute any additional documents necessary to effect such license.
18. Recipient agrees to indemnify, defend, and hold harmless State Bar (including its Board of Trustees, officers, agents, and employees, as the same may be constituted now and from time to time hereafter) from and against any and all liabilities, losses, damages, expenses or costs, whatsoever (including reasonable attorneys' fees, costs, and expenses), which may arise against or be incurred by the State Bar as a result of or in connection with (i) claims by any and all contractors, subcontractors, providers of consulting services, materialmen, laborers, or any other person, firm, or corporation retained by Recipient to furnish or supply work, service, materials, or supplies in connection with the performance of this Agreement; (ii) claims by any person, firm, or corporation for loss, injury or damage by Recipient or Recipient's agents in connection with the provision of legal services pursuant to this Agreement; (iii) any acts or omissions of Recipient, or its officers, employees or agents, in applying for, accepting, expending or applying the Grant Amount or in performing activities or services in breach of this Agreement. Recipient shall be liable to the State Bar for all costs (including but not limited to reasonable attorneys' fees, costs and expenses) that may be incurred) arising from or in connection with the State Bar's enforcement of its rights under this Section 18. This indemnity provision shall survive the termination or expiration of this Agreement.
19. Recipient will maintain insurance coverage such as commercial general liability insurance, workers' compensation insurance and comprehensive automobile liability sufficient to cover its services, activities, risks, and potential omissions of the services in accordance with generally-accepted industry standards and as required by law. Recipient shall provide the State Bar offices at 180 Howard Street, San Francisco, CA 94105 Attn: Risk Management with these certificates of insurance within thirty (30) days of the Effective Date. Recipient will ensure subcontractors maintain insurance coverage consistent with this Section.
20. Any notices to be given by either Party to the other must be in writing, and both emailed and delivered personally or by first-class, certified, registered, or overnight mail addressed to the Parties at the addresses stated below:

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

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

Program Name and Number: «ProgramNumber»

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

Attention: «PrimaryContactName»
 «PrimaryContactJobTitle»

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

21. This Agreement, together with the Act, Budget Act, Fee Schedule Act, Application Materials, Rules, Grant Provisions, Assurances, Eligibility Guidelines, Directives, and Attachment A contains and constitutes the entire agreement between the State Bar and Recipient regarding the State Bar's Grant of Equal Access Fund monies to Recipient and supersedes all prior negotiations, representations, or agreements, either written or oral.
22. The Recipient shall neither assign nor transfer any rights or obligations under this Agreement without the prior written consent of the State Bar. This Agreement shall be binding upon agents and successors of both Parties.
23. No amendment, alteration or variation of the terms of this Agreement will be valid unless made in writing and signed by both of the Parties.
24. This Agreement was made and entered into by the Parties in the State of California and shall be construed according to the laws of the State of California. Any action or suit brought to interpret, construe, or enforce the provisions of this Agreement shall be commenced in the Superior Court of the State of California, in and for the County of San Francisco.
25. Each Party represents that it has full power and authority to enter into and perform this Agreement and the person signing this Agreement on behalf of each Party has been properly authorized and empowered to enter into this Agreement. Each Party further acknowledges that its Directors, Trustees, or similarly empowered persons have read this Agreement, understand it, and agree to be bound by it.
26. No term or provision herein shall be deemed waived and no breach excused unless such waiver or consent is in writing and signed by the Party claimed to have waived or consented. No consent or waiver by one Party to a breach of this Agreement by the other Party, whether expressed or implied, shall constitute consent to, waiver of, or excuse for any other, different, or subsequent breach. No amendment, consent, or waiver on behalf of the State Bar shall be binding upon the State Bar unless it is executed by the Executive Director of the State Bar or the Executive Director's designee.
27. Each provision of this Agreement shall be separately enforceable, and the invalidity or unenforceability of one provision shall not affect the validity or enforceability of any other provision.

Program Name and Number: «ProgramNumber»

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

[Signatures Follow]

Program Name and Number: «ProgramNumber»

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

THE STATE BAR OF CALIFORNIA**RECIPIENT**

Date:

Date:

By:

By:

Print Name of Executive Director

Print Title of State Bar Executive
Officer

By:

Print Title of Board Officer

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

ATTACHMENT A – GRANT ALLOCATION DETAIL

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

Recipient: «ProgramLegalName»

Equal Access Fund

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

Grant Amount: «FinalEAFGrantAllocation»

County	Qualified Expenditures	Basic Allocation	Pro Bono Allocation	Total Allocation
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2023 EAF-IOLTA Recipients

Organization	Program Acronym
Advancing Justice - Asian Law Caucus	AJ-ALC
Affordable Housing Advocates	AHA
Aids Legal Referral Panel	ALRP
Alameda County Homeless Action Center	HAC
Alliance for Children's Rights	Alliance
Asian Americans Advancing Justice Southern California	AAAJ-LA
Asian Pacific Islander Legal Outreach	APILO
Bay Area Legal Aid	BayLegal
Bet Tzedek Legal Services	BetTzedek
California Advocates for Nursing Home Reform	CANHR
California Indian Legal Services	CILS
California Rural Legal Assistance Foundation	CRLAF
California Rural Legal Assistance, Inc.	CRLA
California Women's Law Center	CWLC
Capital Pro Bono Inc.	CPB
Casa Cornelia Law Center	CasaCornelia
Center for Gender and Refugee Studies - California	CGRS-CA
Center for Human Rights and Constitutional Law	CHRCL
Central California Legal Services	CCLS
Centro Legal de la Raza	CentroLegal
Child Care Law Center	CCLC
Coalition of California Welfare Rights Organizations	CCWRO
Community Lawyers Inc.	CLI
Community Legal Aid SoCal	CLASC
Community Legal Services in East Palo Alto	CLSEPA
Contra Costa Senior Legal Services	CCSenior
Dependency Advocacy Center	DAC
Disability Rights California	DRC
Disability Rights Education and Defense Fund	DREDF
Disability Rights Legal Center	DRLC
East Bay Community Law Center	EBCLC
Elder Law & Advocacy	ELA
Eviction Defense Collaborative	EDC
Family Violence Appellate Project	FVAP
Family Violence Law Center	FVLC
Greater Bakersfield Legal Assistance	GBLA
Harriett Buhai Center for Family Law	HarriettBuhai
Housing and Economic Rights Advocates	HERA
IEP Collaborative, Inc.	IEPC
Immigrant Legal Resource Center	ILRC
Impact Fund	ImpactFund
Inland Counties Legal Services	ICLS
Inland Empire Latino Lawyers Association, Inc.	IELLA
Inner City Law Center	ICLC
Justice & Diversity Center of the Bar Association of San Francisco	JDC
Justice in Aging	JIA
La Raza Centro Legal	LaRaza
LACBA Counsel for Justice	LACBA
Law Foundation of Silicon Valley	LFSV
Lawyers' Committee for Civil Rights	LCCR
Learning Rights Law Center	LRLC

Attachment A7 2023 EAF-IOLTA Eligible Grantees

Legal Access Alameda	LAA
Legal Aid at Work	LAAW
Legal Aid Foundation of Los Angeles	LAFLA
Legal Aid Foundation of Santa Barbara County	LAFSBC
Legal Aid of Marin	LAM
Legal Aid of Sonoma County	LASC
Legal Aid Society of San Bernardino	LASSB
Legal Aid Society of San Diego	LASSD
Legal Aid Society of San Mateo County	LASSMC
Legal Assistance for Seniors	LAS
Legal Assistance to the Elderly	LAE
Legal Services for Children	LSC
Legal Services for Prisoners with Children	LSPC
Legal Services for Seniors	LSS
Legal Services of Northern California	LSNC
Los Angeles Center for Law and Justice	LACLJ
Loyola Marymount University	LMU
McGeorge Community Legal Services	McGeorge
Mental Health Advocacy Services	MHAS
National Center for Youth Law	NCYL
National Health Law Program	NHLP
National Housing Law Project	NationalHousing
Neighborhood Legal Services	NLS
OneJustice	OneJustice
Open Door Legal	ODL
Prison Law Office	PLO
Public Advocates Inc.	PublicAdvocates
Public Counsel	PublicCounsel
Public Interest Law Project	PILP
Public Law Center	PLC
Riverside Legal Aid	RLA
San Diego Volunteer Lawyer Program	SDVLP
San Joaquin College of Law	SJCL
San Luis Obispo Legal Assistance Foundation	SLOLAF
Santa Barbara County Immigrant Legal Defense Center	SBILDC
Santa Clara County Asian Law Alliance	SCALA
Santa Clara University Alexander Law Center	KGALC
Senior Adults Legal Assistance	SALA
Senior Advocacy Network	SAN
Senior Citizens Legal Services	SCLS
Social Justice Collaborative	SJC
UC Davis School of Law Legal Clinics	UCDavis
UnCommon Law	UCLAW
USD School of Law Legal Clinics	USD
Veterans Legal Institute	VLI
Wage Justice Center	WageJustice
Watsonville Law Center	Watsonville
Western Center on Law and Poverty	WCLP
Worksafe, Inc.	Worksafe
Youth Law Center	YLC
Yuba-Sutter Legal Center for Seniors	Yuba-Sutter



The State Bar
of California

OFFICE OF ACCESS & INCLUSION

THE PARTNERSHIP GRANT REQUEST FOR PROPOSAL: REQUIREMENTS, PRIORITIES, AND POLICIES

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

Partnership Grants are competitive and discretionary. Project proposals must be submitted on SmartSimple by **5:00 p.m. on Friday, March 18, 2022**.

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

BACKGROUND

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

Partnership Grants are awarded through a competitive process. The Commission reviews and compares all eligible proposals and makes funding recommendations to the Judicial Council. Grants are awarded for a one-year period commencing January 1. Decisions of the Commission, as approved by the Judicial Council, are final; there is no appeals process. Due to the limited availability of funding, all proposals may not be funded. Historically, projects have been funded in a range from \$20,000 to \$120,000. Grant award allocations also vary based on available funding. For the 2022 grant year, a total of \$2.58 million was awarded to 36 eligible projects.

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

Partnership Grants: Requirements, Priorities, Policies

Page 2

At the conclusion of each grant year, Partnership grantees must submit a comprehensive report and evaluation on the use and impact of these funds. Partnership Grant funding is typically awarded for no more than five consecutive years of support, and applicants must describe their plans for obtaining funding from other sources to support these projects after the termination of Partnership Grant support.

2023 PARTNERSHIP GRANTS SCORING RUBRIC

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

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

Eligibility Requirements

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

- Qualified Legal Services Projects (QLSPs): Pursuant to Business & Professions Code 6210 et seq., only QLSPs are eligible to apply for Partnership Grants.
- Joint Court/Qualified Legal Services Projects: Proposals must be for projects jointly developed and implemented by California State courts and QLSPs, 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: Partnership Grant funding is restricted to providing assistance to individuals who are or expect to be engaged in civil litigation without representation by counsel. These funds cannot be used to make court appearances on behalf of litigants.

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

Selection Criteria (80 points)

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

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

Funding Priorities (20 points)

In 2018, the Commission approved the following policy regarding funding priorities:

"Historically, Partnership Grants have been awarded as "seed funding," with an initial expectation of funding reductions after the first three years and termination of funding after the fifth year. This model can sometimes lead to valuable, high functioning projects making major changes to their substantive focus or operational model for the purpose of retaining eligibility for Partnership Grant funding beyond the initial five-year period.

While the Commission continues to prioritize innovative programs, it also seeks to support existing projects that provide valuable services to underserved communities. The following considerations are intended to assist applicants in setting reasonable expectations regarding the expected timeframe for the duration of Partnership Grant support.

Matters to be taken into consideration when determining whether to renew Partnership Grant funding include:

- That Partnership Grants will continue to be awarded with the principal intention of providing seed funding for new projects, which may be renewed annually over an initial five-year period.
- That Partnership Grant funding may or may not be reduced from year to year during that time, taking into account project strength, demonstrated success, and funding availability.
- That the discretionary nature of Partnership Grants, under which the Commission's decisions on continued funding may be contingent upon projects meeting programmatic, administrative, and financial expectations The Commission retains discretion not to renew funding within the initial five-year timeframe should projects be unable to meet basic expectations.
- That funding beyond a fifth-year cycle be considered on a case by case basis. Particular consideration should be given to projects supporting unmet rural needs, program that have evolved to respond to a recent emergency or disaster, and high functioning and heavily utilized projects that have been unable to secure alternate funding despite documented efforts. The foregoing examples are illustrative, not exclusive.
 - Applicants seeking funding beyond a fifth year into a second cycle must demonstrate the effectiveness of the project and provide additional justification such as documentation of their pursuit of alternate funding sources, narratives and quantitative data on local needs or circumstances, and/or additional project

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evaluation such as court feedback, case file review or other such evaluative processes.

- Projects seeking funding beyond a fifth year will be reviewed with respect to the factors cited above, as well as in comparison to new and other renewing applicants in the areas of program strength, demonstrated success, and funding availability.”

The Commission will exercise its discretion and score the project 1-5 based on funding priorities. That number will be multiplied by 4 for a maximum section score of 20 points.

Optional – Innovation (up to 10 points)

The Commission encourages innovative projects and may award up to 10 bonus points for innovation.

Examples of innovation may include:

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

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

DEFINITIONS	
Exceeds Expectations	Response is very high quality, addressing all questions in the request for proposal and all elements of the selection criteria. The identified strengths in the category are substantial with no or minimal weaknesses or additional questions identified. Any identified weakness has minimal effect on the overall quality of the response.
Meets Expectations	Response is good, effectively addressing most questions in the request for proposal and the selection criteria. Strengths and weaknesses are

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	identified that may balance each other in significance. Overall quality of response is satisfactory
Below Expectations	Response is weak, neglecting to address questions in the request for proposal and the elements of the criteria. The responses Identified weaknesses hold significant weight, overshadowing the identified strengths. Overall quality of response is inadequate, with significant flaws in key elements.

SELECTION CRITERIA (80 PTS)

Checkmark the appropriate ranking for each category, and then multiply by the number below. Add sub-scores from A and B to get the total points for this section.

CATEGORY & DESCRIPTION	Exceeds Expectations	Meets Expectations	Below Expectations
<u>Court Involvement</u> A successful proposal will indicate: <ul style="list-style-type: none"> significant cooperation between the partner court and legal services organization, integration with other court-based services and if the project's services are to be reserved for only one litigant role, such as petitioners but not respondents, that this has been thoroughly explored with the court, and alternate legal resources that can provide meaningful if not equivalent levels of assistance to the opposing parties have been identified. 			
<u>Project Impact</u> A successful proposal will clearly describe the needs of the targeted population and how anticipated outcomes of the proposed activity(ies) will have a meaningful impact on this population. Outcomes may include the number of people served, nature of the impact, and other project deliverables that will be achieved with this grant funding during the grant period.			
A. Number of Check Marks	X20=	X15=	X10=
Subtotal (A)			
<u>Administration</u> A successful proposal will demonstrate the ability and capacity to implement and manage the proposed activity(ies). Strong administration includes adequate staffing, leadership, and oversight of project monitoring, outreach, and resource development. An applicant's historical demonstration of its ability to meet goals from prior grants and timely reporting of results/outcomes will also be considered under this category.			

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Project Budget A successful project will clearly reflect how Partnership Grant funds are tied to actual project expenses or directly related costs.			
Continuity Planning A successful proposal will be able to articulate how its proposed services might continue beyond the grant period and comprehensive details on how sustainability might be achieved beyond simply stating a general intent to secure additional funding. This may include Identifying how the proposed project fits within current organizational programming, and whether the project is replicable or scalable			
Evaluation A successful proposal will incorporate meaningful evaluation plans and metrics that effectively demonstrate whether and how the project's planned goals are being achieved. This may include a clear statement of the project goals, strategies to be used to achieve those goals, evaluation methods to be used to make any mid-course adjustments to the delivery model, and evaluation methods to gauge the success of the project. Returning organizations applying for the same funding opportunity will also need to address prior evaluation outcomes and metrics.			
B. Number of Check Marks	X10 =	X6 =	X3 =
Subtotal (B)			
Selection Criteria Total (A+B)			

FUNDING PRIORITIES (20 PTS)

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

1. Partnership Grants will be awarded with the principal intention of providing seed funding for <u>new projects</u> and projects in their second to fifth year of funding. 2. Projects requesting funding beyond their fifth year that serve rural areas, are responsive to a recent emergency or disaster, or are high-functioning and heavily utilized projects but have been unable to secure alternate funding despite documented efforts are prioritized. 3. Projects seeking funding beyond a fifth year that are not in these priority areas are considered for funding only after proposed awards have been allocated for all prioritized projects. The State Bar retains discretion to waive this policy.	5 4 3 2 1
Funding Priority Total Score	X4 =

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OPTIONAL - INNOVATION (up to 10 PTS) The Committee may exercise discretion in awarding points for innovation. Based on your review of the proposal, determine if wish to score additional points for innovation and provide your reason(s) below.		
Additional points will be awarded to successful proposals that demonstrate innovation.	YES	NO
Bonus Points Awarded (1-10 pts)		
Reason(s) for awarding bonus points for innovation:		

OTHER POLICIES REGARDING ADMINISTRATION OF PARTNERSHIP GRANTS

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

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

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

Overhead, Administration, and Audit (August 2018)

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

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

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

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

- The contract governing the relationship between the grant recipient organization and the court must clearly specify that grant-funded court staff will only work on project activities, not on other duties that might be assigned by the court.
- The contracted staff must follow the Guidelines for the Operation of Self-Help Centers, with particular regard to ensuring the court's neutrality as to the fact that services are

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being provided, the manner in which they are provided, and the persons to whom they are provided.

- The services funded would not otherwise be provided by the court, but for the Partnership Grant. The Partnership Grant shall not supplant existing funding or services.
- The project budget must include additional funding sufficient to assist litigants who do not qualify to be served with Partnership Grant funding.
- In these and all cases, the court must participate in providing feedback and in developing evaluative data. Where funding is sub-granted to the court partner for payment of court staff, this evaluative data will include information on the number of litigants using the service who do not meet the definition of “indigent” found at Business & Professions Code §6213.

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

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

Attachment A9 Summary of 2023 Partnership Grant Proposals

Summary of 2023 Partnership Grant Proposals

Number	Organization	Project Title	County(ies) Served	Project Description	Recommendation
1	Bet Tzedek Legal Services	Remote Pro Se Technology Initiative	Los Angeles	<p>Bet Tzedek has been implementing the Self-Help Conservatorship Clinic (SHCC) and Elder Abuse Restraining (EARO) clinics virtually since the start of the pandemic. As the remote pro se assistance model has significantly expanded access for everyone, Bet Tzedek is committed to continuing this successful model post-pandemic and to expand its reach and capacity in 2023.</p> <p>With support from a State Bar Partnership grant, Bet Tzedek and the Los Angeles Superior Court (LASC) joined forces to launch the Remote Pro Se Technology Initiative in 2022. In 2023, we will expand and improve upon technology used and services delivered based on evaluation results from 2022. Program components currently include remote SHCC and EARO Clinic services, online video tutorials and modules to complement remote aid, improvement of court technologies that support remote assistance, outreach to publicize remote services, and remote EARO kiosk intake. In 2023, the SHCC and EARO teams will work to expand our reach by focusing on training additional courts, piloting remote EARO kiosk intake at courts beyond Stanley Mosk, and improving piloted technology. This initiative will increase access to justice and provide a model for effective remote services throughout California.</p>	\$120,000
2	Bet Tzedek Legal Services	Decedent Estate Self-Help Clinic	Los Angeles	<p>Grief can be especially complicated for heirs of decedents who were unable to complete an estate plan before their death to probate the estate. Probate is a time-consuming and expensive process, but one that lends itself to a self-help model. In 2022, Bet Tzedek and the Los Angeles Superior Court established the County's only court-based clinic that provides free self-help services to pro per litigants in decedent estate matters. The project will operate remotely from Stanley Mosk Courthouse (hours of operation TBD), with the potential to expand to the Antelope Valley Courthouse in the future.</p> <p><i>During the grant period, Bet Tzedek will continue to develop clinic procedures, improve court processes, and expand services in</i></p>	\$150,000
3	California Rural Legal Assistance, Inc.	San Joaquin County Housing Helpline Court Clinic Partnership	San Joaquin	<p>California Rural Legal Assistance's San Joaquin Housing Helpline provides one-on-one legal advice and/or information to San Joaquin tenants with housing concerns, focusing on housing retention and prevention of homelessness. In addition to individual phone consultations with tenants, Helpline staff offer weekly answer and trial preparation clinics, available to all San Joaquin tenants and landlords. Although most services are delivered virtually through phone and over Zoom, we offer weekly in-person clinics at CRLA's Stockton office located across the street from the court. Helpline staff are available to meet in-person with tenants with disability-based needs to access services. Participants can elect to attend the group answer clinics in-person or via Zoom link.</p> <p>San Joaquin tenants not eligible for CRLA services are given legal information, know your rights (KYR) print and video resources in multiple languages, referrals, and access to our weekly clinics. Landlords are offered information, KYR resources, access to our clinics, and referral back to the San Joaquin Court Self-Help Center and the San Joaquin Bar Association Lawyer Referral Service for additional assistance. Providing services via phone and Zoom provides greater access to clients with disabilities, health concerns during COVID-19 and beyond, and transportation barriers to accessing services located in a brick-and-mortar office or courthouse. The CRLA San Joaquin Housing Helpline will be open Monday, Wednesday, and Fridays from 9:00 am to 12:00 pm and 1:00 pm to 4:00 p.m. Answer and trial preparation clinics will be held once a week.</p>	\$132,000
4	Central California Legal Services	Guardianship Project	Fresno	<p>This project enjoys a successful record of assisting eligible self-represented litigants obtain guardianships for minor children, many placed with family or referred by Child Protective Services. COVID closures disrupted services during 2021; both parties anticipate that, by mid-2022, the project will again be fully operational. Staff members from the Fresno Superior Court Probate Division, the Fresno County Law Library, and CCLS will participate in twice-monthly workshops presented on first and third Friday mornings; however, as the format of the workshops remains fluid due to COVID-19 restrictions, the Court cannot commit at this time to in-person workshops.</p> <p>During the workshops, the forms are explained to participants as they follow along on their own forms, filling in the required information and/or taking notes to complete the forms at a later time. This allows the presentations to proceed within the workshop's timeframe, leaving sufficient time to respond to questions litigants may have. Once the forms are completed, litigants may contact CCLS and/or Probate Court staff for final review prior to submitting the forms to the Court for filing. This further ensures the forms are properly completed. The project serves all parties; however, those opposing a guardianship rarely attend or inquire about services.</p> <p>The Court supports the partnership and values the direct benefit provided for those navigating the guardianship process. Participants accurately complete and timely file their documents, saving money and frustration.</p>	\$70,000

Attachment A9 Summary of 2023 Partnership Grant Proposals

5	Community Legal Aid SoCal	Norwalk Consumer Debt Series	Los Angeles	<p>Community Legal Aid SoCal seeks to expand a consumer debt workshop at the Norwalk Courthouse to provide litigants with help through the life cycle of a debt case; this popular workshop ended in 2020. The objective of this program is to make the debt collection legal process more accessible and understandable to pro per litigants and guide them through this process no matter the stage they seek assistance.</p> <p>The project assists pro per litigants from the earliest stage of a debt collection matter (such as the receipt of a letter demanding payment on a defaulted debt) to those who have been served with a collection lawsuit and those preparing for trial. The project is also useful for litigants who are subject to collection/enforcement activities following entry of a debt collection judgment.</p> <p>Following conversations with Court staff, CLA SoCal seeks to expand this project into a four-workshop series that will walk litigants through the full litigation cycle: Overview & Answer, Discovery, Settlement/Motions/Evidence/Getting Ready for Trial, and Post-Judgment Actions.</p> <p>The project will be staffed by an attorney and a bilingual paralegal. While the project is open to both debtors and creditors, it is designed to help low-income litigants who are opposed by a party represented by counsel. In this way, the Consumer Debt Project increases the community's access to the justice system and will help bridge the gap of unmet needs of low-income individuals and families. All services are free.</p>	\$34,000
6	Community Legal Aid SoCal	Orange County Consumer Debt Series	Los Angeles	<p>Community Legal Aid SoCal and Public Law Center (PLC) propose to expand on a consumer debt workshop that began in 2019. The objective of this program is to make the debt collection legal process more accessible and understandable to pro per litigants and guide them through this process no matter the stage they seek assistance. All services are free, and partners intend to hold workshops at PLC's space across from Central Justice Center in Santa Ana.</p> <p>The project assists pro per litigants from the earliest stage of a debt collection matter (such as the receipt of a letter demanding payment on a defaulted debt) to those who have been served with a collection lawsuit and those preparing for trial. The project is also useful for litigants who are subject to collection/enforcement activities following entry of a debt collection judgment.</p> <p>This project will be a four-workshop monthly series that walks litigants through the full litigation cycle: Overview & Answer (twice monthly), Discovery & Motions, and Settlement/Evidence/Getting Ready for Trial. The project will also allow for collaboration on a series of Debt videos for litigant education.</p> <p>The project will be staffed by an attorney and paralegal. While the project is open to both debtors and creditors, it is designed to help low-income litigants who are opposed by a party represented by counsel. In this way, the Consumer Debt Project increases the community's access to the justice system and will help bridge the gap of unmet needs of low-income individuals and families.</p>	\$69,000
7	Community Legal Aid SoCal	Compton Self-Help Economic Expansion Project Year 2	Orange	<p>The Compton Self-Help Center Economic Expansion Project (EEP) expands capacity for consumer debt issues and small claims issues at the Compton Superior Courthouse Self-Help Center (SHC). As COVID-19 protections expire, we are seeing an increased number of requests concerning these economic issues.</p> <p>The EEP seeks to help the Court weather the crisis by educating self-represented litigants about the small claims and consumer debt processes. It is a critical service for the Compton Courthouse, which serves communities that are home to significant economic and health disparities that have been worsened by COVID. As a result, there is a need for local capacity to help self-represented litigants who must engage with the civil legal system through collections and small claims cases.</p> <p>With a 1.0 FTE Attorney, this project allows Legal Aid staff to provide one-on-one information to and/or provide educational workshops to self-represented litigants who are at the Compton Courthouse or who are being helped remotely. Primary goals are to help litigants understand the legal process, and correctly complete documents. Litigants who would benefit from additional services, would be referred to a regional legal aid organization based on their zip code and/or referred to the County of Los Angeles' Department of Consumer and Business Affairs (DCBA).</p>	\$91,000

Attachment A9 Summary of 2023 Partnership Grant Proposals

8	Elder Law & Advocacy	Imperial County Elder Abuse Technology Project	Imperial	<p>The Imperial County Elder Abuse Technology Project is intended to serve older adult and low-income self-represented litigants, including those who are limited or non-English speakers, and offer services at the central Imperial County Superior Court. The goal for each participant is that they will be able to gain legal information regarding Elder Abuse Restraining Orders, if a Restraining Order is appropriate for their situation, and successfully complete the necessary paperwork to submit a request and/or answer.</p> <p>The project will be comprised of two fully accessible kiosks located within the Imperial County Courthouse, along with an available attorney and an assistant to guide participants in the process. The kiosk will guide eligible participants through the process of a restraining order in a step-by-step manner in order to facilitate accurate completion of the required forms.</p> <p>Elder Law & Advocacy (EL&A) will work to serve residents of this geographically large, diverse, and underserved county. Meetings between EL&A and the Court will consist of in-depth discussions of matters concerning ongoing clinic operations and will result in changes where indicated.</p>	\$105,000
9	Family Violence Law Center	Domestic Violence Pro Per (DVPP) Project	Alameda	<p>The Domestic Violence Pro Per (DVPP) Project is a collaborative project of Family Violence Law Center (FVLC), Legal Access Alameda (LAA, formerly Volunteer Legal Services Corporation of the Alameda County Bar Association (VLSC)), and the Self-Help Center of the Superior Court of California, County of Alameda (SHC). The DVPP project increases access to legal services for pro per litigants in South Alameda County by serving self-represented litigants from across South Alameda County in Domestic Violence Prevention Act restraining orders via services offered at the Hayward Hall of Justice and/or virtually via Zoom, reaching more litigants in 2021 than in any prior year. Project partners will meet the needs of self-represented litigants, including those with limited English proficiency, in domestic violence and family law matters by implementing the following objectives: 1) FVLC, LAA and SHC will hold a joint weekly Domestic Violence Petitioner Clinic for DVPA petitioners at the Hayward Hall of Justice (or virtually if required for public health reasons or by court closures), staffed by a FVLC attorney, FVLC pro bono attorneys and law clerks, SHC staff and volunteers, and/or LAA pro bono attorneys; 2) SHC will provide assistance to both DVPA respondents and petitioners, and LAA will provide assistance through an existing LAA family law clinic; and 3) LAA and FVLC will continue to accept referrals from SHC and the clinics for legal representation as resources allow.</p>	\$25,000
10	Inland Counties Legal Services	Consumer Rights Clinic EXPANSION	Riverside, San Bernardino	<p>Currently the Consumer Rights Clinic ("CRC") is a successful partnership between ICLS and the San Bernardino Superior Court providing legal assistance to unrepresented indigent consumers with debt collection lawsuits.</p> <p>This application expands the project to the Riverside Superior Court.</p> <p>The project will fund an attorney, a paralegal, and a legal secretary and builds upon a document automation application (created for the project with non Partnership funding) that allows consumers to respond, propound discovery, and attempt settlement with opposing counsel. All documents produced are reviewed by an attorney.</p> <p>As public health restrictions allow, the San Bernardino Superior Court (at the Justice Center, Central District) and the Riverside Superior Court (at the Riverside Self Help Center) will provide space for ICLS to operate and make referrals to the Clinic.</p> <p>Staff will serve pro se defendants in the courthouses or virtually on a regular schedule preparing responsive pleadings and settlement offers. Staff will attempt to settle/dismiss cases as soon as possible. The ICLS attorney will not represent the client on the record or appear in court on the clients behalf. Through counsel and advice and document preparation, the goal is to increase access to justice for clients and alleviate the demand on the court's time by resolving cases expeditiously.</p> <p>ICLS has mastered the process of working with clients and volunteer attorneys remotely and has the ability to operate remotely at any time when public health restrictions are in effect.</p>	\$151,000

Attachment A9 Summary of 2023 Partnership Grant Proposals

11	Justice & Diversity Center of the Bar Association of San Francisco	FLASH	San Francisco	<p>The Justice & Diversity Center of the Bar Association of San Francisco (JDC) requests a Partnership Grant to operate the Family Law Assisted Self Help (FLASH) project, which provides legal assistance to indigent Self-Represented Litigants (SRLs) at the San Francisco Superior Court (Court), via its ACCESS Center. Services consist of direct legal assistance to SRLs on the Family Centered Case Resolution (FCCR) Calendar, where cases that have failed to conclude are called. The FLASH Attorney works with income-qualified litigants on this calendar and thereafter to complete their matters. The FLASH Attorney also meets one-on-one with SRLs referred by the ACCESS Center throughout their cases. She provides information and guidance and drafts all necessary pleadings for SRLs who cannot complete their paperwork without her assistance.</p> <p>As a result of the COVID-19 pandemic, JDC has developed innovative methods to communicate and interact with SRLs. Our intake form has been converted to an electronic fillable document so the ACCESS Center can complete the initial set of pleadings for each SRL. Additionally, we have added text communication capability as most of the FLASH Attorney's low-income clients are unable to use video-conferencing.</p> <p>In March 2020, the Court ended Mandatory Settlement Conference (MSC) Workshops and, indeed, all workshops or group meetings. The Court now refers litigants directly to JDC when income-qualified SRLs need help with MSCs and MSC Statements. The FLASH Attorney works individually with these clients to complete the extensive MSC Statement and to prepare to present their cases at the MSC.</p>	\$70,000
12	LACBA Counsel for Justice	Domestic Violence Legal Services Project (DVP)	Los Angeles	<p>The LACBA Counsel for Justice Domestic Violence Legal Services Project (DVP or Project) assists self-represented litigants in restraining order cases. DVP provides legal information, referrals, and individual services with court forms such as requests, responses, and renewals. The main goal of the Project is to bridge the access to justice gap for restraining order litigants in these complex cases by providing information and forms preparation; thereby enabling litigants to make informed choices about their legal problems and properly present their issues to the court. DVP recruits and trains volunteer lawyers and law students who work one-on-one with litigants to prepare the court forms with review by the Project Attorney. DVP also operates two self-help kiosks where litigants prepare their own forms using the Court's web-based forms production program, with review by the Project Attorney. DVP is located on the second floor of the Stanley Mosk Courthouse, along with the Restraining Order Center and Family Court Services. DVP is open Monday-Thursday from 8:00-12:00 and 1:00-3:30 and Friday from 8:00-12:00. The Project is staffed by a Project Attorney and a Paralegal who work with litigants and assist and supervise volunteers. DVP's Directing Attorney is responsible for overall supervision and direction of the Project. As it has for over 30 years, DVP works closely and continuously with the Court on issues including cross-referrals, program development, and evaluation.</p>	\$104,000
13	Legal Access Alameda	Family Law Status Conference Clinic	Alameda	<p>The Family Law Status Conference Clinic ("FLSC Clinic") offers assistance to litigants appearing on Self-Represented Litigant Family Law Status Conference calendars in a family law department. This program brings a Legal Access staff attorney (the FLSC Attorney) on-site to provide expanded services to litigants and oversight of volunteer attorneys.</p> <p>The FLSC clinic assists with Dissolution, Legal Separation, Nullity, and Parentage cases. Clinic staff (the FLSC attorney and Self-Help staff) and volunteers help litigants understand case procedure and complete or correct necessary forms, with the ultimate goal of assisting litigants in moving their cases to a final resolution, either by completing a judgment or referring the case for trial setting. This helps the court with the status conference compliance requirement under CRC Rule 5.83(c)(2) and facilitates more efficient support to litigants with on the spot assistance and by identifying issues early on in the process.</p> <p>Before CoVid19, the FLSC clinic occurred Tuesday and Thursday afternoons, and some Friday mornings, providing all services in person. In 2020 the FLSC department started holding all hearings via BlueJeans video conference and consolidated all FLSC clinic cases to Tuesdays. While providing services remotely, clinic staff send litigants required forms via email and mail. The FLSC Attorney also sends letters to litigants before each clinic, which include description of how to complete the next step, required forms and filing options. The FLSC has operated remotely since 2020 and Legal Access will continue to work with our court partners to provide services remotely in 2023 if necessary.</p>	\$65,000

Attachment A9 Summary of 2023 Partnership Grant Proposals

14	Legal Access Alameda	Family Law Day of Court	Alameda	<p>Legal Access Alameda's Family Law Day of Court Clinic (FLDOC) is an in-court clinic where volunteers take referrals directly from the bench on the Family Law Pro Per Request for Order (RFO) calendars. In Alameda County, self-represented litigants (SRLs) are generally assigned a specific day on each Family Law Department's calendar. Each clinic is staffed by a supervisor, either the FLDOC Supervising Attorney or a Self-Help staff person, and one to three volunteers. Volunteers and clinic staff work closely with judicial officers and courtroom personnel. The clinic seeks to assist all SRLs whose cases are set on the RFO calendar and who appear for their hearing. The hearings are short-cause hearings that are generally for child custody, visitation, and support.</p> <p>FLDOC provides assistance to the six non-DCSS family law departments on their pro per RFO calendars. These calendars occur in the morning or afternoon, several times per week. The FLDOC clinic has provided services remotely via BlueJeans since May 2020 and will do so in 2023 if necessary.</p> <p>The primary goal of the clinic is to provide SRLs with signed, clear, and enforceable orders as soon as possible after their hearing. Clinic staff and volunteers draft the orders immediately after the hearing, and submit proposed orders for the judge's signature and filing by the court clerk. FLDOC also assist SRLs by clarifying the newly-issued orders, explaining legal terms and court procedures, completing necessary paperwork, and running child and temporary spousal support calculations.</p>	\$25,000
15	Legal Aid Foundation of Los Angeles	2023 - Torrance Self Help Partnership Grant	Los Angeles	<p>Legal Aid Foundation of Los Angeles (LAFLA) is applying for continuation funding to supplement staffing at the Torrance Self-Help Legal Access Center ("center") in the Torrance Courthouse and provide expanded services in Family Law, Restraining Order and Landlord-Tenant cases. The staff has recently resumed on-site services to target urgent housing and restraining order related matters and continues to handle referrals from the Court's self-help phoneline while maintaining Self-Help remote services. This grant application seeks to help the Center further integrate service hybridity (combining simultaneous on-site and off-site services) and grow our onsite capabilities in the space allocated by the Court at the Torrance Courthouse. As we hope to continue re-emerging from the Covid-19 public emergency health crisis ("health crisis"), the center shall serve as an important legal oasis for litigants living on the wrong side of the digital divide.</p>	\$100,000
16	Legal Aid Foundation of Santa Barbara County	LRC Partnership	Santa Barbara	<p>LAFSBC proposes to continue Partnership funding for a self-help attorney for the civil Legal Resource Centers (LRC) and a part-time assistant. Until the hiring of a 3rd LRC attorney with Partnership funds in 2020, the staffing level of the Legal Resource Centers had not increased for at least 15 years. In calendar year 2021, the LRCs countywide served over 6,000 self-represented litigants in civil matters. We seek to continue our 2022 project. The LRC partnership attorney will work 1 day per week in person at the Lompoc courthouse. On the remaining days, the bilingual LRC Partnership attorney will assist SRLs countywide by phone, email, or videoconference, with a focus on mid and south county residents. The LRC assistant will provide in-person bilingual support to the LRC at the Santa Barbara courthouse and other data entry assistance. The other two attorneys, funded separately, will cover in-person services Santa Barbara and Santa Maria. We believe that by providing a combination of remote and in-person services, we will best meet the needs of residents across the 75 mile length of our county.</p>	\$138,000
17	Legal Aid of Marin	Homelessness Prevention Through Mandatory Settlement Conferences	Marin	<p>Established in 2012, the Marin Superior Court Unlawful Detainer Settlement Conference Program is recognized by the Judicial Council as an innovative, efficient and effective trial court program for unlawful detainers (https://www.courts.ca.gov/27438.htm). Before physical access to courts was limited by COVID, Marin Superior Court and Legal Aid of Marin collaborated to offer Conferences in the week before trial for all unlawful detainer cases. The Court provides general oversight, and Legal Aid of Marin staff and Pro Bono volunteers recruited and trained by Legal Aid of Marin staff meet with unrepresented parties in each case (both landlords and tenants) and attempt to resolve the cases.</p> <p>When the parties are successful, they draft settlement agreements, signed by both parties, and present them to the Court. To date, over 87% of cases reached agreements - an excellent measure of the program's effectiveness. Agreements include tenancy preservation, case dismissal, rent forgiveness, and time to relocate. Even when tenants do move, having appropriate time and required funds, together with avoidance of an eviction judgment, go far to prevent immediate and future homelessness.</p> <p>The Partnership Grant affords Marin Superior Court and Legal Aid of Marin the opportunity to adapt this innovative, effective program to the COVID and post-COVID environment. The partners will employ alternative technologies to facilitate settlement conferences, and model protocols that take into account new local and state legal protections that emerge in response to the COVID pandemic and its aftermath.</p>	\$80,000

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18	Legal Aid Society of San Bernardino	CSEAJ - PROBATE PARTNERSHIP 2023	San Bernardino	<p>Legal Aid Society of San Bernardino (LASSB) will provide direct legal services to qualifying Pro Se litigants to resolve Small Estates, Conservatorship, and Guardianship actions. LASSB will use grant funds to help litigants reached through marketing efforts or court referrals. The project will not include legal advice. Provision of general information will eliminate establishing an attorney-client relationship to allow the project to assist all qualifying court patrons. LASSB will provide general information, review existing documents and prepare documents needed for case completion. The Court will refer litigants to the project and provide specific instructions on case document preparation in some cases. The Court will provide space, IT support, security, and janitorial services, ACIS access, and more.</p> <p>General information will include legal aspects and clarification of terms or conditions. LASSB will prepare corrected or missing pleadings, assist with pre-and post-hearing tasks, and provide procedural assistance to facilitate immediate filing and processing of their casework.</p> <p>Project services will be provided in English and Spanish, Mon.-Thur. 9 am-12:30 pm and 1:30 pm-4 pm within the Justice Center. Litigants will benefit by attaining information, securing missing or corrected pleadings, and completing required tasks. The project will allow efficient case processing, reduce the number of visits to the courthouse, and reduce litigants' confusion and stress. It will eliminate delays in resolving small estates and ensure disabled adults and beloved minors attain access to daily care and healthcare services despite being disabled or estranged from their parents. The project will reduce case backlog and the Court's administrative costs.</p>	\$159,000
19	Legal Aid Society of San Diego	South Bay Restraining Order Project	San Diego	<p>In partnership with the San Diego Superior Court, the Legal Aid Society of San Diego (LASSD) Pro Bono Program seeks to offer a full-time Domestic Violence/Civil Harassment/Elder Abuse Restraining Order Clinic at the South County branch of the San Diego Superior Court. The Court has expressed the need for daily full-time services to assist the rising number of South County residents seeking protection from violence, stalking, sexual assault, elder/dependent adult abuse, and severe harassment. The project would operate daily in the South County Regional Center branch court from 8:30 a.m. to 12:00 p.m. and 12:30 p.m. to 4:00 p.m., Monday through Friday, providing assistance with court forms, explanation of the law, options and alternatives, and referrals.</p> <p>The program will be staffed with one staff attorney, one advocate, and volunteer attorneys and students. Ongoing communication with court personnel will create a collaborative program that benefits both the court and self-represented litigants in having appropriate paperwork processed efficiently.</p> <p>The main goals of the program are to help self-represented litigants access and fully participate in the legal system, and educate litigants so they can make informed choices resulting in effective and efficient filings for the litigant and the Court. Helping litigants complete necessary paperwork ensures that the Court receives the information necessary to render a decision on a temporary restraining order that day. By providing these services, the program helps pro per petitioners protect themselves from dangerous situations, and helps pro per respondents protect their due process rights by properly responding to petitions.</p>	\$120,000
20	Legal Aid Society of San Diego	Name Change & Gender Change Self-Help Clinic	San Diego	<p>In partnership with the San Diego Superior Court, LASSD seeks funding to operate the Name Change & Gender Marker Change Self-Help Clinic in 2023. This project fills a gap in the San Diego County self-help services, as there are no other court-based projects providing services related to this substantive legal area. The aim of the project is to help indigent, self-represented litigants fully participate in the legal system when in need of a name and/or gender marker change by providing one-on-one assistance to participants, including document preparation and information on the court process. Providing services to self-represented litigants in this area will not only help and educate the litigants but will also help the court by cutting down on time spent by clerks and the court on litigants navigating the court process without assistance. The advent of the Real ID in California has increased the need for assistance with name changes. People who seek Real IDs discover that their documents do not match and need assistance obtaining a decree of name change in order to obtain the Real ID.</p>	\$85,000

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21	Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	Alameda	The Partnership to Assist Limited Conservatorship Litigants is a collaborative effort of Legal Assistance for Seniors (LAS), Legal Access Alameda of the Alameda County Bar Association (LAA) and the Alameda County Superior Court. The Partnership will provide legal assistance to low income, pro per litigants in limited conservatorship cases. Limited conservatorship cases have complex procedural requirements that are often daunting to pro per litigants who are typically more focused on providing and coordinating the care needed for their loved one. Many of the litigants in Alameda County do not speak English and have trouble navigating the legal system, which can lead to delays in their ability to provide adequate care. This Project allows the Partners to meet a currently unmet need in Alameda County. Partners will assist with temporary petitions, general petitions, objections, orders after hearing and other petitions necessary to meet procedural requirements. The partners will develop sample documents and instructions designed to assist with local rules and the complicated procedural process. The litigants will be assisted at workshops with one workshop a month dedicated to the complex notice requirements in these matters. Virtual assistance and one-on-one assistance will also be provided. LAA volunteers and LAS staff will assist litigants at their court hearings when needed. The goal of the partnership is for the partners to use their experience assisting pro per litigants navigate with the complex procedural requirements of limited conservatorship cases and to avoid multiple continuances that take up court resources and frustrate litigants.	\$50,000
22	Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	Alameda	The Partnership to Assist Guardianship Litigants is a collaborative effort of Legal Assistance for Seniors (LAS), Legal Access Alameda of the Alameda County Bar Association (LAA) and the Alameda County Superior Court. The Partnership will provide legal assistance to low income, pro per litigants in guardianship cases. Partners will assist with all aspects of these cases including temporary petitions, general petitions, objections, adding or removing co-guardians, petitions for visitation and petitions for termination. The partners will develop sample documents and instructions designed to fill in any potential gaps caused by the reduction in court services, including reduced filing hours and the elimination of Probate Examiner phone hours. The Partnership will hold weekly workshops to assist with filing requirements. One of the weekly workshops will be dedicated to the complex notice requirements that often result in continuances for the litigants. We will also incorporate lessons learned during COVID and may provide one of the workshops remotely for litigants unable to travel to the courthouse. LAA volunteers and LAS will provide day of court assistance when the pro per cases are calendared. The day of court assistance includes explaining the procedural deficiencies keeping the cases from being heard, providing forms allowing the litigants to draft declarations to address the procedural issues and assisting with filing documents. The goal of this program is to navigate litigants through the complex procedural process required in guardianship cases, providing low income litigants access to justice while also reducing continuances and preserving court resources	\$55,000
23	Legal Services of Northern California	Yolo Consumer Clinic	Yolo	Legal Services of Northern California's Yolo County office (LSNC) and the Yolo County Superior Court propose to provide a free Consumer Clinic for low income people to address the rise in consumer lawsuits exacerbated by the pandemic. The Clinic is targeted at the 48,465 Yolo County residents living below 125 percent of the federal poverty level, with a focus on serving low-income litigants with language, literacy, or technology barriers. These groups need free legal assistance in consumer cases because they have difficulty accessing the Court and have been hardest hit by the economic crisis caused by the pandemic. Of the estimated 220,500 people who live in Yolo County, 38 percent speak English less than "very well," 20.8 percent speak only Spanish, and 7.7 percent lack basic literacy skills. 2,638 people in Yolo County reside in rural areas with limited internet services and broadband speed rates substantially below the California standard. The project is unique to the region and will ensure that all consumer litigants have equal access to the Court. LSNC's Yolo staff attorneys will rotate providing twice-a-week one-on-one legal assistance in consumer law cases through a 20 percent full time equivalent position. LSNC will also offer mediation during the small claims court calendar, with a focus on pandemic rental debt and collection cases. The project will assist with the unmet need for pro per legal assistance in consumer law cases, reduce court clerk time spent with self-represented litigants, and promote judicial economy.	\$39,000
24	Neighborhood Legal Services	San Gabriel Valley - Remote Services - Housing	Los Angeles	NLSLA will expand its partnership with the Superior Court of California, County of Los Angeles ("Court") to support vulnerable self-represented litigants in the underserved geographic area of the San Gabriel Valley. Specifically, the project will focus on providing housing assistance via remote technology to residents living in Glendale, Pomona, and West Covina - areas with limited access to Self Help housing services, especially with many Stay-Housed providers currently overwhelmed. The team would assist litigants with education and information on how to navigate the Unlawful Detainer ("UD") process for pre-UD matters such as Reasonable Accommodation letters, illegal lockout letters, harassment complaints, and habitability requests. It will also hold monthly virtual workshops to provide additional guidance for tenants and/or landlords on topics such as the post-judgement process. Additionally, this project will work with the Court to promote and develop an array of web-based tools and interactive materials to educate the public on these and other collaterally related housing issues for community members throughout Los Angeles County. The project will be conducted remotely collaborating with the Self-Help Legal Access Centers ("SHLAC"). The hours of operation will be during SHLAC operating hours. The project's staffing will include NLSLA supervising attorney, staff attorney, support staff, and volunteers. The remote team under this project will work closely with staff on-site at the courthouses and provide technical assistance to the Court and SHLAC staff as needed. The Court's participation will include identifying and referring litigants. Moreover, the Court will play a vital role in evaluating the services.	\$124,000

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25	Neighborhood Legal Services	STABILIZING FAMILIES PROJECT	Los Angeles	<p>NLSLA aims to continue the “Stabilizing Families” project to support self-represented litigants through the Probate Guardianship process. This will include education on alternative options, document preparation, service requirements, clearing probate notes, and preparing Letters and Orders. This advocacy will provide an option to litigants, who otherwise cannot afford legal representation throughout the long process of probate guardianship, which is focused on empowerment and education. The program will provide assistance to litigants seeking information and support to obtain, object to, or terminate a legal guardianship, with resources and support offered at all stages.</p> <p>The program will operate in conjunction with the Self-Help hours of operation: 8:30am – 4:30pm. An NLSLA attorney will rotate between the Antelope Valley and Van Nuys courthouses, to offer both remote and on-site support to litigants. Following the Self-Help model, there will be no attorney-client relationship between the staff attorney, no court appearances, and no legal advice will be provided to litigants. The program’s main goals are to alleviate the confusion with probate guardianships through targeted education and provide assistance to litigants who are navigating their ways through process.</p>	\$105,000
26	Neighborhood Legal Services	POMONA - READY FOR TRIAL!	Los Angeles	<p>NLSLA proposes its “Intensive Family Law Trial Preparation” called “Ready for Trial!” project to support self-represented litigants in family law cases. NLSLA will hire a lawyer who will provide trial preparation workshop and clinic out of the Pomona Courthouse which will consist of two parts. The first clinic will educate and assist individuals in completing their trial brief and other trial forms. The second part of the workshop will aim at familiarizing a litigant with what a trial day looks like by walking them through check in and the basics on where to stand and how to address the court. A Spanish version of the workshop will be provided where issues like presenting evidence in a different language and working with court interpreters will be addressed. The project hopes to create a video that captures what a day at family court trial look like that can be easily shared across the county. The goal of the project is to demystify and remove the anxiety and stress litigants face when going to trial. The hope is that litigants will leave the workshops and clinics with confidence in their own ability to represent themselves in court.</p>	\$120,000
27	Neighborhood Legal Services	PASADENA - CONTINUUM OF SERVICES	Los Angeles	<p>Neighborhood Legal Services of Los Angeles County (“NLSLA”) proposes to continue its project in the Pasadena Courthouse to maintain assistance with UD Answers and serve as a triage on cases that should be placed on the continuum of services for the San Gabriel Valley. The California Governor has made Housing the State’s number one priority and has called on all leaders – both state and local to provide critical services, including homelessness prevention efforts. Both the County and City of Los Angeles visualized a Right to Counsel project. As the first steps towards this Right to Counsel effort, the joint powers partnered with legal aid organizations to create Stay Housed L.A, a robust eviction and homelessness prevention effort. This project brings much needed tenant defense resources to the community.</p> <p>Unfortunately, the need is great and even with the Stay Housed L.A. resources, they simply cannot meet the need and provide assistance to all tenants presenting with eviction cases at the Pasadena Courthouse. The Unlawful Detainer (UD) process is an expedited one and it is difficult to meet the needs of the numerous tenants presenting who must file an Answer to the UD especially given the quick five-day response deadline under the statute. To fill the gap in services, it is essential to fund an attorney from NLSLA to help maintain the continuum of services for housing cases at the Pasadena Resource Center for at least four days a week, 8:30 am to 4:00 pm.</p>	\$115,000
28	Public Law Center	DeFacto & Adoptive Parent Assistance Project	Orange	<p>The Orange County Superior Court sought a project partner to support adoptive parents in Juvenile Court proceedings, so the Court can use limited funds for contract attorneys for minor/parent representation. Without this project (and the complementary pro bono placement services PLC’s Family Law Unit provides), de facto parents in Dependency Court termination of parental rights proceedings are at risk of becoming the only parties unrepresented by counsel. De facto parents often become adoptive parents and likewise could go through that process without counsel. PLC’s DeFacto & Adoptive Parent Assistance Project provides guidance and resources to unrepresented de facto parents and adoptive parents. Where appropriate, the Project also informs litigants about the benefits and options for finding pro bono counsel. When appropriate, participants will be referred out of the Project to PLC’s Family Law Unit for placement with trained pro bono counsel.</p>	\$50,000

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29	San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	San Diego	<p>The Central Division Restraining Order Clinic (CDROC) is a collaboration between San Diego Volunteer Lawyer Program, Inc. (SDVLP) and the San Diego Superior Court (Court) to assist domestic violence survivors and survivors of elder or dependent adult abuse in obtaining legal protection and referrals for legal and social services providers. SDVLP staff and volunteer attorneys at the CDROC provide one-on-one assistance to survivors of abuse by preparing Domestic Violence, Elder Abuse or Dependent Adult Abuse Restraining Order (DVRO) applications, which survivors file in pro per. The days and hours of operation of the CDROC are Monday through Friday, 8:30 a.m. to 5:00 p.m., excluding court holidays. The CDROC is located on the 4th floor of the Central Courthouse at 1100 Union Street, San Diego, CA 92101.</p> <p>In addition to one-on-one legal assistance, the CDROC will hold virtual legal workshops and cover topics such as how to interact with the Court, and what constitutes proper service of process. The CDROC will also develop and hold virtual legal workshops for SRLs on hearing preparation and presentation of evidence. While hearings are remote, these workshops will also provide information on best practices for attending hearings virtually.</p> <p>Lastly, the CDROC will continue to create a series of short, informational videos on topics related to domestic violence, such as safety planning, the intersection between immigration and domestic violence, the impact of restraining orders on child custody, proper service of process, and how to file evidence. The CDROC will create two to five informational videos to be distributed to clients.</p>	\$130,000
30	Senior Citizens Legal Services	Indigent Landlord/Tenant Services and Mediation	Santa Cruz	<p>The goal of this innovative partnership project is to keep people safely housed by educating both sides in housing disputes and promoting mediation prior to unlawful detainer ("UD") hearings. Senior Citizens Legal Services ("SCLS") is currently partnering with the Superior Court of Santa Cruz County ("Court") and contracting with the Conflict Resolution Center ("CRC") in its first year of this partnership grant. A full-time attorney has been hired, and just recently began providing in-person, in pro per services to indigent tenants and landlords at the Santa Cruz County Law Library Monday-Friday 8-12, and at SCLS Monday-Thursday 1-4:30. CRC is set up for conducting up to 10 pre and post filing UD mediations each month, at a location designated by CRC or via zoom. Day of court mediation, at the UD calendar, is still being evaluated by the Courthouse. These brand new legal housing services will be promoted via e-mail to all non-profit, government and legal organizations in the two county jurisdiction and to the general public through media outlets and social media.</p> <p>The target population for these new services are indigent landlords and tenants from across Santa Cruz and San Benito counties. Both Santa Cruz Superior Court and SCLS already have existing partnerships with the County of San Benito, thus, except for day of court mediation, San Benito County residents will be eligible for most of these new services. All our customers will share two characteristics: they are concerned about housing and do not have private representation.</p>	\$105,000