



JUDICIAL COUNCIL OF CALIFORNIA

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REPORT TO THE JUDICIAL COUNCIL

For business meeting on: September 21, 2018

Title

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

Agenda Item Type

Action Required

Effective Date

September 21, 2018

Rules, Forms, Standards, or Statutes Affected

None

Date of Report

September 10, 2018

Recommended by

State Bar Legal Services Trust Fund
Commission
Corey N. Friedman, Cochair
Richard G. Reinis, Cochair

Contact

Bonnie Rose Hough, 415-865-7668
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Executive Summary

The Budget Act of 2018 includes over \$25 million in the Equal Access Fund for distribution to legal services providers and support centers. These monies are distributed primarily in two parts: IOLTA (Interest on Lawyers' Trust Accounts)-formula grants and partnership grants (with a small amount also distributed for administration). The Legal Services Trust Fund Commission of the State Bar recommends approving distribution of \$23,039,970 in IOLTA-formula grants for fiscal year (FY) 2018–19, according to the statutory formula in the state Budget Act, and \$2,575,000 in partnership grants for 2019. It further requests approval of the commission's 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 approve the distribution of \$23,039,970 in IOLTA-formula grants for FY 2018–19 according to the terms of the state Budget Act, and approve the commission's determination that the proposed budget of each individual grant complies with statutory and other guidelines.

In addition, the commission recommends that the council approve the distribution of \$2,575,000 in Equal Access Fund partnership grants to the following legal services agencies for programs conducted jointly with courts to provide legal assistance to self-represented litigants:

- 1. Alameda County Bar Association Volunteer Legal Services**
 - Family Law Day of Court Project.....\$30,000
 - Family Law Status Conference\$65,000
- 2. Bay Area Legal Aid**
 - San Mateo County Consumer Debt Clinic.....\$30,000
- 3. Bet Tzedek Legal Services**
 - Self-Help Elder and Dependent Adult Restraining Order Clinic
(Los Angeles County)\$80,000
- 4. California Rural Legal Assistance, Inc.**
 - San Luis Obispo County Rental Clinic for Self-Represented Litigants\$45,000
- 5. Central California Legal Services, Inc.**
 - Guardianship Project.....\$70,000
 - Tenant/Landlord Housing Law Project (Fresno)\$70,000
- 6. East Bay Community Law Center**
 - Traffic Flash Clinic (Alameda)\$60,000
- 7. Elder Law and Advocacy**
 - Imperial County Unlawful Detainer/Elder Abuse Restraining Order Clinic.....\$68,000
- 8. Family Violence Law Center**
 - Domestic Violence Pro Per Project (Alameda)\$23,000
- 9. Greater Bakersfield Legal Services**
 - Partnership Shriver Grant (Kern).....\$103,000
- 10. Justice and Diversity Center**
 - Family Law Assisted Self-Help/Case Resolution (FLASH/CARE) Project
(San Francisco)\$50,000
 - Shriver-SASH Self-Help Custody (San Francisco)\$80,000
- 11. LACBA Counsel for Justice**
 - Domestic Violence Legal Services Project (Los Angeles)\$90,000
- 12. Legal Aid Foundation of Los Angeles**
 - Long Beach Self-Help Center\$60,000

13. Legal Aid Foundation of Santa Barbara	
Shriver–Guardianship Project (Northern Santa Barbara County)	\$103,000
14. Legal Aid of Marin	
Community Court Expansion	\$80,000
15. Legal Aid Society of Orange County	
Consumer Debt Workshop at Central Justice Center (Orange)	\$47,000
Consumer Debt Workshop at Norwalk Courthouse (Los Angeles)	\$35,000
Unlawful Detainer Workshop a at Central Justice Center (Orange)	\$66,000
Unlawful Detainer Workshop at Norwalk Courthouse (Los Angeles).....	\$60,000
16. Legal Aid Society of San Bernardino	
Caregivers Accessing Justice Guardianship Program.....	\$85,000
17. Legal Aid Society of San Diego, Inc.	
Name/Gender Change Clinic	\$85,000
Unlawful Detainer Clinic Expansion Project.....	\$100,000
18. Legal Assistance for Seniors	
Partnership to Assist Guardianship Litigants.....	\$58,000
19. Legal Services of Northern California	
Mother Lode Pro Per Project (Amador, Calaveras, El Dorado, Placer)	\$85,000
Small Claims, Guardianship & Shriver Housing Self-Help Project (Yolo)	\$82,000
20. Los Angeles Center for Law and Justice	
Family Law Information for Parents.....	\$90,000
21. Neighborhood Legal Services of Los Angeles County	
Chatsworth Self-Help Legal Access Center Project	\$100,000
Pasadena Unlawful Detainer Assistance Project	\$80,000
Shriver LA Self-Help Unlawful Detainer Clinic	\$140,000
22. Public Counsel	
Guardianship Clinic (Los Angeles)	\$45,000
23. Public Law Center	
Orange County Courthouse Guardianship Clinic	\$60,000
24. Riverside Legal Aid	
Small Estates Assistance Program	\$90,000
25. San Diego Volunteer Lawyer Program	
Central Division Restraining Order Clinic	\$100,000

26. Santa Clara University Alexander Law Center

Consumer Debt Clinic.....\$60,000

Total\$2,575,000

See Attachment A, *Equal Access Fund: Distribution of Funding for IOLTA-Formula Grants and Partnership Grants under the Budget Act of 2018*, for the text of the commission’s report and the report’s attachments.

Relevant Previous Council Action

The Judicial Council has approved the proposed distribution for each of the past 18 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.” This year, an additional \$10 million was added to the fund. (Sen. Bill 840; Stats. 2018, ch. 29, pp. 10–14.)

In 2005, the Uniform Civil Fees and Standard Fee Schedule Act was approved by the Legislature and the Governor. That act established a new distribution of \$4.80 per filing fee to the Equal Access Fund. The estimated revenue from filing fees for the fund is \$4 million per year. Those revenues have been collected by the trial courts since January 2007.

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

The Budget Act states that “[t]he Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. . . . The Judicial Council may establish additional reporting or quality control requirements”¹ All recipients of partnership grants are required to conduct an annual evaluation of the effectiveness of the programs and submit their evaluation results to the commission by March 1 of the following year—for this round, 2020.

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

1. ¹ Relevant portions of the Budget Act are in the commission’s report (Attachment A), at Attachment A2, pages 16–20.

administrator. The Chief Justice also appoints three nonvoting judges to the commission—two trial court judges and one appellate justice. The membership roster is in the commission’s report (Attachment A) at Attachment A1, pages 14–15.

There are two grant programs, IOLTA-formula grants and partnership grants. The Budget Act provides that 90 percent of the funds be distributed to legal services agencies according to a statutory formula (the IOLTA-formula grants). The remaining 10 percent of the funds are to be distributed as partnership grants to legal services programs for projects conducted jointly with the courts to provide legal assistance to self-represented litigants. The process for choosing the legal services programs to receive these partnership grants is stated in the commission’s report at pages 4–9.

For the grant period funded by the 2018 Budget Act, the Legal Services Trust Fund Commission has approved a schedule for allocation of the part of the Equal Access Fund grants referred to as IOLTA-Formula Grants to legal services providers according to the formula established under the Business and Professions Code.

The commission’s report on the allocation of the Equal Access Fund shows that the commission has followed the statutory requirements and the additional criteria adopted by the council at its August 1999 meeting. Therefore, it is appropriate for the Judicial Council to approve the distribution of \$23,152,904 in IOLTA-formula grants awarded by the Legal Services Trust Fund Commission to allow distribution to the eligible organizations in October. For the council to approve \$2,640,000 in partnership grants is also appropriate.

Distributing the funds to the commission will allow it to carry out the terms of the Budget Act and will put the monies of the Equal Access Fund into the hands of legal services providers to supply legal assistance to self-represented litigants. IOLTA-formula grants are to be distributed on a calendar-year basis beginning January 1, 2019. The fiscal year for the partnership grants commences January 1, 2019.

Policy implications

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

Comments

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

Alternatives considered

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

Fiscal and Operational Impacts

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

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

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

Attachments

1. Attachment A: *Equal Access Fund: Distribution of Funding for IOLTA-Formula Grants and Partnership Grants under the Budget Act of 2018*



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

DATE: September 4, 2018

TO: The Judicial Council of California

FROM: Andrew Tuft, Acting Program Director II
Doan Nguyen, Program Supervisor
Office of Access & Inclusion

CC: Richard Reinis, Co-Chair
Corey Friedman, 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 2018

EXECUTIVE SUMMARY

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

Each year the Equal Access Fund is distributed in two parts: 1) 90% of the funds are distributed according to the statutory Interest on Lawyers' Trust Accounts ("IOLTA") formula; and, 2) 10% of the funds are distributed as discretionary grants for joint projects between court and legal service programs to make legal assistance available to pro per litigants.

Summary of Current Grant Cycle

Pursuant to the Judicial Council's action last year, the Legal Services Trust Fund Program is currently overseeing the 2018 EAF IOLTA-Formula and Partnership Grants:

- IOLTA-Formula Grants. The \$23,151,182 in IOLTA-Formula Grants allocated for the grant period has funded a wide range of

legal services for low-income Californians. These grant funds were allocated according to a formula set forth in the IOLTA statute (Business & Professions Code §§ 6210 et seq.) and pursuant to established procedures for determining eligibility and administering grants. Two categories of legal services providers are eligible for grants: “Qualified Legal Services Projects” and “Qualified Support Centers.”

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

- Partnership Grants. The \$2,856,479 in Partnership Grants for calendar year 2018 funded 42 projects that enhance the ability of unrepresented litigants to pursue justice in civil courts across California. Only Qualified Legal Services Projects are eligible for Partnership Grants.

In 2018, there is an amount of \$2,539,099 in residual funds. Because the distribution amount is based on an estimate of filing fee revenue, the State Bar will use these reserve funds should there be a shortfall.

Distribution Request to the Council

Annually since the inception of the EAF in 1999, the Commission has presented the Council with recommendations for approval of EAF Grants prior to the start of the following grant year. This report requests the Judicial Council approve both EAF IOLTA-Formula Grants and Partnership Grants for the 2019 calendar year. Under the current grant timeline, Partnership Grants are reviewed first, and EAF IOLTA-Formula Grant budget proposals will be reviewed in October in conjunction with IOLTA budget proposals. At this time, we request the Council approve the distribution of \$25,614,970 in funds pursuant to the 2018 Budget Act, plus residual funds and rounding adjustments, to the specified grants as follows:

IOLTA-Formula Grants. The State Bar requests that the Judicial Council approve the distribution of the portion of EAF funds distributed as IOLTA-Formula Grants in the total amount of \$23,039,970 which includes the Basic Budget Act allocation of \$18,352,800, projected filing fee revenue of \$4,687,110 and \$60 in rounding adjustments. The Commission has identified eligible or provisionally eligible legal services providers and in accordance with the IOLTA statute, calculated the appropriate allocation of funds available for EAF IOLTA-Formula Grants under the Budget Act of 2018. The Commission will review budgets to ascertain grantee compliance with the statute, rules and guidelines, prior to distribution of grant funds.

Partnership Grants. The State Bar also requests that the Judicial Council approve the Commission’s recommendations for Partnership Grants for calendar year 2019 in the total amount of

\$2,575,000, which includes the Basic Budget Act allocation of \$2,039,200, projected filing fee revenue of \$520,790, and \$15,010 from unused 2018 partnership grant funds. These discretionary grants are only available to programs already eligible for IOLTA funding, and are awarded after a careful review and analysis of grant proposals based on established criteria. Partnership Grants will, upon approval, be distributed to projects that have completed documentation as early in 2019 as practicable.

INTRODUCTION – THE BUDGET ACT

The Equal Access Fund, initially established in the Budget Act of 1999 with funding of \$10 million, has been the source of important funding for legal services programs every year since 1999. Originally, a single general fund allocation for the Equal Access Fund was directed to the Council under each Budget Act, to be distributed in grants to legal services providers through the Legal Services Trust Fund Commission. (Attachment A1 is a roster of Commission members as of August 27, 2018.) For those years that some judicial branch funding was augmented by the State Appropriations Limit (SAL), the Equal Access Fund also received that augmentation, growing the Fund to \$10,392,000 until 2016 when the general fund allocation was increased by \$5 million. In 2017, it was increased by an additional \$5 million to \$20,392,000, and it remains at that level in the 2018 Budget Act.

Since 2005, this general fund allocation has been supplemented with revenue from filing fees – i.e., \$4.80 from every first paper civil filing is distributed to the Equal Access Fund. Through these fees, the Equal Access Fund has been supplemented by amounts that have been as high as \$6,746,491, and as low as \$4,235,927. The sum projected to be received this year through filing fee revenue is estimated at \$5,207,900, net of administrative fees of \$241,208.

The State Bar requests a distribution totaling \$ 25,599,900 pursuant to the Budget Act of 2018, which is the sum of: (a) the basic budgetary allocation of \$20,392,000; and, (b) additional funding from the Uniform Civil Fees and Standard Fee Schedule Act, filing fee revenue, projected at \$ 5,207,900.

In addition, an allocation of \$741,208 has been set aside for administrative costs of the Judicial Council and the State Bar, of which \$486,785 is for distribution to the Bar for the administration of these grants.

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

- Ninety percent of the grant funds are to be distributed to IOLTA-eligible legal services providers according to a formula set forth in California’s Interest on Lawyers’ Trust Accounts (“IOLTA”) statute.

Funds available for IOLTA-Formula grants, including rounding adjustments of \$60, equal \$23,039,970.

- Ten percent of the grant funds are set aside for Partnership Grants to IOLTA-eligible legal services providers for “joint projects of court and legal services programs to make legal assistance available to pro per litigants.” Funds available for Partnership Grants, including residual funds from last year of \$15,010, equal \$2,575,000.

(The relevant portions of the Budget Act of 2018 are included in Attachment A2.)

THE LEGAL SERVICES GRANTS PROGRAM

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

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

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

Eligibility and Distribution

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

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

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

In 2014, as part of comprehensive efforts to improve efficiencies, the Trust Fund Program took steps to synchronize its various grant calendars to a single grant year beginning January 1, 2015. In order to shift EAF Grants from its traditional October 1 start date, the transitional EAF Grant spanned five quarters beginning October 1, 2014 and ending December 2015, with the October through December 2015 quarter based on projected funding from the 2015 Budget Act. The 2016 grant was then based on the remaining three quarters of funding from the 2015 Budget Act and one quarter of projected funding from the 2016 Budget Act. This straddling of a grant term over two Budget Acts has continued, and the 2019 EAF Grant will be based on the remaining three quarters of funds from the 2018 Budget Act, and projected funding for October through December 2019 from the 2019 Budget Act. Grant agreement wording provides that grant funding is contingent on the appropriation and availability of funds.

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

The Budget Act requires 90 percent of the Equal Access Fund be

distributed to qualified organizations under the same statutory allocation formula as IOLTA funds, consistent with §§ 6216 through 6223 of the Business and Professions Code ("IOLTA-Formula Grants"). Business and Professions Code section 6216 establishes this formula:

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

The IOLTA statute also addresses the use of funds by recipient organizations. Qualified legal services projects must use grants to provide free civil legal services to indigent persons in the counties for which the funds are allocated. In addition, Legal services projects must make extra efforts to increase services to especially disadvantaged and underserved client groups. Qualified support centers must publicize the availability of their services and demonstrate that they actually provide legal support without charge to qualified legal services projects on a statewide basis. [Business and Professions Code, §§6218, 6220, 6221, 6223] A list of the 2019 grant recipients under the Budget Act of 2018 is Attachment A3.

Partnership Grants. Since its inception in 1999, 10% of the Equal Access Fund has been allocated for a competitive grants program for projects that work with local courts to help provide legal services for self-represented litigants. In 2018, 42 projects throughout California are receiving \$2,856,479 in Partnership Grants, in grant sums ranging from \$21,250 to \$103,000.

Partnership Grants are limited to organizations that have been found eligible by the Commission to receive IOLTA and IOLTA-Formula grants as "Qualified Legal Services Projects" under Business and Professions Code section 6213(b). Recipients are selected to "seed" new projects, and also to maximize the impact of this funding across areas of legal need, population types, and geographical regions. In the 2019 grant cycle, \$ 2,575,000, which includes funds from the Budget Act of 2018 and residuals from prior years, is available for Partnership Grants.

Request for Proposals

The Request for Proposals for Partnership Grant projects for calendar year 2019 were released to legal services organizations and local court personnel in March and were due in May 2018 (A copy of this RFP and a sample application are attached as Attachment A4.) The Partnership

Grants Committee carefully reviewed and discussed Partnership Grant applications and will make recommendations to the full Commission for discussion at its August 17 meeting.

Nonetheless, the Partnership Grant funding recommendations are provided to the Council now. The Council has final responsibility for approving the Commission's recommendations for grant awards at its September 2018 meeting.

Selection Criteria

The Budget Act contains four essential elements for Partnership Grants:

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

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

In 2008, the Partnership Committee of the Trust Fund Commission reviewed and substantially reaffirmed most of the practices and priorities it had developed over the years for allocating Partnership Grant funding. However, the Commission decided to soften the practice of terminating funding after five years, and to consider continuation funding for an additional time where exceptional and compelling circumstances so dictate, particularly in rural areas or in response to disasters. On August 18, 2017, the Commission voted to allow all programs to request funding beyond five years if they have demonstrated success through effective evaluation and are providing a needed service.

This year six projects sought funding beyond the fifth-year funding cycle. Of these, five sought sixth year funding, and one – the Mother Lode Project from Legal Services of Northern California, serving six isolated gold country counties – is seeking eighth year funding. Two of the projects seeking this extended funding were not recommended for funding in 2019: Community Legal Services – East Palo Alto's Mandatory Settlement Conference project (San Mateo County), and Public Law Center's Expanded Domestic Violence Restraining Orders Services Clinic (Orange County). The remainder were recommended for

continuation funding, having demonstrated programmatic strength, community need, and a strong working relationship with their partner courts.

As in past years, we received proposals that span a wide range of substantive, procedural, technological and programmatic solutions. All proposals were required include:

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

Because all recipients of the Partnership Grants are organizations that already receive IOLTA and IOLTA-Formula Grants through the Legal Services Trust Fund Program, they are already subject to requirements for oversight and reporting that are in place, including monitoring visits to each organization every three years. The Commission has been working for the past four years, with the support of Judicial Council staff, to develop evaluation and outcome data for reporting on extended legal services that are provided by grantees. We continue to review how brief services, such as many of the services provided in the Partnership

context, can be better evaluated. As of now, each year, Partnership grantees are required to provide detailed reports on the implementation and performance of all projects, including service numbers, challenges, and any ideas for improvement of services.

Overview of Applications and Proposed Grants

For the \$2,575,000 allocated to Partnership Grants, the Commission initially received 42 applications. The Partnership Grant applications represent broad geographic diversity as well as diversity in substantive areas of law and the nature of services to be provided. After working with some of the grantees and their court partners, 36 of the applications were selected for funding.

All of the recommended grants involve collaboration between at least one legal services program and one court. Some are creative partnerships among multiple legal services programs and courts. Some utilize technology to make services more accessible, and all are primarily located at, or in close proximity to, the courthouse. The Commission is requesting your approval for the following grant awards.¹

PROGRAM	PROJECT	RECOMMENDED PARTNERSHIP GRANT
Alameda County Bar Volunteer Legal Services	Alameda County Family Law Day of Court Program	\$30,000
Alameda County Bar Volunteer Legal Services*	Family Law Status Conference Pilot Project	\$65,000
Bay Area Legal Aid	San Mateo County Consumer Debt Clinic	\$30,000
Bet Tzedek Legal Services	Self-Help Elder and Dependent Adult Restraining Order Clinic	\$80,000
California Rural Legal Assistance, Inc.	San Luis Obispo County Rental Clinic for Self-Represented Litigants	\$45,000
Central California Legal Services	Guardianship Project	\$70,000
Central California Legal Services	Tenant/Landlord Housing Law Project	\$70,000
East Bay Community Law Center	Traffic Flash Clinic	\$60,000
Elder Law & Advocacy	Imperial County Unlawful Detainer/ Elder Abuse Restraining Order Clinic	\$68,000
Family Violence Law Center	Domestic Violence Pro Per Project	\$23,000

* Bolded items are new projects.

Attachment A: Equal Access Fund: Distribution of Funding for IOLTA-Formula Grants and Partnership Grants under the Budget Act of 2018

Greater Bakersfield Legal Assistance	Partnership Shriver Grant	\$103,000
Justice & Diversity Center of the Bar Association of San Francisco	FLASH-CARE	\$50,000
Justice & Diversity Center of the Bar Association of San Francisco	Shriver – SASH Self-Help	\$80,000
LACBA Counsel for Justice*	Domestic Violence Legal Services Project	\$90,000
Legal Aid Foundation of Los Angeles	Long Beach Self-Help Center	\$60,000
Legal Aid Foundation of Santa Barbara	Santa Barbara County Shriver Partnership	\$103,000
Legal Aid of Marin	Community Court Expansion	\$80,000
Legal Aid Society of Orange County	Consumer Debt Workshop at Central Justice Center	\$47,000
Legal Aid Society of Orange County	Consumer Debt Workshop at Norwalk Courthouse	\$35,000
Legal Aid Society of Orange County	Unlawful Detainer Workshop at Norwalk Courthouse	\$60,000
Legal Aid Society of Orange County	Unlawful Detainer Workshop at Orange County Central Justice Center	\$66,000
Legal Aid Society of San Bernardino	Caregivers Accessing Justice	\$85,000
Legal Aid Society of San Diego	Name Change & Gender Change Self-Help Clinic	\$85,000
Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion Project	\$100,000
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	\$58,000
Legal Services of Northern California	Mother Lode Pro Per Project	\$85,000
Legal Services of Northern California*	Small Claims, Guardianship, and Shriver Housing Court Self-Help Project	\$82,000

*Bolted items are new projects.

Los Angeles Center for Law and Justice	Family Law Information for Parents	\$90,000
Neighborhood Legal Services	Chatsworth Self-Help Legal Access Center	\$100,000
Neighborhood Legal Services	Pasadena Unlawful Detainer Assistance Project	\$80,000
Neighborhood Legal Services	Shriver LA Self Help Center	\$140,000
Public Counsel	Guardianship Clinic	\$45,000
Public Law Center	Orange County Courthouse Guardianship Clinic	\$60,000
Riverside Legal Aid	Small Estate Assistance Program	\$90,000
San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	\$100,000
Santa Clara University Alexander Law Center	Consumer Debt Clinic	\$60,000
Total Amount of All Recommended Partnership Grants Awards		\$2,575,000

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

NEXT STEPS: TRUST FUND COMMISSION AND JUDICIAL COUNCIL

Legal Services Trust Fund Commission

Based on the Budget Act, the Commission will provide grantees with tentative IOLTA-Formula Equal Access Fund Grant allocation amounts. Each grant recipient will be required to prepare a detailed line-item budget for its EAF IOLTA-Formula Grant. Those detailed budgets will be

reviewed by Legal Services Trust Fund Program staff, and presented to the Commission for approval at its November 16 meeting. Thereafter, the State Bar will sign a grant agreement with each recipient program. (Attachment A6 is a form version of the grant agreements used for 2018 grants. No major changes have been proposed for this year's agreement.)

The 2018 Budget Act funding for the EAF IOLTA-Formula Grants will cover the period of October 1, 2018, through September 30, 2019, covering the last quarter of the 2018 calendar year grant and the first 3

* Bolded items are new projects.

quarters of the 2019 calendar year grant. The final quarter of the 2019 grant will be funded by a quarter of next year's Budget Act allocation.

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

The Trust Fund Program staff will continue to work closely with Council staff to require appropriate evaluation of grant funding, and reports reflecting how the grants meet the statutory requirements and other guidelines, as well as information needed to assist the Council in budget preparation. The Trust Fund Program staff continue to encourage legal services providers to use evaluative tools to make critical assessments of their work and its impact on the communities they serve. Additionally, staff will continue to assess outcome reports and analyze the economic benefits from legal services as we strive to communicate the importance of including legal aid in the safety net for low-income Californians.

Judicial Council

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

- The distribution of \$23,039,970 in IOLTA-Formula Grants based on \$23,039,910 from the Budget Act of 2018 and \$60 in rounding adjustments, for grants to legal services providers determined by the Commission to be in compliance with statutory and other applicable guidelines, in the amounts identified in Attachment A3. The funds will be released by the Council to the State Bar in four equal disbursements, and will be paid out to the eligible legal services programs quarterly (or as close to quarterly as possible depending on contract timing), for the period October 1, 2018 through September 30, 2019 (covering the last quarter of the 2018 grant year and the first 3 quarters of the 2019 grant year).
- The distribution of \$2,575,000 for Partnership Grants including \$2,559,990 from the Budget Act of 2018 and \$15,010 residual funds, as set forth in detail in Attachment A5.

SUMMARY OF COUNCIL ACTION REQUESTED

In conclusion, the State Bar requests that the Judicial Council approve, at its September 2018 meeting, a distribution of \$25,614,970 to the State Bar pursuant to the Budget Act of 2018, of which \$23,039,970 is allocated

to IOLTA-Formula Grants and \$2,575,000 is allocated to Partnership Grants. There is an amount of \$2,539,099 in residual funds. These funds will be used should there be a revenue shortfall. Council approval is necessary to enable timely distribution of funds for the period beginning October 1, 2018.

Attachment A1: 2017-2018 Roster of the Legal Services Trust Fund Commission

<p>Corey N. Friedman, Co-Chair</p> <p>The Division of Occupational Safety & Health (Cal/OSHA) 455 Golden Gate Avenue, 9th Floor San Francisco, CA 94102</p>	<p>Richard G. Reinis, Co-Chair</p> <p>Thompson Coburn 2029 Century Park East, Suite 1900 Los Angeles, CA 90067</p>
<p>Christian Schreiber, Co-Vice-Chair</p> <p>Olivier Schreiber & Chao LLP 201 Filbert Street, Suite 201 San Francisco, CA 94133</p>	<p>Banafsheh Akhlaghi, Co-Vice-Chair</p> <p>NLSCA 35 Miller Avenue, #113 Mill Valley, CA 94941</p>
<p>Amin Al-Sarraf</p> <p>Glaser Weil, LLP 333 S. Hope Street, Suite 2610 Los Angeles, CA 90071</p>	<p>Fred Bailard</p> <p>Presidio Bank One Montgomery Street, Suite 2300 San Francisco, CA 94104</p>
<p>Kim Bartleson</p> <p>Superior Court of California, County of Humboldt 825 Fifth Street Eureka, CA 95501</p>	<p>Hon. Louise Bayles-Fightmaster</p> <p>Fightmaster Mediation & Private Judging P.O. Box 1960 Windsor, CA 95492</p>
<p>Prof. Herman L. DeBose</p> <p>California State University, Northridge 18111 Nordhoff Street Northridge, CA 91330</p>	<p>Prof. Rebecca Delfino</p> <p>Loyola Law School 919 Albany Street Los Angeles, CA 90015</p>
<p>J. Eric Isken - Retired</p>	<p>Parish Knox</p> <p>Los Angeles City Attorney's Office Land Use Division 200 N. Main Street, CHE, Room 701 Los Angeles, CA 90012</p>

Attachment A1: 2017-2018 Roster of the Legal Services Trust Fund Commission

<p>Prof. James Meeker</p> <p>Department Criminology Law & Society University of California, Irvine 12 Thompson Court Irvine, CA 92617</p>	<p>Robert Planthold</p> <p>California Walks 1904 Franklin Street, #709 Oakland, CA 94612</p>
<p>Susan D. Ryan</p> <p>Superior Court of California, County of Riverside P.O. Box 1547 Riverside, CA 92502</p>	<p>Kim Savage</p> <p>Law Office of Kim Savage 2625 Alcatraz Avenue, Suite 331 Berkeley, CA 94705</p>
<p>Melanie Snider</p> <p>Superior Court of California, County of Butte 1775 Concord Avenue, Office 9 Chico, CA 95928</p>	<p>Paul Staley</p> <p>Center for Community Self-Help 1970 Broadway, Suite 350 Oakland, CA 94612</p>
<p>Hon. John A. Sutro, Jr.</p> <p>P.O. Box 641 Kentfield, CA 94914</p>	<p>Christina S. Vanarelli</p> <p>Christina Vanarelli, Inc., APLC 674 County Square Drive, Suite 304 Ventura, CA 93003</p>
<p><u>ADVISOR</u></p> <p>Hon. Michael J. Convey</p> <p>Superior Court of California, County of Los Angeles Stanley Mosk Courthouse 111 North Hill Street, Department 27, Room 634 Los Angeles, CA 90012</p>	<p><u>ADVISOR</u></p> <p>Hon. William J. Murray, Jr.</p> <p>Associate Justice of the Court of Appeal Third Appellate District 914 Capitol Mall, 4th Floor Sacramento, CA 95814</p>
<p><u>ADVISOR</u></p> <p>Hon. Brad Seligman</p> <p>Superior Court of California, County of Alameda 24405 Amador Street, Department 504 Hayward, CA 94544</p>	

Senate Bill No. 840
CHAPTER 29

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, 2018. Filed with Secretary of State June 27, 2018.]

LEGISLATIVE COUNSEL'S DIGEST

SB 840, Mitchell. Budget Act of 2018.

This bill would make appropriations for the support of state government for the 2018–19 fiscal year.

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

Digest Key

Vote: MAJORITY Appropriation: YES Fiscal Committee: YES Local Program: NO

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

SECTION 1.00.

This act shall be known and may be cited as the “Budget Act of 2018.”

[....]

0250-101-0001—For local assistance, Judicial Branch.....46,603,000

Schedule:

(1) 0150010-Support for Operation of Trial Courts.....	8,551,000
(2) 0150051-Child Support Commissioner Program (AB 1058).....	54,332,000
(3) 0150055-California Collaborative and Drug Court Projects.....	5,748,000
(4) 0150075-Grants—Other.....	18,086,000
(5) 0150083-Equal Access Fund.....	20,392,000
(6) Reimbursements to 0150051-Child Support Commissioner Program (AB 1058).....	-54,332,000
(7) Reimbursements to 0150055-California Collaborative and Drug Court Projects.....	-4,588,000
(8) Reimbursements to 0150075-Grants—Other	-1,586,000

Provisions:

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

may establish additional reporting or quality control requirements consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code.

2. The amount appropriated in Schedule (1) is available for reimbursement of court costs related to the following activities: (a) payment of service of process fees billed to the trial courts pursuant to Chapter 1009 of the Statutes of 2002, (b) payment of the court costs payable under Sections 4750 to 4755, inclusive, and Section 6005 of the Penal Code, and (c) payment of court costs of extraordinary homicide trials.
3. Of the funds appropriated in Schedule (4), \$16,500,000 shall be provided to County Law Libraries to backfill the decline in civil filing fee revenue.

[....]

0250-101-0932-For local assistance, Judicial Branch, payable from the Trial Court Trust Fund....2,534,940,000

Schedule:

(1) 0150010-Support for Operation of Trial Courts.....	2,023,236,000
(2) 0150019-Compensation of Superior Court Judges.....	356,974,000
(3) 0150028-Assigned Judges	28,117,000
(4) 0150037-Court Interpreters.....	104,960,000
(5) 0150067-Court Appointed Special Advocate (CASA) program	2,713,000
(6) 0150071-Model Self-Help Program	957,000
(7) 0150083-Equal Access Fund.....	5,482,000
(8) 0150087-Family Law Information Centers.....	345,000
(9) 0150091-Civil Case Coordination.....	832,000
(10) 0150095-Expenses on Behalf of the Trial Courts.....	11,325,000
(11) Reimbursements to 0150010-Support for Operation of Trial Courts	-1,000

Provisions:

1. Of the funds appropriated in Schedule (1), \$25,300,000 shall be available for support of services for self-represented litigants, and any unexpended funds shall revert to the General Fund.
2. The funds appropriated in Schedule (2) shall be made available for costs of the workers' compensation program for trial court judges.
3. The amount appropriated in Schedule (3) shall be made available for all judicial assignments. Schedule (3) expenditures for necessary support staff shall not exceed the staffing level that is necessary to support the equivalent of three judicial officers sitting on assignments. Prior to utilizing funds appropriated in Schedule (3), trial courts shall maximize the use of judicial officers who may be available due to reductions in court services or court closures.
4. The funds appropriated in Schedule (4) shall be for payments to contractual court interpreters, and certified or registered court interpreters employed by the courts for services provided during court proceedings and other services related to pending court proceedings, including services

provided outside a courtroom, and the following court interpreter coordinators: 1.0 each in counties of the 1st through the 15th classes, 0.5 each in counties of the 16th through the 31st classes, and 0.25 each in counties of the 32nd through the 58th classes. For purposes of this provision, "court interpreter coordinators" may be full- or part-time court employees.

The Judicial Council shall set statewide or regional rates and policies for payment of court interpreters, not to exceed the rate paid to certified interpreters in the federal court system.

The Judicial Council shall adopt appropriate rules and procedures for the administration of these funds. The Judicial Council shall report to the Legislature and the Director of Finance annually regarding expenditures from Schedule (4).

5. Upon order of the Director of Finance, the amount available for expenditure in this item may be augmented by the amount of any additional resources available in the Trial Court Trust Fund, which is in addition to the amount appropriated in this item. Any augmentation shall be approved in joint determination with the Chairperson of the Joint Legislative Budget Committee and 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 committee, or not sooner than whatever lesser time the chairperson of the joint committee, or his or her designee, may determine. When a request to augment this item is submitted to the Director of Finance, a copy of that request shall be delivered to the chairpersons of the committees and appropriate subcommittees that consider the State Budget. Delivery of a copy of that request shall not be deemed to be notification in writing for purposes of this provision.
6. Notwithstanding any other provision of law, upon approval and order of the Director of Finance, the amount appropriated in this item shall be reduced by the amount transferred in Item 0250-115-0932 to provide adequate resources to the Judicial Branch Workers' Compensation Fund to pay workers' compensation claims for judicial branch employees and judges, and administrative costs pursuant to Section 68114.10 of the Government Code.
7. Upon approval by the Administrative Director, the Controller shall transfer up to \$11,274,000 to Item 0250-001-0932 for recovery of costs for administrative services provided to the trial courts by the Judicial Council.
8. In order to improve equal access and the fair administration of justice, the funds appropriated in Schedule (7) are available for distribution by the Judicial Council through the Legal Services Trust Fund Commission in support of the Equal Access Fund Program to qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used for legal services in civil matters for indigent persons. The Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. Upon approval by the Administrative Director, the Controller shall transfer up to 5 percent of the funding appropriated in Schedule (7) to Item 0250-001-0932 for administrative expenses. Ten percent of the funds remaining after administrative costs shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and 90 percent of the funds remaining after administrative costs shall be distributed consistent with Sections 6216 to 6223, inclusive, of the Business and

Professions Code. The Judicial Council may establish additional reporting or quality control requirements consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code.

9. Funds available for expenditure in Schedule (7) may be augmented by order of the Director of Finance by the amount of any additional resources deposited for distribution to the Equal Access Fund Program in accordance with Sections 68085.3 and 68085.4 of the Government Code. Any augmentation under this provision shall be authorized not sooner than 30 days after notification in writing to the chairpersons of the committees in each house of the Legislature that consider appropriations, the chairpersons of the committees and appropriate subcommittees that consider the State Budget, and the Chairperson of the Joint Legislative Budget Committee, or not sooner than whatever lesser time the chairperson of the joint committee, or his or her designee, may determine.
10. Sixteen (16.0) subordinate judicial officer positions are authorized to be converted to judgeships in the 2018–19 fiscal year in the manner and pursuant to the authority described in subparagraph (B) of paragraph (1) of subdivision (c) of Section 69615 of the Government Code, as described in the notice filed by the Judicial Council under subparagraph (B) of paragraph (3) of subdivision (c) of Section 69615 of the Government Code.
11. Notwithstanding any other provision of law, and upon approval of the Director of Finance, the amount available for expenditure in Schedule (1) may be increased by the amount of any additional resources collected for the recovery of costs for court appointed dependency counsel services.
12. Upon approval of the Administrative Director, the Controller shall transfer up to \$556,000 to Item 0250-001-0932 for administrative services provided to the trial courts in support of the court appointed dependency counsel program.
13. Of the amounts appropriated in Schedule (1), \$325,000 shall be allocated by the Judicial Council in order to reimburse the California State Auditor's Office for the costs of trial court audits incurred by the California State Auditor's Office pursuant to Section 19210 of the Public Contract Code.
14. Upon approval of the Administrative Director, the Controller shall transfer up to \$500,000 of the funding appropriated in Schedule (10) of this item to Schedule (1) of Item 0250-001-0932 for administrative services provided by the Judicial Council to implement and administer the Civil Representation Pilot Program.
15. Upon approval of the Administrative Director, the amount available for expenditure in Schedule (10) may be augmented by the amount of resources collected to support the implementation and administration of the Civil Representation Pilot Program.
16. Of the amount appropriated in this item, up to \$540,000 is available to reimburse the Controller for the costs of audits incurred by the Controller pursuant to subdivision (h) of Section 77206 of the Government Code.

Attachment A2: Relevant Portions of the Budget Act of 2018

17. The Judicial Council shall conduct, or contract with a researcher to conduct, a cost-benefit analysis of self-help services and submit a report to the Legislature on its findings by November 30, 2020. This analysis shall assess the costs and benefits of each method by which self-help services are provided and how cost-effectiveness may vary across issue areas. Costs and benefits shall also include the impacts of self-help services on trial court operations.
18. Of the funds appropriated in this item, \$2,920,000 shall be available for expenses associated with two judgeships in Riverside County Superior Court.
19. Of the discretionary \$75,000,000 appropriated in Schedule (1) of this item for allocation according to a methodology determined by the Judicial Council, it is the intent of the Legislature that \$10,000,000 be utilized to increase the level of court reporters in family law cases. Further, it is the intent of the Legislature that the \$10,000,000 not supplant existing trial court expenditures on court reporters in family law cases.

Attachment A3: Comparison of IOLTA and IOLTA-Formula EAF Grants for Calendar Year 2019

* Final Allocation Pending Submission of Final Audit

Organization	EAF Grant Allocations	IOLTA Grant Allocation
Advancing Justice - Asian Law Caucus	\$173,080	\$207,360
Advancing Justice-Los Angeles	\$783,810	\$939,050
Affordable Housing Advocates	\$11,710	\$14,030
Aids Legal Referral Panel	\$24,620	\$29,500
Alameda County Bar Volunteer Legal Services	\$54,690	\$65,510
Alameda County Homeless Action Center	\$101,220	\$121,260
Alliance for Children's Rights	\$389,500	\$466,630
Asian Pacific Islander Legal Outreach	\$91,540	\$109,680
Bay Area Legal Aid	\$396,490	\$475,020
Bet Tzedek Legal Services	\$600,120	\$718,960
California Advocates for Nursing Home Reform	\$157,090	\$188,202
California Indian Legal Services	\$199,350	\$238,810
California Rural Legal Assistance Foundation	\$157,090	\$188,202
California Rural Legal Assistance, Inc.*	\$1,686,810	\$2,020,860
California Women's Law Center	\$157,090	\$188,202
Casa Cornelia Law Center	\$209,940	\$251,510
Center for Gender and Refugee Studies - California	\$157,090	\$188,202
Center for Health Care Rights	\$107,910	\$129,290
Center for Human Rights and Constitutional Law	\$157,090	\$188,202
Central California Legal Services	\$880,350	\$1,054,690
Centro Legal de la Raza	\$170,140	\$203,840
Chapman University Family Protection Clinic	\$36,810	\$44,100
Child Care Law Center	\$157,090	\$188,202
Coalition of California Welfare Rights Organizations	\$157,090	\$188,202
Community Legal*	\$12,330	\$14,770
Community Legal Services in East Palo Alto	\$149,990	\$179,700
Contra Costa Senior Legal Services	\$19,230	\$23,040
Disability Rights California	\$2,173,220	\$2,603,650
Disability Rights Education and Defense Fund	\$157,090	\$188,202
Disability Rights Legal Center	\$153,510	\$183,900
East Bay Community Law Center	\$104,130	\$124,750
Elder Law & Advocacy	\$107,150	\$128,380
Family Legal Assistance at CHOC Children's¹	\$17,340	\$20,770

¹Bolded items are new programs

Attachment A3: Comparison of IOLTA and IOLTA-Formula EAF Grants for Calendar Year 2019

* Final Allocation Pending Submission of Final Audit

Organization	EAF Grant Allocations	IOLTA Grant Allocation
Family Violence Appellate Project	\$157,090	\$188,202
Family Violence Law Center	\$11,840	\$14,190
Greater Bakersfield Legal Assistance	\$424,030	\$508,010
Harriett Buhai Center for Family Law	\$129,670	\$155,360
Housing and Economic Rights Advocates¹	\$54,940	\$65,860
IELLA Legal Aid Project	\$162,570	\$194,770
Immigrant Legal Resource Center	\$157,090	\$188,202
Impact Fund	\$157,090	\$188,202
Inland Counties Legal Services	\$1,168,880	\$1,400,380
Inner City Law Center	\$286,700	\$343,480
Justice & Diversity Center of the Bar Association of SF	\$103,970	\$124,550
Justice in Aging	\$157,090	\$188,202
La Raza Centro Legal	\$40,960	\$49,080
LACBA Counsel for Justice	\$82,580	\$98,930
Law Foundation of Silicon Valley	\$283,850	\$340,070
Lawyers' Committee for Civil Rights	\$106,090	\$127,090
Learning Rights Law Center	\$153,870	\$184,350
Legal Aid at Work	\$350,280	\$419,700
Legal Aid Foundation of Los Angeles	\$839,450	\$1,005,700
Legal Aid Foundation of Santa Barbara	\$82,020	\$98,260
Legal Aid of Marin*	\$36,400	\$43,610
Legal Aid of Sonoma County	\$97,540	\$116,870
Legal Aid Society of Orange County	\$606,330	\$726,420
Legal Aid Society of San Bernardino	\$236,150	\$282,920
Legal Aid Society of San Diego	\$635,540	\$761,400
Legal Aid Society of San Mateo County	\$64,180	\$76,890
Legal Assistance for Seniors	\$30,810	\$36,910
Legal Assistance to the Elderly	\$12,970	\$15,540
Legal Services for Children	\$55,350	\$66,300
Legal Services for Prisoners with Children	\$157,090	\$188,202
Legal Services for Seniors	\$68,460	\$82,020
Legal Services of Northern California	\$936,680	\$1,122,240
Los Angeles Center for Law and Justice	\$105,410	\$126,290

¹Bolded items are new programs

Attachment A3: Comparison of IOLTA and IOLTA-Formula EAF Grants for Calendar Year 2019

* Final Allocation Pending Submission of Final Audit

Organization	EAF Grant Allocations	IOLTA Grant Allocation
McGeorge Community Legal Services	\$57,580	\$68,990
Mental Health Advocacy Services	\$46,430	\$55,630
National Center for Youth Law	\$157,090	\$188,202
National Health Law Program	\$157,090	\$188,202
National Housing Law Project	\$157,090	\$188,202
National Immigration Law Center	\$157,090	\$188,202
Neighborhood Legal Services	\$648,650	\$777,110
New American Legal Clinic	\$48,420	\$58,000
OneJustice	\$157,090	\$188,202
Prison Law Office	\$353,900	\$423,950
Public Advocates Inc.	\$246,990	\$295,850
Public Counsel	\$933,710	\$1,118,630
Public Interest Law Project	\$157,090	\$188,202
Public Law Center	\$463,740	\$555,590
Riverside Legal Aid	\$124,900	\$149,640
San Diego Volunteer Lawyer Program	\$166,070	\$198,960
San Luis Obispo Legal Assistance Foundation	\$25,940	\$31,080
Santa Clara County Asian Law Alliance	\$54,460	\$65,250
Santa Clara University Alexander Law Center	\$38,220	\$45,780
Senior Adults Legal Assistance	\$23,610	\$28,280
Senior Advocacy Network¹	\$35,900	\$43,010
Senior Citizens Legal Services	\$23,310	\$27,930
UC Davis School of Law Legal Clinics	\$126,190	\$151,190
USD School of Law Legal Clinics	\$82,880	\$99,290
Veterans Legal Institute	\$32,080	\$38,430
Voluntary Legal Services Program of Northern California	\$127,690	\$152,970
Wage Justice Center	\$42,340	\$50,720
Watsonville Law Center	\$39,660	\$47,510
Western Center on Law and Poverty	\$157,090	\$188,202
Worksafe, Inc.	\$157,090	\$188,202
Youth Law Center	\$157,090	\$188,202
Yuba-Sutter Legal Center for Seniors	\$18,810	\$22,530
Total	\$23,039,970	\$27,603,014

¹Bolded items are new programs

PARTNERSHIP GRANT REQUEST FOR PROPOSAL REQUIREMENTS

I. BACKGROUND INFORMATION

The State Budget Act allocates funds to the Equal Access Fund *“to improve equal access and the fair administration of justice.”* The Equal Access Fund is given to the Judicial Council to be distributed through the State Bar of California’s Legal Services Trust Fund Program (LSTFP). Ten percent of the funds available for distribution will support Partnership Grants to legal services programs for *“joint projects of courts and legal services programs to make legal assistance available to pro per litigants.”*

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

Partnership Grants are intended to be seed money to support projects that will eventually be funded from other sources of revenue. Applicants must describe plans for obtaining funding from other sources to support these projects. Funding is typically reduced in the third, fourth, and fifth years in which an applicant is approved for a grant. Previously, the Commission did not provide Partnership Grant funding for the same project for more than five years except under extraordinary circumstances, such as in rural areas where the need is particularly high, yet alternative funding is unavailable, or to serve areas hit by disaster. In 2017, the Commission adopted a policy that maintains the intention to provide seed funding over the course of five years, but expands consideration for funding beyond a fifth year. For more information refer to the Partnership Grant 5-Year Funding Policy found in the Partnership Grant application record.

II. ELIGIBILITY REQUIREMENTS FOR PARTNERSHIP GRANTS

There are four basic eligibility requirements for Partnership Grants:

1. Qualified Legal Services Projects (QLSPs). Only QLSPs are eligible to apply for Partnership Grants (Business & Professions Code 6210 et seq.).
2. Joint Court/Legal Services Program Projects. Proposals must be for projects jointly developed and implemented by courts and legal services programs, and, except in rare circumstances, services must be delivered at or near the courthouse.
3. 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).
4. Self-Represented Civil Litigants in State Court. Use of Partnership Grant funds is restricted to providing assistance to individuals who are pursuing matters in state court without representation by counsel. These funds cannot be used to make court appearances on behalf of litigants.

III. SELECTION CRITERIA FOR PARTNERSHIP GRANTS

The Commission has full discretion to recommend grant awards based on its analysis of the need within the communities to be served, the extent to which the proposal addresses all the issues identified in the RFP, and consideration to fund a range of projects that represent diverse geographic areas, substantive issues, and client constituencies. Decisions of the Commission, as approved by the Judicial Council, are final. There is no appeals process.

In its review, the Commission will consider how effectively the proposal addresses the following issues:

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

Grant Year: 2019

Due Date: May 2, 2018 5:00pm PST

Prepared by: Alex Mayor-Test101

Project Title:
 Program Name: **Test BriCo Legal Services234**
 Applicant Title: **test**
 Address: **180 Howard Street 5th Floor**
 City: **San Francisco**

Email: **test@smartsimple.com**
 Contact Phone: **415-538-2252**

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

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

Form A - Project Profile

Open the tabs and complete the fields on forms A through F as concisely and completely as possible. Only questions marked with an asterisk (*) are mandatory to submit the application. However, providing complete answers to all questions will help minimize follow-up and may reduce the proposal's likelihood of being denied.

1. Application Contact:

Job Title:

Email:

Telephone:

County(ies) Served by this
Project

Alameda

3. Total Amount Requested:

Partner Court(s) and Project Location(s)

Partner Court	Name of Location	Address	On-Site Days/Hours	Total Hours/Month
---------------	------------------	---------	--------------------	-------------------

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

Yes

a. Select Project for Refunding

b. Current Project Summary

If applying to fund a continuing project that is currently in operation, please include a brief 150-word summary of the progress made to date in the current year. (This can include highlights, benchmarks, activities, metrics, challenges, etc.).

c. Is this project similar to a previously funded partnership grant project? If so, what is different about the current proposed project?

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

Form B - Project Description

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

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

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

3. Types of Services to be Provided.

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

b. Identify any new resource materials to be developed, the individual(s) who will be responsible for preparing those materials, and how they differ from materials already posted, i.e., at

www.courts.ca.gov , www.lawhelpca.org or www.CAlegaladvocates.org.

c. Describe language capabilities among staff and any plans for developing resource materials in multiple languages. If the service population includes persons who are monolingual in a language staff does not speak, explain how the project will ensure services are available to those persons.

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

e. Provide information about current and planned collaboration on this project with other legal services programs and other types of organizations in the community.

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

4. Goals and Objectives.

1. Total number of workshops provided annually:

2. Total number of individuals served through these workshops annually:

3. Total number of individuals who received one-on-one services annually (not including family members and others impacted):

Services and Resources	Goal	
	# of Workshops/Annually	# of Individuals/Annually
Group-Setting Services		
Information on Substantive Legal Options	0	0
Information on General Court Processes and Procedure	0	0
Document Preparation or Review	0	0
Trial/Hearing Preparation	0	0
Other (describe in Question 4b)	0	0

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

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

b. Describe services identified above as "Other." If any of the other numbers in the chart above require explanation, provide the additional explanatory text here.

c. Identify any anticipated goals for the project not quantified in the chart above.

d. If you will be providing workshops, please describe the format for those workshops. For example, discuss whether you will utilize video conference, or online document assembly. What is the goal of each workshop and how do you hope the customer will benefit?

5. Location.

a. Services must be provided at the courthouse except in rare circumstances. Will services be provided at the courthouse?

Yes

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

No

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

6. Quality Control, including Supervision.

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

b. If the project is designed to utilize volunteers, indicate whether these will be attorneys, paralegals, law students, etc. Describe the work volunteers will undertake and explain how they will be trained and supervised.

c. If the project includes document preparation, how will the project ensure that documents are completed correctly? Will the documents be reviewed by project staff, and if so, who will conduct the review, and when will the review be conducted?

d. If a sub-grant of any Partnership Grant funds is envisioned, provide details for that arrangement, including plans for oversight and evaluation of the services provided by the sub-grantee.

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

8. Attorney-Client Relationship.

a. Do you plan to establish an attorney-client relationship?

No

b. If yes, describe the protocols that will be used to check for conflicts and how individuals will be served in the event a conflict is identified, i.e., referrals to a conflict panel, independent contractor, etc.

c. If no, explain how litigants will be made aware of the scope of services to be provided and how customers will be informed that an attorney-client relationship will not be established.

9. Impartiality of the Court.

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

Yes

b. If yes, which party or side of the matter do you plan to serve?

c. If yes, explain why the project has established this limitation. What steps have been taken to explore all implications of this decision, and address any risk of an appearance of impropriety on the court's part?

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

11. Collaboration and Partnership with the Court.

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

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

12. Timetable. Describe the proposed timetable for implementation of the project by quarter for the grant year. (new projects only)

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

14. Project Continuity.

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

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

c. Are you applying for funding beyond a fifth year?

Yes

1. Court Partnership

a. Provide a summary of feedback from the court commenting on project efficacy, value, and importance. This may come from a survey or other feedback mechanisms. (Suggested maximum word count: 250 words)

b. Provide contact information for at least one court representative who can be interviewed regarding this project.

Court Representative
Name:

Court Representative
Email:

Court Representative
Phone Number:

Additional Court
Representative Contact
Information (*Optional*):

2. Project Status

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

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

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

Form C - Project Budget

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

Account Title	Proposed Partnership Grant	Other Trust Fund Monies	Other Funding (Non-Trust Fund Monies)	Total
---------------	----------------------------	-------------------------	---------------------------------------	-------

Personnel

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

Non-Personnel

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

Project Staff	FTEs - Partnership Grant	FTEs - Other Trust Fund Monies	FTEs - Other Funding	FTEs Total
---------------	--------------------------	--------------------------------	----------------------	------------

1. Lawyers

0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00

Total Lawyers	0.00	0.00	0.00	0.00
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2. Paralegals

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

3. Other Staff

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

Form D - Budget Narrative

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

Personnel

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

Non-Personnel

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

Form E - Project Assurances

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

Upload Signed
Assurances Document:

Form F - Agreement of the Partner Court

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

Upload Letter(s) of
Support:

Upload MOU(s):

Your MOU should

contain:

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

Supporting Documents (Optional)

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

Attachment A5: Highlights of Recommended 2019 Partnership Grant Projects
2019 PARTNERSHIP GRANT RECOMMENDATIONS

PROGRAM LEGAL NAME	PROJECT NAME	COUNTY	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
ALAMEDA COUNTY BAR VOLUNTEER LEGAL SERVICES	Alameda County Family Law Day of Court Program	Alameda	Returning	This project supports litigants on the self-represented litigant Request For Order calendars at the Hayward Hall of Justice Volunteer attorneys, under guidance of the program's Supervising Attorney or a Self-Help Services staff attorney, take referrals directly from the bench to prepare Findings and Order After Hearing. It is a collaborative clinic, where volunteers and clinic staff work very closely with judicial officers and courtroom personnel.	\$30,000
ALAMEDA COUNTY BAR VOLUNTEER LEGAL SERVICES	Family Law Status Conference Pilot Project	Alameda	New	This project will support self-represented litigants who appear on Alameda County Family Law Status Conference (FLSC) calendars at the Hayward Hall of Justice. Self-Help Center and VLSC staff will work with volunteers to assist self-represented litigants with understanding the dissolution process and completing and correcting necessary forms, with the ultimate goal of assisting litigants in moving their cases towards a final resolution.	\$65,000
BAY AREA LEGAL AID	San Mateo County Consumer (Debt) Clinic	San Mateo	Returning	Weekly clinics help consumers avoid illegal, unfair, and fraudulent tactics often employed by debt collectors, using a Know-Your-Rights presentation followed by one-on-one meetings with a staff attorney, supervised law student, or pro bono attorney to assist litigants with preparing and filing answers, settlement negotiations, discovery responses and motions, and responses to dispositive motions.	\$30,000
BET TZEDEK LEGAL SERVICES	Self-Help Elder and Dependent Adult Restraining Order Clinic	Los Angeles	Returning	In 2017 Bet Tzedek expanded its elder abuse services by launching the first Self-Help Elder and Dependent Adult Restraining Order Clinic in Los Angeles County. Now in its second year, the clinic is established as a vital self-help resource for victims; demand for services is higher than anticipated. Core components include: (1) partnering with UCLA Law School to offer clinical placement at the Clinic; (2) collaborating with the court on Guide and File; (3) working with APS social workers to file on behalf of incapacitated victims; (4) exploring remote service options; and (5) assisting pro per litigants	\$80,000
CALIFORNIA RURAL LEGAL ASSISTANCE INC.	San Luis Obispo County Rental Clinic for Self- Represented Litigants	San Luis Obispo	Returning	At the Rental Clinic, the Clinic Attorney reviews the entire eviction process, beginning with the various types of notices, their requirements and exceptions. The unlawful detainer process is explained, including providing examples of the summons, complaint, and answer. Potential affirmative defenses and timelines are discussed in detail, as needed by the clinic patrons. The Clinic Attorney also provides information on security deposits, habitability issues, and tenants' rights against housing discrimination.	\$45,000
CENTRAL CALIFORNIA LEGAL SERVICES	Guardianship Project	Fresno	Returning	The Guardianship Project helps low-income self-represented litigants in Fresno County obtain guardianships for minor children, in conjunction with the Fresno Superior Court Probate Division and Fresno County Public Law Library. Litigants receive detailed guidance in completing required forms, and clinic staff review completed forms for accuracy and thoroughness.	\$70,000
CENTRAL CALIFORNIA LEGAL SERVICES	Tenant/Landlord Housing Law Project	Fresno	Returning	This project provides individualized assistance from project staff and volunteers to both self-represented tenants and landlords, in completing Judicial Council forms. Litigants receive information on tenant/landlord rights and responsibilities; the UD process; and how to prepare for court.	\$70,000

Attachment A5: Highlights of Recommended 2019 Partnership Grant Projects
2019 PARTNERSHIP GRANT RECOMMENDATIONS

PROGRAM LEGAL NAME	PROJECT NAME	COUNTY	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
EAST BAY COMMUNITY LAW CENTER	Traffic Flash Clinic	Alameda	Returning	The East Bay Community Law Center ("EBCLC") will continue to provide pro per assistance to low-income, self-represented litigants through intake clinics, counseling, and Free Legal Assistance Self Help (FLASH) clinics. FLASH clinics deliver quick, on-demand legal services to self-represented litigants in Alameda County Superior Courts, providing self-help information and support for traffic court related legal issues, including clearing records related to court debt, traffic tickets, and driver's license suspensions, which eliminates barriers that interfere with their ability to obtain and maintain basic needs including employment, access to child care, medical care, and education.	\$60,000
ELDER LAW & ADVOCACY	Imperial County Unlawful Detainer/ Elder Abuse Restraining Order Clinic	Imperial	Returning	The Imperial County Unlawful Detainer/Elder Abuse Restraining Order Clinic (ICUD/EA) is a self-help clinic that will continue to provide critical information and assistance to qualifying self-represented litigants in unlawful detainer and elder abuse restraining order matters. The site will continue to be located in the Superior Court located in El Centro and will be operated in partnership with the Court, Elder Law & Advocacy (EL&A) and California Rural Legal Assistance (CRLA). The ICUD/EA clinic will offer both direct assistance and weekly workshops on unlawful detainer or elder abuse restraining order cases.	\$68,000
FAMILY VIOLENCE LAW CENTER	Domestic Violence Pro Per Project	Alameda	Returning	The Domestic Violence Pro Per (DVPP) Project is a collaborative project of Family Violence Law Center (FVLC), 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 provides critical legal assistance to pro per domestic violence litigants in Southern Alameda County at weekly Domestic Violence Petitioner Clinic for DVPA petitioners at the Hayward Hall of Justice and an existing VLSC family law clinic.	\$23,000
GREATER BAKERSFIELD LEGAL ASSISTANCE	Partnership Shriver Grant	Kern	Returning	The Shriver Partnership grant supports the pro per assistance component of GBLA's Sargent Shriver Civil Counsel Act Pilot Project in Kern County California, which includes providing eligible clients with meaningful linkages to an array of supportive social services and resources designed to help move them to greater self-sufficiency, legal information and counsel, review of options for possible early dispute resolution and preparation of responsive pleadings for the tenant in pro per.	\$103,000
JUSTICE & DIVERSITY CENTER OF THE BAR ASSOCIATION OF SAN FRANCISCO	FLASH-CARE	San Francisco	Returning	The Justice & Diversity Center of the Bar Association of San Francisco (JDC) provides legal assistance to indigent Self-Represented Litigants (SRLs) at the San Francisco Superior Unified Family Court (Court) and at the ACCESS (self-help) Center through the Family Law Assisted Self Help/Case Resolution (FLASH-CARE) project. Services will consist of continued legal assistance at two court calendars to move inactive family law cases toward disposition in a timely manner, and to inform SRLs of various procedures leading up to and in preparation for trial. The project also conducts Mandatory Settlement Conference Statement workshops where SRLs are assisted in preparing for their Mandatory Settlement Conferences. The project includes a volunteer component, as well as bi-lingual (Spanish/English) services.	\$50,000
JUSTICE & DIVERSITY CENTER OF THE BAR ASSOCIATION OF SAN FRANCISCO	Shriver – SASH Self- Help	San Francisco	Returning	<p>The Justice & Diversity Center (JDC)'s Sargent Shriver Custody Project (SASH) provides legal information, legal representation, and social services to litigants involved in custody disputes. This Partnership Grant will support legal information services provided to indigent Self-Represented Litigants (SRLs) at the San Francisco Superior Court's ACCESS Center (Legal Self-Help) through the SASH – Self-Help component of JDC's SASH Project.</p> <p>Information and assistance is provided in English and Spanish to low-income SRLs filing paperwork for child custody and visitation matters, as well as facilitates settlement efforts. The customer is then referred for SASH Legal Representation services if the opposing party is represented and one of the litigants is requesting sole physical or legal custody. These direct legal representation services are supported by other funds.</p>	\$80,000

Attachment A5: Highlights of Recommended 2019 Partnership Grant Projects
2019 PARTNERSHIP GRANT RECOMMENDATIONS

PROGRAM LEGAL NAME	PROJECT NAME	COUNTY	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
LACBA COUNSEL FOR JUSTICE	Domestic Violence Legal Service Project	Los Angeles	New	LACBA Counsel for Justice's Domestic Violence Legal Services Project (DVP) partners with the LA Superior Court to provide legal assistance to domestic violence victims. Through the use of new technology, DVP will more effectively and efficiently handle increasing TRO requests. The DVP will install new computer stations for pro per litigants to use with full-time paralegal assistance. These stations will run a program for filling out temporary restraining orders that was created by the Superior Court. Pro per litigants will be able to watch videos instructing them on filing out the forms (created at a 5th grade level) and have the dedicated paralegal, volunteer attorneys, and Project Attorney to assist and answer questions.	\$90,000
LEGAL AID FOUNDATION OF LOS ANGELES	Long Beach Self- Help Center	Los Angeles	Returning	Over the past several years, with support from the Equal Access Partnership Program, LAFLA has developed and implemented a series of family law and unlawful detainer workshops at the Long Beach SHC. Since then, LAFLA has worked to improve and expand workshops and materials based on community needs and feedback. Despite offering an average of over six workshops per week in English, Spanish and Khmer, we frequently have to turn away clients in need due to over-demand. The proposed project would expand our current workshop offerings to include one additional workshop per week to accommodate growing demand in the community.	\$60,000
LEGAL AID FOUNDATION OF SANTA BARBARA	Santa Barbara County Shriver Partnership	Santa Barbara	Returning	In this project, the Probate Facilitator assists pro per litigants who need assistance with guardianships or conservatorships of the person. The Probate Facilitator follows each case through the court process, and if she becomes aware of any issues that arise after hearings, she contacts the litigants and assists them in preparing or amending their paperwork so that problems are expeditiously resolved, limiting further judicial time.	\$103,000
LEGAL AID OF MARIN	Community Court Expansion	Marin	New	The Marin Community Court (MCC) is a collaborative project with representatives of Legal Aid of Marin (LAM), Marin Superior Court and St. Vincent De Paul Society. The goal of the neighborhood-focused court is to assist homeless and/or impoverished Marin County residents to find a way to deal with fines and resulting license suspensions by using combination of community service work and services. The purpose of this request is for funding to "seed" preventive legal services and evaluation of this project for future direction, through: (1) expanding Community Court intakes so Legal Aid of Marin may spot and seeking resolution through appropriate service or referral, underlying legal issues that may have contributed to incurring the infraction in the first instance; and (2) assessing longer-term impact of Community Court participation at the Jail and Saint Vincent de Paul sites through new measures (beyond quantifying infractions and fines cleared), by conducting follow-up interviews with participants who will receive a modest incentive to complete the interviews.	\$80,000

Attachment A5: Highlights of Recommended 2019 Partnership Grant Projects
2019 PARTNERSHIP GRANT RECOMMENDATIONS

PROGRAM LEGAL NAME	PROJECT NAME	COUNTY	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
LEGAL AID SOCIETY OF ORANGE COUNTY	Consumer Debt Workshop at Central Justice Center	Orange	New	Based on its successful model at the Los Angeles Superior Court, the Legal Aid Society of Orange County-Community Legal Services (LASOC-CLS) seeks to partner with the Orange County Superior Court to conduct a Consumer Debt Workshop at the Central Justice Center in Santa Ana. The Workshop is designed to provide information to a range of pro per litigants, from those who are at the earliest stage of a debt collection matter to litigants who have been served with a collection lawsuit. Attendees could include litigants who are subject to actual collection/enforcement activities following entry of a debt collection judgment. The Debt Collection Workshop will educate, inform, and assist self-represented litigants so that the debt collection legal process is accessible and comprehensible to pro per litigants.	\$47,000
LEGAL AID SOCIETY OF ORANGE COUNTY	Consumer Debt Workshop at Norwalk Courthouse	Los Angeles	Returning	The Legal Aid Society of Orange County (LASOC)/ Community Legal Services (CLS) will partner with the Court to conduct the Consumer Debt Workshop. This Workshop will be provided on a weekly basis. This project will increase the community's access to the justice system and will help bridge the gap of unmet needs of low-income individuals and families. It is estimated that half of the litigants in Los Angeles who are sued for collection on a debt will be coming through the Norwalk Courthouse. The Debt Collections Workshop will educate, inform, and assist litigants who have questions about debt collection practices, litigants who have been sued in court on debt collection issues, and litigants who have had a debt collection judgment entered against them. The objective of this program is to make the debt collection legal process more accessible and comprehensible to litigants and to guide them through this process no matter at which stage they seek assistance.	\$35,000
LEGAL AID SOCIETY OF ORANGE COUNTY	Unlawful Detainer Workshop at Norwalk Courthouse	Los Angeles	Returning	The Legal Aid Society of Orange County-Community Legal Services (LASOC-CLS) partners with the Los Angeles County Superior Court to conduct a Consumer Debt Workshop at the Norwalk Courthouse. The Workshop is designed to provide information to a range of pro per litigants, from those who are at the earliest stage of a debt collection matter to litigants who have been served with a collection lawsuit. The Debt Collection Workshop will educate, inform, and assist self-represented litigants who have questions about debt collection practices; litigants who have been sued in court on debt collection issues; and litigants who have had a debt collection judgment entered against them. The objective of this program is to make the debt collection legal process more accessible and comprehensible to pro per litigants and guide them through this process no matter what stage they seek assistance.	\$60,000
LEGAL AID SOCIETY OF ORANGE COUNTY	Unlawful Detainer Workshop at Orange County Central Justice Center	Orange	New	The Legal Aid Society of Orange County-Community Legal Services (LASOC-CLS) seeks to continue to offer its Unlawful Detainer (UD). Slated for the Central Justice Center in Santa Ana, this project seeks to address the large number of litigants who are subject to eviction and unrepresented in Court proceedings. LASOC-CLS will offer the Workshop three times each week to provide timely assistance to pro per litigants seeking to file responses and other pleadings with the court. The Workshops will provide pro per litigants an overview of the eviction process and assistance in completing appropriate forms.	\$66,000

Attachment A5: Highlights of Recommended 2019 Partnership Grant Projects
2019 PARTNERSHIP GRANT RECOMMENDATIONS

PROGRAM LEGAL NAME	PROJECT NAME	COUNTY	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Legal Aid Society of San Bernardino	Caregivers Accessing Justice	San Bernardino	Returning	This project will assist Pro Se litigants on Probate Guardianship and Conservatorship cases through a supportive clinic offered six hours per day, four days per week, within the San Bernardino Justice Center. Services will be available in English and Spanish.	\$85,000
Legal Aid Society of San Diego	Name Change & Gender Change Self- Help Clinic	San Diego	New	In partnership with the San Diego Superior Court, LASSD seeks funding to establish a new project called the Name Change & Gender Change Self-Help Clinic. The aim of the project is to help indigent, self-represented litigants access the legal system when in need of a name and/or gender change by providing facilitator-like one-on-one assistance to participants, including document preparation and information on the court process. In 2017, 1,689 petitions for name/gender change were filed at the San Diego Superior court and only 142 of those petitions were filed with attorneys of record. Providing services to self-represented litigants in this area will not only help and educate the litigant, but will also help the court by cutting down clerk and court time spent on litigants navigating the complicated court process without assistance. In addition, individuals will have nonbinary as a gender option as of September 2018 which will likely increase demand for self-represented assistance in that area.	\$85,000
Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion Project	San Diego	Returning	LASSD seeks funding for a second year of operation of the Unlawful Detainer Expansion Project, which provides services to indigent, self-represented litigants who need assistance in connection with an Unlawful Detainer action at the Hall of Justice, the central division of the San Diego Superior Court. Services include providing daily, walk-in, emergency one-on-one assistance to both plaintiffs and defendants. The goal of is to provide quality, self-help UD services to indigent residents, including those who reside in San Diego's North County, East, South and Central San Diego regions.	\$100,000
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	Alameda	Returning	The Partnership to Assist Guardianship Litigants is a collaborative effort of Legal Assistance for Seniors (LAS), Volunteer Legal Services Corporation of the Alameda County Bar Association (VLSC) 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 new 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 the filing requirements, and will provide day of court assistance twice a month when the pro per cases are calendared.	\$58,000
Legal Services of Northern California	Mother Lode Pro Per Project	Amador, Calaveras, El Dorado, Placer, Nevada, Sierra	Returning	The Mother Lode Pro Per Project (MLPPP) has operated for the past six and a half years with partnership funding. The MLPPP covers 6 rural California counties: Amador, Calaveras, El Dorado, Placer, Nevada, and Sierra. The MLPPP serves a primarily rural area of Northern California where the need for legal services is great due to its geographical isolation and lack of resources. A half time attorney and half time paralegal will provide service in all areas of civil law, including assistance with document preparation, court filings, and small claims. Consumers are seen without appointments at weekly legal clinics throughout the counties.	\$85,000

Attachment A5: Highlights of Recommended 2019 Partnership Grant Projects
2019 PARTNERSHIP GRANT RECOMMENDATIONS

PROGRAM LEGAL NAME	PROJECT NAME	COUNTY	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Legal Services of Northern California	Small Claims, Guardianship, and Shriver Housing Court Self-Help Project	Yolo	New	Legal Services of Northern California's Yolo County office (LSNC) and the Yolo County Superior Court propose to provide free legal assistance to low-income persons in small claims, guardianship, and unlawful detainer cases. The project will address the need for forms assistance and guidance, especially apparent among low-income litigants with language, literacy, or technology barriers in this rural region. This proposal is for a third year of Partnership grant funding for the Small Claims and Guardianship Clinic and the second year for the Housing Court Self-Help Project. Both projects have already made a positive impact on self-represented litigants' access to the Court. The project is unique to the region and fills a gap in services for self-represented litigants.	\$82,000
Los Angeles Center for Law and Justice	Family Law Information for Parents	Los Angeles	Returning	The Family Law Information for Parents Project ("FLIPP" or "Project" – formerly known as the Los Angeles Shriver Partnership Project) located in the Restraining Order Center of the Mosk Courthouse, provides legal information, psychoeducation, and supportive-service referrals to self-represented litigants in custody cases. The Project targets litigants who are ineligible for, refuse services from, or otherwise cannot benefit from LACLJ's state-funded Shriver Custody Project, which provides representation to low-income parents in custody disputes. In addition to accepting walk-ins, the Project will receive referrals from SHRC, FCS, and FL facilitator offices in the Mosk courthouse, as well as other legal service providers in and outside of the courthouse.	\$90,000
Neighborhood Legal Services	Chatsworth Self-Help Legal Access Center	Los Angeles	Returning	This project will help self-represented litigants in family law, unlawful detainer, consumer and other civil matters. For 2019, NLSLA will pilot a project to provide remote services including, but not limited to, e-mail, phone and text message to litigants who are within 125% of the federal poverty level. The purpose of this pilot is to develop best practices and procedures to expand self-help services remotely for a service area as large as LA County.	\$100,000
Neighborhood Legal Services	Pasadena Unlawful Detainer Assistance Project	Los Angeles	Returning	This project provides document preparation and review assistance to self-represented litigants with family and unlawful detainer cases and also with Hague convention service matters.	\$80,000
Neighborhood Legal Services	Shriver LA Self Help Center	Los Angeles	Returning	This project will provide referrals, information, education and assistance with preparation of legal documents to litigants involved in the unlawful detainer process. Landlord or Tenant-oriented workshop sessions will be facilitated by an experienced advocate and include step-by-step instructions on how to complete their legal forms and fee waivers, informational guides on form-filing deadlines and services, as well as trial preparation workshops with materials and/or videos to educate them about the trial process, negotiation techniques, how to present evidence and courtroom etiquette.	\$140,000
Public Counsel	Guardianship Clinic	Los Angeles	Returning	This clinic provides brief counsel, advice, and referrals to pro per litigants who are seeking guardianships or other actions in the probate court, with information about guardianships and other probate issues, subject matter screening, needs assessments, review of pleadings prepared by the litigant, advice on appearing in court; and assistance in completing the applicable forms.	\$45,000

Attachment A5: Highlights of Recommended 2019 Partnership Grant Projects
2019 PARTNERSHIP GRANT RECOMMENDATIONS

PROGRAM LEGAL NAME	PROJECT NAME	COUNTY	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED ALLOCATION
Public Law Center	Orange County Courthouse Guardianship Clinic	Orange	Returning	This clinic helps pro pers with guardianship proceedings through pro bono attorneys. The project focuses on the emerging and critical needs of undocumented persons who seek to protect their minor U.S. citizen or LPR children, with legal information and forms assistance, and "Know Your Rights" presentations and materials for community leaders and members.	\$60,000
Riverside Legal Aid	Small Estate Assistance Program	Riverside	Returning	The pro se self-help clinics assist unrepresented, low-income litigants with probate administration and summary proceedings and answer general questions relating to decedents' estates. Clinic staff help with pleadings, forms, fee waivers, procedural information, family allowances, probate homestead, and family set aside proceedings, among others. The clinics also provide services for drafting and reviewing paperwork to be filed with the courts, and provide monthly public probate accounting workshops..	\$90,000
San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	San Diego	New	This project is a collaboration between San Diego Volunteer Lawyer Program, Inc. (SDVLP) and the San Diego Superior Court to assist domestic violence victims and victims of elder abuse in obtaining legal protection and referrals for counseling, shelter, support, and ongoing legal services as appropriate. The CDROC employs the clinic model of service delivery whereby SDVLP staff and volunteers provide legal advice and assistance to victims in completing a Domestic Violence Restraining Order or an Elder or Dependent Adult Abuse Restraining Order (DVRO) application which they file in pro per.	\$100,000
Santa Clara University Alexander Law Center	Consumer Debt Clinic	Santa Clara	Returning	This project will provide legal services to low-income self-represented debt collection defense litigants, with educational workshops on consumer rights and responsibilities; and legal advice to individuals who require assistance for problems that have already arisen in consumer transactions. The clinic will be directed by an attorney who will supervise law student interns and volunteer attorneys.	\$60,000
Total					\$2,575,000

GRANT AGREEMENT

THE STATE BAR OF CALIFORNIA

LEGAL SERVICES TRUST FUND PROGRAM – IOLTA FORMULA EQUAL ACCESS FUND GRANT

This Grant Agreement is made as of January 1, «GrantYear», (the “Effective Date”) between The State Bar of California (“State Bar”), a California public corporation, and «ProgramLegalName», a California nonprofit corporation (“Recipient”).

RECITALS

Pursuant to California Business and Professions Code Section 6210-6228 (the “Act”), and Title 3, Division 5, Chapter 2 of the Rules of the State Bar of California (the “Rules”), a Legal Services Trust Fund Program (“Program”) has been established in the State of California. The Program administers an Equal Access Fund (“Fund”) that is funded pursuant to the annual California Budget Act (the “Budget Act”) and the Uniform Civil Fees and Standard Fee Schedule Act of 2005 (“Fee Schedule Act”).

Recipient has completed, executed, and submitted to 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 State Bar, Certifications, Assurances, Attachments, and a Proposed Budget (collectively, including the Application for Funding, the “Application Materials”).

In reliance upon the representations and agreements made in the Application Materials, State Bar has determined that Recipient is eligible for an IOLTA-Formula Equal Access Fund grant under the Program and the Fund for the period commencing on January 1, «GrantYear» and ending on December 31, «GrantYear» (“Grant Period”).

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

AGREEMENTS

1. Pursuant to the Act, Rules, and Fund, and in reliance upon the promises and representations made by Recipient, State Bar grants to Recipient «FinalEAFGrantAllocation» (“Grant Amount”).
2. The Act, Budget Act, Fee Schedule Act, Rules, Grant Provisions, Eligibility Guidelines, and Application Materials, including any additions or amendments made to the Application Materials by agreement between the State Bar and Recipient, are incorporated into this Agreement as if set forth in their entirety in this Agreement. Recipient agrees to comply with the Act, Budget Act, Fee Schedule Act, Rules, Grant Provisions, Eligibility Guidelines, 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 State Bar, including without limitation, any Directive adopted after the Effective Date.

3. Recipient acknowledges that the terms of this grant, including Grant Provision Article 4.05, Regulating Rule 3.680(E)(1), and Business and Professions Code Section 6222, require Recipient to submit to State Bar a financial statement that has been audited or reviewed by a certified public accountant within 90 days of the close of Recipient's fiscal year.
4. State Bar will use its best efforts to pay the Grant Amount in accordance with the Grant Provisions. State Bar, however, will in no circumstances bear any liability to Recipient or to other persons or entities for delays in payments.
5. Notwithstanding the Grant Provisions or any other provision of the entire agreement regarding the payment of grants, Recipient acknowledges that the Grant Amount and all payments thereof shall be made from funds received by the State Bar pursuant to the Budget Act and Fee Schedule Act ("State Funding"), and are contingent upon the availability and sufficiency of such funds to the State Bar, as determined by the State Bar. Consequently, Recipient shall not be guaranteed any specific dollar amount in grant funds, or any grant funds at all, if funds received pursuant to State Funding are insufficient or unavailable to the State Bar. This Agreement shall terminate automatically if State Funding becomes unavailable. State Bar shall not assume any liability whatsoever to Recipient for any failure to pay the Grant Amount or any part thereof that results because funds are insufficient or unavailable.
6. Recipient must spend funds received in connection with the Program and Fund in each county served in the amounts set forth in Attachment A – Grant Allocation Detail, which is incorporated herein by reference.
7. Recipient represents and warrants that Recipient's Application Materials for a grant under the Program and Fund do not contain any misstatement of a material fact or omit any material fact necessary to make the statements contained in the Application Materials not misleading. Recipient will notify State Bar promptly of any change in any material fact affecting Recipient's eligibility to receive funds under the Program and Fund, including without limitation, any change that affects the accuracy of any statement made in conjunction with Recipient's application for a grant under the Program and Fund.
8. In support of the State Bar's obligation to the Judicial Council to ensure full participation by Program recipients in maintaining and utilization of statewide on-line resources for legal advocates and consumers of legal services, Recipient will:
 - a) Ensure that, during the grant year, Recipient is accurately identified on the statewide legal services websites, including, as appropriate, in the:
 - i. Client referral directory on LawHelpCalifornia.org;
 - ii. Legal Services Directories (support center and field program directories); and
 - iii. *Pro Bono* Programs Guide on CaliforniaProBono.org.
 - b) Include information about LawHelpCalifornia.org and CALegalAdvocates.org in trainings for new staff advocates, circulate information received from state coordinators about these sites to appropriate staff members, encourage staff to join the

CALegalAdvocate.org site, and must encourage participation in brief trainings about the sites as available.

- c) Provide a link to LawHelpCalifornia.org on their own program websites.
-
- 9. Recipient will permit State Bar's agents to inspect at any time any office or other premises maintained by Recipient or used by Recipient in connection with the expenditure of funds received under the Program. Recipient will cooperate with State Bar's agents during such inspections and will furnish the agents with any information that the agents reasonably request as relevant to determining Recipient's compliance with this Agreement. State Bar's right of access to Recipient's records for purposes of compliance will survive the expiration of the Grant Period. In complying with disclosure requirements of this Agreement and of the Program and Fund, Recipient may withhold any client-identifying information when Recipient reasonably determines that disclosure would violate the Act, the Rules, or a rule or canon of professional responsibility.
 - 10. The Act, Budget Act, Fee Schedule Act, Rules, Grant Provisions, Eligibility Guidelines, and Directives set forth requirements concerning 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 State Bar all rights that Recipient has or will acquire to inspect the premises and records of providers of Subcontracted Services to ensure compliance with Program, provided that disclosure of client-identifying information by a provider of Subcontracted Services shall be governed by the provisions of paragraph 8 hereof.
 - 11. (a) Recipient shall not represent or in any way suggest that it may obligate or pledge the credit of the State of California or of State Bar.
 - (b) Recipient agrees to indemnify, defend, and hold harmless State Bar (including its Board of Trustees, officers, agents, and employees, as the same may be constituted now and from time to time hereafter) from and against any and all liabilities, losses, damages, expenses or costs, whatsoever (including reasonable attorneys' fees, costs, and expenses), which may arise against or be incurred by State Bar as a result of or in connection with (i) claims by any and all contractors, subcontractors, providers of consulting services, materialmen, laborers, or any other person, firm, or corporation retained by Recipient to furnish or supply work, service, materials, or supplies in connection with the performance of this Agreement; and (ii) claims by any person, firm, or corporation for injury or damage by Recipient or Recipient's agents in connection with the provision of legal services pursuant to this Agreement. Recipient shall further protect, indemnify, and hold harmless the State Bar from and against all liabilities, losses, damages, expenses, or costs, whatsoever (including reasonable attorneys' fees, costs, and expenses), arising from or in connection with the State Bar's enforcement of its rights under this paragraph. This indemnity provision shall survive the termination or expiration of this Grant Agreement.
 - (c) Recipient will use reasonable efforts to have State Bar named as an insured party to any liability insurance policies purchased by or for Recipient.

Program Name and Number: «ProgramNumber»

12. This Agreement does not impose on State Bar any obligation to provide Recipient funds in excess of the Grant Amount or beyond the end of the Grant Period.

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

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

Attention: Stephanie L. Choy, Program Manager III
Legal Services Trust Fund Program
Stephanie.choy@calbar.ca.gov

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

Attention: «PrimaryContactName»
«PrimaryContactJobTitle»

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

- (b) This Agreement, together with the Application Materials, Rules, Grant Provisions, Eligibility Guidelines, and Directives, contains and constitutes the entire agreement between State Bar and Recipient regarding the State Bar's grant of Equal Access Fund monies to Recipient and supersedes all prior negotiations, representations, or agreements, either written or oral. This Agreement shall be binding upon agents and successors of both parties. No alteration of the terms of this Agreement will be valid or effective unless in writing and executed by each party.
- (c) This Agreement was made and entered into by the parties in the State of California and shall be construed according to the laws of that state. Any action or suit brought to interpret, construe, or enforce the provisions of this Agreement shall be commenced in the Superior Court of the State of California, in and for the county of San Francisco.
- (d) Each party has full power and authority to enter into and perform this Agreement and the person signing this Agreement on behalf of each party has been properly authorized and empowered to enter into this Agreement. Each party further acknowledges that its Directors, Trustees, or similarly empowered persons have read this Agreement, understand it, and agree to be bound by it.
- (e) No term or provision herein shall be deemed waived and no breach excused unless such waiver or consent is in writing and signed by the party claimed to have waived or consented. No consent or waiver by one party to a breach of this Agreement by the other party, whether expressed or implied, shall constitute a consent to, waiver of, or

Program Name and Number: «ProgramNumber»

excuse for any other, different, or subsequent breach. No amendment, consent, or waiver on behalf of State Bar shall be binding upon State Bar unless it is executed by the Executive Director of The State Bar of California or his/her designee.

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

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

Date:

 THE STATE BAR OF CALIFORNIA

Date:

 RECIPIENT

By:

 Print Name and Title of State Bar
Executive Officer

By:

 Print Name of Executive Director

By:

 Print Name and Title of Board Officer

THE STATE BAR OF CALIFORNIA
LEGAL SERVICES TRUST FUND PROGRAM – IOLTA FORMULA
EQUAL ACCESS FUND 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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GRANT AGREEMENT
THE STATE BAR OF CALIFORNIA
LEGAL SERVICES TRUST FUND PROGRAM - EQUAL ACCESS FUND
PARTNERSHIP GRANT

This Grant Agreement is made as of January 1, «GrantYear» (the “Effective Date”), between The State Bar of California (“State Bar”), a California public corporation, and «ProgramLegalName», a California nonprofit corporation (“Recipient”).

RECITALS

Pursuant to California Business and Professions Code Section 6210-6228 (the “Act”), and Title 3, Division 5, Chapter 2 of the Rules of the State Bar of California (the “Rules”), a Legal Services Trust Fund Program (“Program”) has been established in the State of California. The Program administers an Equal Access Fund (“Fund”) that is funded pursuant to the annual California Budget Act (the “Budget Act”) and the Uniform Civil Fees and Standard Fee Schedule Act of 2005 (“Fee Schedule Act”).

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

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

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

AGREEMENTS

1. Pursuant to requirements of the Program and Fund and in reliance upon the promises and representations made by Recipient, State Bar grants to Recipient «FinalEAFGrantAllocation» (“Grant Amount”) for the «ProjectTitle».
2. The Act, Budget Act, Rules, Grant Provisions, and Proposal Materials, including any additions or amendments made to the Proposal Materials by agreement between the State Bar and Recipient, are incorporated into this Agreement as if set forth in their entirety in this Agreement. Recipient agrees to comply with the Act, Budget Act, Rules, Grant Provisions, Assurances, and other agreements made in the Proposal Materials. Recipient agrees to comply with all lawful statutes, rules, regulations, guidelines, policies, instructions, and 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 State Bar, including without limitation, any Directive adopted after the Effective Date.

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

8. Recipient will permit State Bar's agents to inspect at any time any office or other premises maintained by Recipient or used by Recipient in connection with the expenditure of funds received under the Program. Recipient will cooperate with State Bar's agents during such inspections and will furnish the agents with any information that the agents reasonably request as relevant to determining Recipient's compliance with this Agreement. State Bar's right of access to Recipient's records for purposes of compliance will survive the expiration of the Grant Period. In complying with disclosure requirements of this Agreement and of the Program and Fund, Recipient may withhold any client-identifying information when Recipient reasonably determines that disclosure would violate the Act, the Rules, or a rule or canon of professional responsibility.
9. The Act, Budget Act, Rules, Grant Provisions, and Directives set forth requirements concerning use of Program funds and payment for subcontractors to provide legal services ("Subcontracted Services"). Recipient acknowledges its obligation to inform all providers of Subcontracted Services of the requirements of the Program and to obtain from all Subcontracted Service providers a written agreement to comply with all requirements of this Agreement as if that provider is the Recipient. Recipient assigns to State Bar all rights that Recipient has or will acquire to inspect the premises and records of providers of Subcontracted Services to ensure compliance with Program, provided that disclosure of client-identifying information by a provider of Subcontracted Services shall be governed by the provisions of paragraph 8 hereof.
10. (a) Recipient shall not represent or in any way suggest that it may obligate or pledge the credit of the State of California or of State Bar.

(b) Recipient agrees to indemnify, defend, and hold harmless the State Bar (including its Board of Trustees, officers, agents, and employees, as the same may be constituted now and from time to time hereafter) from and against any and all liabilities, losses, damages, expenses, or costs, whatsoever (including reasonable attorneys' fees, costs, and expenses), which may arise against or be incurred by the State Bar as a result of or in connection with (i) claims by any and all contractors, subcontractors, providers of consulting services, materialmen, laborers, or any other person, firm, or corporation retained by Recipient to furnish or supply work, service, materials, or supplies in connection with the performance of this Agreement; and (ii) claims by any person, firm, or corporation for injury or damage by Recipient or Recipient's agents in connection with the provision of services pursuant to this Agreement. Recipient shall further protect, indemnify, and hold harmless State Bar from and against all liabilities, losses, damages, expenses, or costs, whatsoever (including reasonable attorneys' fees, costs, and expenses), arising from or in connection with State Bar's enforcement of its rights under this paragraph. This indemnity provision shall survive the termination or expiration of this Grant Agreement.

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

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

State Bar: The State Bar of California
180 Howard Street
San Francisco, California 94105-1617

Attention: Stephanie L. Choy, Managing Director
Legal Services Trust Fund Program
Stephanie.choy@calbar.ca.gov

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

Attention: «PrimaryContactName»
«PrimaryContactJobTitle»

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

- (b) This Agreement, together with the Proposal Materials, Rules, Grant Provisions, and Directives, contains and constitutes the entire agreement between State Bar and Recipient regarding the State Bar's grant of a Partnership Grant to Recipient and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement shall be binding upon agents and successors of both parties. No alteration of the terms of this Agreement will be valid or effective unless in writing and executed by each party.
- (c) This Agreement was made and entered into by the parties in the State of California and shall be construed according to the laws of that state. Any action or suit brought to interpret, construe or enforce the provisions of this Agreement shall be commenced in the Superior Court of the State of California, County of San Francisco.
- (d) Each party has full power and authority to enter into and perform this Agreement and the person signing this Agreement on behalf of each party has been properly authorized and empowered to enter into this Agreement. Each party further acknowledges that its Directors, Trustees, or similarly empowered persons have read this Agreement, understand it and agree to be bound by it.
- (e) No term or provision herein shall be deemed waived and no breach excused unless such waiver or consent is in writing and signed by the party claimed to have waived or consented. No consent or waiver by one party to a breach of this Agreement by the other party, whether expressed or implied, shall constitute a consent to, waiver of, or excuse for any other, different, or subsequent breach. No amendment, consent, or waiver on behalf of State Bar shall be binding upon State Bar unless it is executed by the Executive Director of The State Bar of California or his/her designee.

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

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

Date:

THE STATE BAR OF CALIFORNIA

Date:

RECIPIENT

By:

Print Name and Title of State Bar
Executive Officer

By:

Print Name of Executive Director

By:

Print Name and Title of Board Officer