Judicial Council *of* California

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REPORT TO THE JUDICIAL COUNCIL

Item No.: 23-154
For business meeting on September 19, 2023

Title
Equal Access Fund: Distribution of Funds to the California Access to Justice Commission

Rules, Forms, Standards, or Statutes Affected
None

Recommended by
Advisory Committee on Providing Access and Fairness
Hon. Kevin C. Brazile, Cochair
Hon. Victor A. Rodriguez, Cochair

Agenda Item Type
Action Required

Effective Date
September 20, 2023

Date of Report
August 11, 2023

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Executive Summary

The Advisory Committee on Providing Access and Fairness recommends approval of two distributions to the California Access to Justice Commission, as authorized by the Budget Act of 2023: $5 million for grants to civil legal aid nonprofits and $250,000 for administration of a tax–advantaged student loan repayment assistance program for service providers employed by qualified legal service projects and support centers.

Recommendation

The Advisory Committee on Providing Access and Fairness recommends that the Judicial Council, effective September 19, 2023, approve the following distribution, as authorized by the Budget Act of 2023:

- $5 million to the California Access to Justice Commission for grants to civil legal aid nonprofits; and
- $250,000 for administration of a tax–advantaged student loan repayment assistance program.

Relevant Previous Council Action

Since fiscal year 2021–22, the State Budget Act has directed the Judicial Council to distribute $5 million annually in Equal Access Funds to the California Access to Justice Commission for grants to civil legal aid nonprofits. A report on the grants made by the commission in the second year of funding is included as Attachment A.

Analysis/Rationale

The California Access to Justice Commission is an independent nonprofit agency. The Budget Act of 2023 provides that $5 million be distributed by the Judicial Council to the commission for grants to civil legal aid nonprofits, including qualified legal services providers and support centers, to be used to support the infrastructure and innovation needs of legal services in civil matters for indigent persons. The commission may use up to 2.5 percent of these funds for administrative costs associated with distributing and monitoring the grants.[1] This year, the Budget Act also directs the Judicial Council to distribute $250,000 to the commission for the administration of a tax-advantaged student loan repayment assistance program for service providers employed by qualified legal service projects and support centers (Links A & B).

Policy implications

This recommendation helps implement Goal I of the Strategic Plan for California's Judicial Branch—Access, Fairness, Diversity, and Inclusion. By increasing representation and supporting the infrastructure and needs of legal services in civil matters for indigent persons, these funds will expand equal access to the courts, court proceedings, and programs.

Comments

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

Alternatives considered

There is no alternative to distributing the funds in accordance with the Budget Act.

Fiscal and Operational Impacts

The funds for the California Access to Justice Commission require no court implementation because all funds will be provided as grants to legal services agencies. Council staff will develop contracts between the Judicial Council and the California Access to Justice Commission, setting out reporting requirements and responsibilities to comply with the terms of the Budget Act.

The recommendations in this report will have no direct fiscal effect on the courts. Nevertheless, courts will indirectly benefit from assistance provided to self-represented litigants.

[1] Stats. 2023, ch. 12, item 0250-101-0001, provision 2.

Attachments and Links

1. Attachment A: California Access to Justice Commission, *Legal Aid Infrastructure & Innovation 2023 Grants Approved for Funding* (Mar. 2023)
2. Link A: The Budget Act of 2023 (Sen. Bill 101; Stats. 2023, ch. 12), *https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202320240SB101*
3. Link B: Judicial Council Rep., Aug. 18, 2022, *Equal Access Fund: California Access to Justice Commission Grants,* *https://jcc.legistar.com/View.ashx?M=F&ID=11204297&GUID=6F13C8DB-71E8-43D8-A4C6-35E695DA112D*
4. Link C: Judicial Council Rep., Aug. 30, 2021, *Equal Access Fund: California Access to Justice Commission Grants*, *https://jcc.legistar.com/View.ashx?M=F&ID=9785553&GUID=9D1E060E-3A50-45FC-A3D7-990FB095A312*

Attachment A

Legal Aid Infrastructure & Innovation
2023 Grants Approved for Funding

March 31, 2023

Number of Applications Received: 73
Total Funding Amount Requested: $11,276,554
Number of Organizations Recommended for Funding: 48
Total Amount Allocated for Funding: $4,875,000

Background: For the second year, the State allocated $5 million of Equal Access Funds for Infrastructure and Innovation grants to legal services organizations to be funded through the Judicial Council and administered by the California Access to Justice Commission. Eligible organizations are those that provide civil legal aid to persons at or below 200% of the federal poverty threshold, including both IOLTA and non-IOLTA funded organizations. The legislation prioritizes services to rural and immigrant populations, and to organizations that work with community partners. Applicants were requested to focus on one cohesive project. Supplanting other funding already obtained for that project is prohibited by the legislation.

This grant program is overseen by the Commission's Grants Committee, chaired by Justice Gail Feuer. The Grants Committee met monthly to establish grant parameters, policies, and procedures, leading to the appointment of a Grants Review Subcommittee. The Grants Review Subcommittee brought diligence, wisdom, and a broad range of experience to the task of carefully reviewing and assessing the applications according to the process described below. Members of the Grants Committee and Grants Review Subcommittee are identified on Attachment 1.

Review Process: The Commission launched the $4.875 million grants program with a webinar, *Strength through Innovation and Infrastructure.* The webinar educated prospective applicants on grant requirements, review criteria, and process and procedure. Additionally, selected grantees from last year shared their creative projects with their colleagues to inspire this year's applications. The Commission released the application form on September 9, and applications were due on October 21, 2022. The Commission received 73 applications seeking a total of $11,276,554 million in funds.

The Grants Review Subcommittee was divided into three teams of three persons each. Each team included one member with significant grantmaking experience, one with extensive legal aid experience and a third bringing community service skills and expertise, including a law firm pro bono coordinator and members of the Access Commission. The Subcommittee members also

brought a range of substantive expertise, including immigration, disability rights, rural delivery, housing, pro bono, human resources, leadership development, and diversity and equity.

Three consultant staff members -- Stephanie Choy, Mary Tam and Mary Lavery Flynn -- read all of the applications. Together they sorted the applications into initial "recommend," "for committee discussion," and "do not recommend" categories based on the scoring rubric that was approved by the Grants Committee. Each team was assigned a third of the applications to review. Teams were invited to review all of the applications in that subgroup, but were requested to focus on those "for committee discussion." The teams met in two 2-hour meetings to thoroughly discuss applications and to re-sort the applications into "high recommend," "recommend" and "do not recommend" for the full Grants Review Subcommittee to discuss. The full Subcommittee then met in a series of three two-hour meetings to make the final selection among the "high recommend" and "recommend" categories. As a result of the careful reading, analysis and robust discussions, 48 applications were recommended for funding, totaling $4,875,000 in proposed grants. The scoring rubric is Attachment 2.

The subcommittee looked at the caliber of the grants and the significance of the proposed outcomes, as well as the amount of the funding requests relative to the project scopes. In some cases, grants amounts requested were reduced, or discrete portions of the application were carved out for funding. In recommending reductions, the subcommittee looked at the extent to which there were components of a project that could be removed without harming the project, and other factors. The Grants Committee and Executive Committee conditionally approved grants for funding, subject to submission of additional information, including to address how any reduction in proposed funding would impact the project scope. Staff reviewed detailed budgets, proposed staffing, evaluation plans, project details and other organization documents, and released grant agreements for signature.

Grant Applications: Of the 73 grant applications received, 26 were from non-IOLTA funded organizations, and over 45 applications were from organizations with budgets under $5 million. This year, the Grants Committee tasked the consultant staff with video interviews with the non-IOLTA funded organizations that do not already have grants with the Commission. Mary Tam and Stephanie Choy interviewed 24 of the applicants, including both small and large organizations, as well as relatively new organizations led by developing leaders. A high-level breakdown of the diversity factors that were considered in the selection of these grants is on the next page.

Infrastructure and innovation grants have in common the potential to make a long-term difference in the ability of the organization to serve more clients, with greater efficiency and increased quality. Without dedicated funding, development of long-term strategies often are perceived as out of reach given the pressing demand to serve the clients at the door. Whether framed as an "infrastructure" or an "innovation" grant, these grants have potential for far-

reaching impact, and serve a range of constituencies including, immigrants, seniors, veterans, workers, and children.

Indicative of the need for services for immigrants, a large proportion of grants will address the tremendous need in immigrant communities. One grantee proposes to provide asylum workshops to underserved LGBT immigrants living in the far rural north, while another proposes to provide holistic services to immigrants in the far south, at the borders of San Diego and Imperial Counties. Organizations focus on different key constituencies, with several organizations working with survivors of trafficking. Organizations serve immigrants from different countries of origin including Latinx, Asian, Haitian, Ukrainian, and Afro Caribbean. One grantee will focus on expanding its organization's ability to handle immigration appeals. Another program is building leadership within the immigrant community by teaching Asylees to lead workshops to teach other asylum-seekers to represent themselves in hearings.

Several of the immigration programs involve deep partnerships, including formal collaborations. For example, one program has developed software that provides clients and the pro bono attorneys, or immigration programs that represent them, with client-specific court information, such as scheduled hearing dates. That program is working with a collaborative of immigration organizations to share information needs, develop text and social media communication alerts, and track trends. In another strong collaboration, one program is working with a community-based organization serving the Latinx community to create a Spanish advocacy website, complete with template-based advocacy tools, that fosters community engagement to fight violence in their rural school district.

As was true of grants made last year, many of the grant projects propose infrastructure improvements. Some are as simple as buying computers capable of running current software, while others require an expert consultant to help integrate complicated systems for case management, financial information, human resources, and other information. This year because of the small size of many organizations seeking support, many of the applicants seek grant funding to create new staff capacities, envisioning that once in place the new staff person will not only be able to advance the organization, but also position the organization to fund those key capacities in the future.

Selection was extremely challenging due to the high caliber of the grant applications. The number and strength of the applications demonstrates yet again that there is an overwhelming need for these infrastructure and innovation funds. The legal aid community is positioned to put the funds to good use.

SUMMARY OF DIVERSITY CHARACTERISTICS

(Note: Organizations may serve more than one geographic area, meet more than one legislative priority, or cover more than one project category.)

INFRASTRUCTURE vs. INNOVATION

69% Infrastructure (33)
31% Innovation (15)

Total applications =
74% Infrastructure
26% Innovation

NEW vs. RETURNING*

20 New Grantees
28 Returning Grantees

**New grantees vs. grantees that received 2021-2022 funding*

GEOGRAPHY*

16 Statewide
8 Central Valley
17 Northern California
14 Southern California

**Counties served through the project, per application*

IOLTA vs. NON-IOLTA

65% IOLTA (31)
35% NON-IOLTA (17)

Total applications =
64% IOLTA
36% NON-IOLTA

ORGANIZATION SIZE

8 < $1MM
26 $1-5MM*
5 $5-10MM
8 $10-20MM
1 > $20 MM

**34 applications received with $1-5MM budget*

LEGISLATIVE PRIORITIES*

29 Serve Rural
38 Serve Immigrants
16 CBO Partnership

**Priorities self-reported on their application*

PRO BONO

12 Pro Bono*

**Includes where pro bono is a component of the funded grant project and where the organization utilizes significant pro bono services*

PROJECT CATEGORIES

Enhanced Programming (4)	Administrative Infrastructure (7)
Expanded Programing (8)	Strategic Planning (2)
Backbone Support (5)	Case Management Systems (8)
Legal Services Statewide Capacity (10)	Hardware / Software (3)
Diversity, Equity & Inclusion (2)	Website & Online Tools (4)

2023 Grants Approved for Funding	
Description of Funded Project	**Grant Amount**
African Advocacy Network (AAN) provides civil legal and social integration services for African and Afro-Caribbean immigrants in the 9 Bay Area counties, with linguistic capacity in more than ten languages. AAN has grown from 300 to 3000 sq ft and 6 to 13 staff. It is black-immigrant led organization that needs a legal director to establish strong cross-dept work, program planning, human resources, data management and organizational goal setting to streamline efficiencies and processes.	$125,000
Al Otro Lado works to ensure equitable access to legal services by providing written, audio, and video materials in numerous languages, with a focus on reaching underserved Black and Indigenous migrants, and disabled or medically vulnerable persons. It is a cross-border org that leverages thousands of volunteers, coalitions and technology to serve 10,000 migrants a year. Al Otro Lado will hire a data analyst to help it think through how it collects, analyzes and stores data to enable it to more quickly understand and respond to shifting constituencies at the border.	$125,000
Alliance for Children's Rights (the Alliance) provides legal services to underserved children, young adults, and families in LA's child welfare system. The Alliance needs new financial management software designed specifically for nonprofits to replace its currently siloed financial processes with a single, central, and collaborative financial platform. Better grasp of its finances will allow the Alliance to move from a reactive model to a proactive, strategic operational position, while saving countless hours of data entry.	$120,000

Asian Pacific Islander Legal Outreach (APILO) provides culturally competent and linguistically appropriate legal representation, social services, and advocacy for the most marginalized segments of the Asian and other BIPOC communities. APILO will use the grant to engage in a long overdue administrative infrastructure process. The pandemic brought into sharp focus the urgent legal needs of constituents from surging domestic violence, to isolated seniors, to collapsing cultural districts, to constant anti-API hate. APILO anticipates using funds to hire a consultant to assess the efficiency of administrative operations as a component of its long-range strategic plan to analyze organizational and community needs.	$25,000
Bet Tzedek addresses the legal needs of vulnerable people through a continuum of services in elder law, economic justice, housing, immigration relief and transgender rights. In the last 5 years, Bet Tzedek has doubled from a $7M budget with 48 staff members to a $14.7M budget with more than 100 staff. Core departments such as finance have not kept pace with growth. Bet Tzedek will use funds to help it transition to the fully cloud-based version of Blackbaud's Financial Edge (FE) so that it can enhance functionality, including redesigning the FE database to enable collection and monitoring of costs by program (rather than funding source). The grant would support the cost of hiring a consultant.	$50,000
California Advocates for Nursing Home Reform (CANHR) has been dedicated to fighting elder abuse and protecting the rights of California's long-term care consumers, provides training and technical assistance to legal services programs, and offers free consumer counseling regarding long term care options. Five of the agency's computers are so outdated they can no longer be updated with current software, which affects efficiency and security. CANHR plans to shift to hybrid work to offering flexibility and to attract and retain staff. CANHR's Project will upgrade staff computers and improve remote security.	$38,400
California Collaborative for Immigrant Justice (CCIJ) provides detained immigrants with legal services and community-led advocacy. CCIJ legal clinics provide detained individuals with one-on-one consultation with an attorney. Currently, CCIJ staff manually create written, anonymized case summaries after each legal clinic, which are then circulated on their listserv of legal service providers. CCIJ will use funding to incorporate artificial intelligence into the referral-writing process, saving staff attorney time, and making it easier for pro bono attorneys and organizations to identify cases for representation. CCIJ will also use funds to create a user-friendly referral database that pro bono attorneys can search to find cases that match their representation criteria.	$150,000
California Indian Legal Services (CILS) protects and advances Indian rights, and facilitates tribal nation-building. Last year's grant funds helped CILS set up basic LegalServer case management configuration. CILS now seeks customization of its new LegalServer CMS to enhance intake, data capture, client billing, and online	$63,900

signature; and, creation and execution of a CMS training program for staff. This project will result in a complete and customized CMS and desktop manual/reference guide.	
California Rural Legal Assistance Foundation (CRLAF) has deep roots in and institutional ties to the largely rural, Latinx and low-income communities and provides direct services and support to legal service organizations serving these same communities. Last year, at the Commission's suggestion CRLAF received a small grant to assess its tech needs, and this year it seeks funds to integrate and update its data, communications and legal case management systems. Grant funds will support a staff position to facilitate needed technology transitions, which includes the transfer of data from old systems to new software. Creating an in-house role will allow CRLAF to resolve urgent issues, train staff on new software, provide ongoing technological troubleshooting, and guide upper management through its IT development process.	$100,000
Center for Gender and Refugee Studies – California, Inc. (CGRS-CA) advances the fundamental rights of individuals fleeing persecution in their home countries by improving access to quality legal representation here in California. CGRS-CA will create supportive structures in the workplace to facilitate recruitment and retention of individuals from historically underrepresented communities. Staff from such communities can face microaggressions or discrimination from their clients (even from their own communities). This project will create tools to confront intra-community (implicit) bias and related prejudice from colleagues (e.g., coaching/sessions, convenings, toolkit).	$48,000
Center for Immigrant Protection dba The LGBT Asylum Project ("LGBTAP") is dedicated to providing accessible legal representation in immigration court for LGBT asylum seekers fleeing persecution due to their sexual orientation, gender identity and/or HIV status. This grant will add to a grant received from the San Francisco Office of Civic Engagements and Immigration Affairs to allow GBBTAP to also represent asylum clients at the Sacramento Immigration Court.	$75,000
Central California Legal Services, Inc. (CCLS) provides free civil legal assistance to eligible residents in Merced, Tulare, Fresno, Kings, Mariposa and Tuolumne Counties. This project improves client and staff communication through improvement to their technology infrastructure and CMS. The grant includes on-site IT infrastructure improvements to support implementing a Simple Justice "Help Seeker" client portal (reducing staff time managing multiple file types and/or time-consuming paperwork); and internet reliability.	$135,000

Centro Legal de la Raza (Centro Legal) is a legal services agency protecting and advancing the rights of low-income, Immigrant, Black, and Latinx communities through bilingual legal representation, education, and advocacy. The DOJ recently published a Final Rule that, for the first time, formally acknowledges that attorneys may provide limited scope services to asylum seekers representing themselves in Immigration Court. In response, Centro Legal proposes to implement a pro se asylum workshop project, leveraging pro bono attorney services. Centro Legal will support unrepresented asylum seekers to complete and submit their applications and to appear at merits hearings in court.	$122,500
Coalition to Abolish Slavery and Trafficking (CAST) serves survivors of all forms of human trafficking (sex and labor), no matter their ethnicity, nationality, age, gender or any other factor. With funds, CAST will create an Impact Litigation unit, comprised of attorneys and lived experience experts, who will be empowered to file first-of-their-kind lawsuits against agricultural companies in California accused of trafficking violations. CAST will hire a Legal Fellow with lived experience of labor trafficking; conduct KYR trainings for agricultural workers in partnerships with CBOs, provide training and TA CBOs, litigators and other legal professionals, provide virtual trainings on rights and remedies, and work with clients to file civil cases.	$195,000
Contra Costa Senior Legal Services (CCSLS) protects the rights of seniors. It is at a crossroads and desires to think critically about how best to grow the organization for optimum impact and efficiency. Earlier in the year CCSLS completed a Strategic Plan. These funds will allow CCSLS to engage a consultant to help determine their gaps in capacity and how the organization can best deliver on their adopted Strategic Plan. This Organizational Effectiveness Assessment includes staff job reviews and stakeholder engagement.	$32,000
Disability Rights Education & Defense Fund (DREDF) advances the civil and human rights of people with disabilities through legal advocacy, training, education and public policy, including in the areas of health care, government services, housing, accommodations, and education. DREDF notes that as a nonprofit founded in 1979 by idealists, the organization was designed to be relatively flat, assuming its employees' passion for social change would drive performance. Current staff seek a process for participating in setting DREDF's organizational and team goals, and creating a clearly defined and open process for setting and aligning individual goals. Funding will provide the resources to implement DREDF's first formal employee evaluation system, using an online program designed with staff and professional input.	$75,000

Dolores Street Community Services (DSCS) and Pangea Legal Services lead the asylee-led Asylee Legal Empowerment Project (ALEP), a self-representation and empowerment program that develops the leadership of asylees, connects asylees to community resources, and paves the way for asylees to self-advocate. ALEP is run in collaboration with Central Valley partners. Their work includes KYR education, in-person simulations, connections to social workers/psychologists, connection to community, doc prep, one-on-one practice with atty, and optional legal observers at hearings. DSCS requests funds to scale the workshop to achieve 40-60 wins each year, and in the long term to train former workshop participants to lead future asylum trainings for their peers.	$183,000
East Bay Family Defenders (EBFD)'s mission is to keep families together and prevent the unnecessary placement and prolonged stay of children in foster care. They will use grant funds to reach low-income families with unmet legal needs at risk of referral to the juvenile dependency court system, before dependency court involvement. EBFD will develop community trainings, resource materials, and services for at-risk families. After piloting the training sessions and resource materials, they will be translated, disseminated, and made accessible online.	$75,000
Elder Law & Advocacy (EL&A) protects seniors by providing legal advice and advocacy. Since returning to the office post-COVID, EL&A has offered a hybrid work environment, to foster higher productivity and lower burnout. EL&A staff are using desktop computers that are slow, unreliable, and dated. Some individuals are using their personal laptops or computers when they work at home. EL&A will purchase hardware and software to create a productive and efficient work environment.	$135,000
Immigrant Defenders Law Center (ImmDef) is a large nonprofit deportation defense provider in Southern California. They currently have a unit to handle all appeals to the 9th Circuit and to the Board of Immigration Appeals. Their project proposes creation of an immigration appeals CLE accredited curriculum to expand appellate expertise to staff attorneys and pro bono partners; creation of resources, practice advisories, and supplementary training materials; explore development of a replicable model for representation before the BIA and 9th Circuit Court of Appeals in order to increase the capacity of local, state, and national partners to take on appeals, and at the same time create a training path for retention of immigration attorneys.	$50,000
Inner City Law Center (ICLC) fights to ensure housing for low-income tenants, working poor families, veterans, people living with HIV/AIDS, immigrants, and people who are living with disabilities or experiencing homelessness. The Vital Documents Clinic project will strengthen ICLC's current footprint in Skid Row through the creation of a permanent vital document clinic service to unhoused	$164,200

individuals. Finally, it will allow ICLC to develop expertise in this new field, which is emerging nationally.	
Jubilee Immigration Advocates (Jubilee) provides immigration legal services and advocacy in the Bay Area. Its staff, including five attorneys and an accredited DOJ Rep speak Tagalog, Cantonese, Mandarin, Vietnamese and Spanish and provide family-based immigration, relief for survivors of violence and abuse, removal defense and naturalization. As a 7-year-old organization that focuses on services, it has grown in the last three years, and needs to upgrade existing IT services to better support staff in a hybrid work model; and, automate and streamline intake processes. This grant-funded IT infrastructure will enable Jubilee staff to troubleshoot IT related issues.	$30,000
Justice At Last (JAL) provides free legal services and representation to survivors of human trafficking so that they can seek justice on their own terms. JAL has 7 staff attorneys, 1 legal fellow and 5 client advocates doing direct services and are lacking a management team to help develop and create protocols, enhance business practices, and support direct services staff. Project funds will go towards the salary of a Finance Manager.	$75,000
La Raza Centro Legal SF (LRCL) provides trauma informed and culturally competent legal services to the Spanish speaking and wider immigrant and low-income communities in the Bay Area. This DEI Project seeks to remedy a historic lack of investment in training/retention of legal aid attorney managers of color, by investing in the next generation of Latinx/BIPOC, first-generation to college legal aid leaders. LRCL all-Latinx attorney managers will receive targeted coaching, management training, and preparation and support for legal aid management positions of increasing responsibility. The goal is to create a pathway to career advancement from within its Leadership team, to increase agency stability and promote justice.	$50,000
LACBA Counsel for Justice (CFJ) consists of four separate projects providing civil legal services to indigent persons: Immigration project; Domestic Violence Project; Veterans Project; and AIDS Legal Services Project. Each project is operated by a different director. The CFJ seeks funds to hire a Director to move all four projects forward together and intentionally enhance services, strengthen its relationships in the community, and expand its board.	$140,000
Lawyers' Committee for Civil Rights - SF (LCCRSF) works to dismantle systems of oppression and racism. Its grounding in community and direct legal services informs its broader impact litigation and policy advocacy. This grant will fund LCCRSFs' critical build-out of its new Legal Server CMS. Operating without a CMS has been a roadblock for staff who manage hundreds of cases and 1,000+ pro bono attorneys. Its CMS needs are unusually complex, and existing funding was insufficient to cover needed costs, resulting in stalled data migration. Grant funds will enable LCCR to complete the necessary IT upgrades it started.	$143,000

Learning Rights Law Center (LRLC) provides free legal representation to families who as a consequence of disability or discrimination have been denied equal access to education. LRLC seeks funding to incorporate data management software into its TIGER program, which provides know-your-rights trainings on education law, conducts outreach to families of students with disabilities, and hosts guest speakers on the special education system. Currently TIGER staff must manually track parent contact and demographic information, admission statuses, and attendance at recurring and one-time trainings. A CMS will capture all workflows and will drastically improve TIGER's ability to track data, assess participant progress, and grow effectively.	$25,000
Legal Access Alameda (LAA), the pro bono arm of the Alameda County Bar Association, leads the Disaster Legal Assistance Collaborative (DLAC) in California. LAA requests support to help its subgrantee, Inland Counties Legal Services (ICLS), to establish a disaster response unit at their organization. ICLS will hire a staff attorney to set up a hotline system, set up systems for remote and in-person assistance to those impacted by disaster, recruit and train volunteer attorneys and interpreters to help in the event of a disaster, and more. ICLS serves rural San Bernardino and Riverside Counties, which both have a natural disaster risk score of over 60%, including fire and earthquake. With training and technical assistance from Legal Access, ICLS will become disaster-ready, so they are immediately positioned to help clients when disaster hits.	$150,000
Legal Aid at Work (LAAW) protects and expands the rights of low-wage workers, families, and communities through education, representation and advocacy. Funds will be used to transition to a new cloud-based legal document management system known as NetDocuments with the help of a consultant. LAAW's current, server-based legal document management system is antiquated and slow, especially for staff working from home. NetDocuments will allow them to work collaboratively in the Cloud while maintaining a high level of security and version control.	$85,000
Legal Aid Society of San Bernardino (LASSB) provides free civil legal services to low-income residents, irrespective of their legal status, within San Bernardino and Riverside counties. LASSB will develop culturally responsive intake and triage points to address intake inefficiencies. In particular, LASSB will transition from a single telephone intake line to a call center intake and triage license model allowing intake and triage of multiple clients and immediate warm handoff to attorney; buildout its onsite intake infrastructure and expand its online intake via a secure and ADA/Culturally compliant site.	$125,000

Legal Link's mission is to remove legal barriers that prolong poverty by adding critically needed capacity to the legal ecosystem. They partner with CBOs to train and support legal navigators who help communities experiencing poverty to surface unmet legal needs, identify legal issues, and access legal protections. Grant funds will allow the org to expand their services to additional rural counties. Funds will support community partner outreach; tailored Legal First Aid curriculum to meet the unique needs of each community; build out of accompanying tech tools, including a web-based curated referral search tool and resources; trainings to new community partners; and, ongoing support to the new network of trained navigators. They will also collect and analyze impact data in order to replicate their model throughout CA.	$122,000
Legal Services for Children (LSC) provides legal and social work services to indigent youth. LSC started to but couldn't afford to completely migrate their server, so it is operating with a bifurcated system that requires maintaining a desktop computer for each user. The laptops they purchased were defective. LSC will make critical investments in tools needed to provide services in a post-Covid, hybrid work environment that includes migrating the file server to the cloud, purchasing hardware, and upgrading Legal Server to increase security and allow for text messaging. They will provide training on tech changes for staff to facilitate adjustment to the new working model.	$150,000
Los Angeles Center for Law and Justice (LACLJ) exclusively serves survivors of domestic violence, sexual assault, and/or human trafficking. LACLJ has no formal cybersecurity policy/protocols and lacks internal expertise in this area. LACLJ's project will engage a consultant to conduct a cybersecurity audit, recommend strategies to address cybersecurity weaknesses, and draft a cybersecurity policy, and additionally will hire a technology manager or external support to oversee implementation of cybersecurity recommendations and technology-based workflow improvements.	$125,000
Mental Health Advocacy Services (MHAS) has expanded in recent years in response to increased interest around MHAS' core issues: homelessness, mental illness, and the intersection of the two. This growth has put increased pressure on MHAS' outdated administrative infrastructure. MHAS will use grant funds for technology improvements across a range of administrative functions including HR, timekeeping, and bill payment, which are currently being done via time-intensive, manual processes. Implementing new, cloud-based HR, timekeeping, and bill payment platforms will provide greater accuracy, efficiency, and a more positive employee experience.	$50,000

Mobile Pathways' mission is to connect immigrants to advocates and services via trusted mobile technology. Mobile Pathways seeks to grow its Legal Defense Coalition (LDC) so marginalized immigrants can access reliable legal information about their cases through mobile phone technology. Mobile Pathways will provide subgrants to support Coalition members' ability to: inform indigent immigrants about their legal rights via Hola Asistente, a free text-based immigration assistant; and improve My Camino to include call automation technologies that tap into an automated government phone system to ensure no court notification gets missed.	$118,000
The National Center for Youth Law (NCYL) advances justice by defending the rights of young people and improving the systems impacting their lives, and serves as a support center to legal services organizations. Their project will ensure recently released immigrant children receive the services and supports they need. This will be accomplished through purchase and implementation of an organizational document management software that allows external partners, including legal aid co-counsel, to securely collaborate on documents with project partners, with some support for beginning a resource library to support the representation of recently released immigrant children.	$150,000
OneJustice's mission is to strengthen the legal services sector's expertise and capacity to advance justice and equity. OneJustice will create a new six-month training program to assist leaders of immigration legal service organizations to determine how best to deploy their limited resources. Their goal is helping providers maximize impact when deciding where to invest resources (e.g., self-help, limited-scope clinics, full-scope representation), how to prioritize services (e.g., naturalization, affirmative relief, removal defense), and how to allocate resources (e.g., attorneys, law students, social workers, paralegals, volunteers).	$125,000
Open Door Legal (ODL) is pioneering a Case Management System (CMS) built from Salesforce to manage all data for any legal aid organization, and to facilitate referral between collaborating organizations. This grant is to facilitate ODL's efforts begun last year to refine and complete its development of the CMS of Family & Children's Law Center and the Justice and Diversity Center.	$50,000
Public Advocates (PA) is a nonprofit law firm and advocacy organization that challenges the systemic causes of poverty and racial discrimination by strengthening community voices in public policy (education, housing, transportation equity, and climate justice). In partnership with Gente Organizada, PA will design and build a new website to support a grassroots campaign against institutional violence in southern California school district serving low-income monolingual Spanish-speaking children. They will retain website developers, develop bilingual infographics and resources, launch campaign web pages and social media, analyze metrics to evaluate digital tools,	$100,000

launch website, and gather user feedback. This pilot will inform PA's website redesign to facilitate online advocacy.	
Public Interest Law Project (PILP)'s mission is to advance justice for low-income people and communities by building the capacity of QLSPs through impact litigation, trainings, and publications, and by advocating for low-income community groups and individuals. Funding will support a comprehensive strategy for acquisition, ownership, and stewardship of land for the benefit of lower-income communities and communities of color. Through a process that incorporates feedback and input from local legal service agencies and community-based organizations, PILP will develop a landscape scan, needs assessment, and strategy brief identifying legal strategies and action steps to advance systems change on these fundamental issues. They will also create a Review Committee, consisting of land use, civil rights, and fair housing practitioners, to help finalize the strategy brief.	$130,000
Root & Rebound (R&R)'s mission is to restore power and resources to the families and communities most harmed by mass incarceration through legal advocacy, public education, policy reform and litigation—a model rooted in the needs and expertise of people who are directly impacted. Grant funds will allow R&R to build out (its existing but new) Fresno office. With these funds, R&R plans to purchase office equipment and supplies, expand their computer lab, and grow their team to include an Operations Manager and a part-time resource specialist to oversee administration of the office and support programing.	$150,000
San Diego Volunteer Lawyer Program (SDVLP)'s mission is to provide equal access to the justice system by serving as a bridge between indigent and other disadvantaged people in San Diego County and volunteer lawyers and others who donate their time to help them. SDVLP will use funds to develop a variety of training videos to post on its website. This will give volunteers better access and remove the burden of individualized volunteer training from SDVLP staff attorneys. Each module will incorporate concepts of client-centered lawyering, trauma-informed services, anti-racism and cultural humility to ensure that clients receive pro bono services from volunteer attorneys who have a solid understanding of how that client's intersecting identities and experiences may affect the attorney-client relationship and the legal matter(s) at issue.	$75,000
San Luis Obispo Legal Assistance Foundation (SLOLAF) is the only locally-based legal aid organization in SLO county. SLOLAF will use funds to work with Lumina Alliance to provide free legal assistance to indigent survivors of domestic violence or sexual assault within SLO County. SLOLAF requests funds to hire a Staff Attorney, to work alongside one other attorney, in the new Family Law Services program.	$120,000

The Secure Families Collaborative (SFC) serves immigrant families from Sonoma County, a rural-urban home to more than 25,000 undocumented residents. It was founded after a convening by the Sonoma Board of Supervisors to provide an integrated legal and social services safety net for hard-hit immigrant families in the aftermath of the 2017 Tubbs Complex Fires. SFC will use this grant to support six collaborating partners and thereby expand the Collaborative's capacity to help more children and families. Additionally, the collaborative will retain staff to publish a model guide reflecting the collaboration.	$160,000
Senior Citizens Legal Services (dba Senior Legal Services "SLS") provides free legal services to defend the rights of the elderly to quality health care, protection from abuse and exploitation, and to be free of discrimination based on age or disability. With 2021 funds, SLS built a foundation by improving technology, but grossly under-budgeted for critical CRM software transition costs. Grant funds will support new CRM software and accomplish the migration process; and, improve their communication system by integrating its CRM with its PBX to create an automated appointment system.	$40,000
Swords to Plowshares Veterans Rights Organization (Swords)'s mission is to heal the wounds, to restore dignity, hope and self-sufficiency to all veterans in need, and to prevent and end homelessness and poverty among veterans. They recently migrated to Salesforce, but confidentiality and reporting complexities specific to their legal services program resulted in an incomplete integration, and they have not had the resources to resolve this. The Legal Services Data and Evaluation Project will: accomplish better inter-office referral and follow up; streamline intake and scheduling processes; create tickler systems to track and follow-up on staff cases and pro bono assignments; implement client satisfaction surveys by text message, particularly for pro bono attorneys; and customize reporting and dashboards for the Legal Program.	$100,000
The Tahirih Justice Center (Tahirih) provides immigrant survivors of gender-based violence with asylum, humanitarian visas and other lawful protections while also providing immediate access to healthcare, counseling, financial assistance, childcare and other social services. Tahirih seeks technology system improvements to communicate with clients and to facilitate client communication in a safe and secure way. Funding will help staff accomplish some portion of development of tools to text information to clients; purchase tablets to lend to clients to use in person or remotely (while staying home with kids); and/or facilitate pro bono by integrating tools like Docusign.	$100,000
TOTAL GRANT AWARDS	**$4,875,000**

Attachment 1: Grants Committee and Grant Review Subcommittee Members

Grants Committee

Hon. Gail Ruderman Feuer, Associate Justice, California Court of Appeals
Hon. Lucy Armendariz, Judge, Superior Court of Los Angeles
Catherine Blakemore, Consultant
Hon. Lisa R. Jaskol, Judge, Superior Court of Los Angeles
Jack W. Londen, Executive Director, California Access to Justice Commission, Partner, Morrison & Foerster LLP
Claire Solot, Managing Director, The Bigglesworth Family Foundation

Liaisons to the Grants Committee:

Salena Copeland, Executive Director, Legal Aid Association of California
Mary Lavery Flynn, Consultant
Melanie Snider, Supervising Attorney, Judicial Council Center for Families, Children & the Courts

Grant Review Subcommittee 2022

Catherine Blakemore, Chair, Consultant
Maria Blanco, Executive Director, UC California Immigrant Legal Services Center
Nikki Dinh, Co Executive Director, Leadership Learning Community
Janis Hirohama, Equal Rights Director, League of Women Voters of California
Hon. Andi Mudryk, Judge, Superior Court of Sacramento
Crystal Miller O'Brien, Advice and Litigation Counsel
Jane Ribadeneyra, Program Analyst, Technology Initiative Grant Program, LSC
Chris Schneider, Central Valley Immigrant Integration Collaborative
Rachel Williams, Pro Bono Counsel, Morrison Foerster
Lucas Wright, Associate Director, The Bigglesworth Family Foundation

Consultant Staff

Stephanie Choy, Principal, Choy Consulting
Mary Tam, Principal, Nahopena Consulting
Mary Flynn, Consultant

Attachment 2: Scoring Rubric

Innovation and Infrastructure Grants Selection Criteria

This rubric is to provide reviewers with a common frame of reference when scoring the Applications. In addition to individual Application scores, the Selection Committee will consider other factors, such as seeking geographic diversity, in determining which organizations will be tentatively approved for funding. Because circumstances will vary, the rubric is intended to offer guidelines rather than hard rules.

Total Points Available = 40 (34 Points + 6 Priority Points)

1. Organizational Vision, Capacity and Ability to Achieve Project Goals (Questions 12-13)

The extent to which the organization demonstrates the ability to deliver and effectively manage the proposed activities and outcomes. This can include the articulated vision for the project and how it aligns with the organization's mission. Overall considerations include where they are now, their intentions for the future, and their learning and growth capabilities. It is not limited to traditional capacity measures such as organization size, established infrastructure, or board stature, but rather can include important capacities such as strong community connections, established partnerships, and cultural competence.
6 Points Available

5-6 = the organization appears able to achieve the project goals and effectively manage the proposed activities and outcomes. Indicia may include well-articulated connection between the project and the mission, track record of the organization, experience and/or passion of the identified staff, quality of partner support. (Unless there is indicia otherwise, an organization will generally score a 5 or 6 on Organizational, Vision, Capacity and Ability to Achieve Project Goals.)
3-4 = there is some indicia that the organization may have difficulty achieving the project goals and effectively managing the proposed activities and outcomes, for example, where staff is passionate but inexperienced, or the project seems disproportionately complex relative to the organization's size and staff capacity.
1-2 = no clear indicia that the organization has the capacity to complete the identified project goals; poor articulation of connection of project to mission

2. Need for Proposed Services and Populations Served (Questions 14-16)

The "why": The application should explain the stated need to be addressed with these infrastructure and innovation grant funds. Depending on the nature of the project proposed, this may be a description of the population the organization serves and an articulation of the community needs, or it may be a description of organizational needs and the issues the organization will address with these grant funds.

8 Points Available + 2 Priority Points for serving rural communities and 2 Priority Points for serving immigrant communities (12 total, including Priority Points)

7-8 = clear and compelling stated need to be solved (e.g. direct connection to addressing a core function that impacts the organization broadly, or addressing a challenge that deeply affects community needs and will have a wide-spread impact.
5-6 = stated need is identified and is moderately compelling but does not have as widespread an impact
3-4 = stated need is identified but lacks definition or is not compelling and impact is not clearly articulated
1-2 = the need is not clearly stated and it is unclear what problem is being solved and impact is not articulated

Priority Points (when to apply priority points):

- **1-2 Points: The grant services will be focused on rural communities or grant funds will impact the organization's ability to serve rural communities.**
- **1-2 Points: The grant services will be focused on underserved immigrant communities regardless of immigrant status or grant funds will impact the organization's ability to serve underserved immigrant communities.**

3. Strength of Proposed Project to Address Identified Infrastructure and/or Innovation Needs (Questions 14, 15 and 16)

The project should describe the "what" and "how" of the proposed infrastructure and innovation activities. The application should explain how the grantee will address the stated need with proposed activities that have been thoughtfully conceived and well-articulated. Planning components should include an assessment of resources needed, including allocation of appropriate staff, analysis of the skills necessary to achieve deliverables, training, readiness, timeline, potential barriers, and outputs.
8 Points Available + 2 Priority Point for significant partnership (10 total, including 2 Priority Points)

7-8 = clear articulation or other indicia that the proposed project is designed to address the stated need; detailed description of key planning components such as resources needed, implementation, timeline, dependencies, or other key elements like staff training
5-6 = moderate articulation or other indicia that the proposed project is designed to address the stated need; some description of key planning components
3-4 = minimal articulation or other indicia that the proposed project is designed to address the stated need; very little detail on planning components or indicia that plans are not carefully thought out
1-2 = no articulation or other indicia that the proposed project is designed to address the stated need; no planning components

Priority Points
1-2 Points: The proposed grant activities involve significant partnership(s) with community-based nonprofits.

4. Significance of Proposed Outcomes and Impact (Question 20)

Impact: will this project enhance the organization's ability to provide quality legal services beyond the term of the grant? Outcomes may include the number of people served, increased efficiency measures, the nature of the impact and other quantifiable deliverables, or it may be qualitative descriptions of how change will impact service delivery in the future. Relative to the grant amount requested, will the project result in meaningful impact for applicant or identified constituents?
8 Points Available

7-8 = clear articulation or other indicia of how the project will expand the scope and/or effectiveness of legal aid work (for applicants, their partners, or the broader legal aid ecosystem in California); includes metrics or strong qualitative descriptions of the impact of proposed services and how it will create lasting positive change for service populations and/or the applicant organization

5-6 = moderate articulation or other indicia of how the project will expand the scope and/or effectiveness of legal aid work (for applicants, their partners, or the broader legal aid ecosystem in California); some description of impact and how proposed services will create positive change for service populations and/or the applicant organization
3-4 = minimal articulation or other indicia of how the project will expand the scope and/or effectiveness of legal aid work (for applicants, their partners, or the broader legal aid ecosystem in California); lacks clear connection to impact of proposed services on service population and/or the applicant organization
1-2 = no articulation or other indicia of how the project will expand the scope and/or effectiveness of legal aid work (for applicants, their partners, or the broader legal aid ecosystem in California); no evident impact of proposed services for service population and/or the applicant organization

5. Additional Factors (Question 26)

Additional points can be allocated, up to four points total, for each significant additional consideration. Additional factors could include considerations such as replicability, sustainability, long term impact, or contributions to the legal aid infrastructure or learning community as a whole (e.g. mapping of legal services).
4 Points Available

Is the project as described one cohesive project, and does the project's scope and outcomes justify the amount of funds requested? If you response is "no" or "unclear," please explain (drop down Yes, No, Unclear)

Review Score Total: (self-calculates)
Based on your review, do you recommend this grant be funded (in whole or in part)?
(drop down: definite yes, leaning yes, leaning no, neutral)
Comments:

1. **Based on the questions above, and the five LOI rubric scoring criteria, should this grant be funded (in whole or in part)?** (drop down definite yes, leaning yes, leaning no, neutral)