



## JUDICIAL COUNCIL OF CALIFORNIA

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# REPORT TO THE JUDICIAL COUNCIL

*Item No.: 21-098*

For business meeting on May 21, 2021

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**Title**

Equal Access Fund: Distribution of Funds  
from the National Mortgage Settlement Fund  
for Housing Issues

**Agenda Item Type**

Information Only

**Date of Report**

April 23, 2021

**Submitted by**

Legal Services Trust Fund Commission  
Banafsheh Akhlaghi, Cochair  
Eric Iskin, Cochair

**Contact**

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### Executive Summary

Assembly Bill 83 (Stats. 2020, ch. 15, § 1), effective June 29, 2020, amended Government Code section 12531(d) to provide for a one-time \$31 million allocation to the judicial branch from the National Mortgage Settlement Fund to provide legal services in landlord-tenant matters. The statute provides that the Judicial Council allocate these funds to the State Bar, which distributes the funding to eligible legal services agencies. As directed by the Judicial Council at its meeting on September 25, 2020, the State Bar's Legal Services Trust Fund Commission herein reports on the distribution of the funds according to the formula specified in the Budget Act.

### Relevant Previous Council Action

At its meeting on September 25, 2020, the Judicial Council directed staff to distribute National Mortgage Settlement Funds to the State Bar for distribution to legal services agencies that meet the eligibility requirements stated in AB 83 and to report back to the Judicial Council at its May 2021 meeting on the grants made.

### Analysis/Rationale

#### Background

In 2012, California entered a national multistate settlement with the country's five largest loan servicers. This agreement, the National Mortgage Settlement, stemmed from successful

resolution of federal court action (Consent Judgment, United States v. Bank of America (No. 1:12-cv-00361, Banzr. D.C. Apr. 4, 2012)). AB 83, authored by the Committee on Budget and enacted on June 29, 2020, provides for distribution of the funds from the National Mortgage Settlement. Government Code section 12531(e)(1)(A) was amended to provide that \$300 million be administered by the California Housing Finance Agency for housing counseling services and for mortgage assistance to qualified California households. The remainder of the funds are to be distributed as follows:

(B) Thirty-one million dollars (\$31,000,000) to the Judicial Council for distribution through the State Bar to qualified legal services projects and support centers to provide eviction defense or other tenant defense assistance in landlord-tenant disputes, including preeviction and eviction legal services, counseling, advice and consultation, mediation, training, renter education, and representation, and legal services to improve habitability, increase affordable housing, ensure receipt of eligible income or benefits to improve housing stability, and prevent homelessness. These funds shall be allocated as follows:

(i) Seventy-five percent shall be distributed to qualified legal services projects and support centers that currently provide eviction defense or other tenant defense assistance in landlord-tenant disputes as set forth in this subparagraph.

(I) To receive funds, a program shall be eligible for 2020 Interest on Lawyer Trust Fund Account (IOLTA) funding. Each eligible program shall receive a percentage equal to that legal services project's 2020 IOLTA allocation divided by the total 2020 IOLTA allocation for all legal services projects eligible for the funding.

(II) To ensure meaningful funding, a minimum amount of fifty thousand dollars (\$50,000) shall be allocated to an eligible program unless the program requests a lesser amount, in which case any funds that would have otherwise been allocated to the program shall be distributed proportionally to the other qualified legal services projects.

(III) These funds shall be distributed as soon as practicable and shall not supplant existing resources.

(ii) Twenty-five percent shall be allocated through a competitive grant process developed by the Legal Services Trust Fund Commission of the State Bar to award grants to qualified legal service projects and support centers.

(I) The grant process shall ensure that a qualified legal service project or support center to receive funding demonstrate that funds received will be not used to supplant existing resources and will be used to provide services to tenants not otherwise served by that qualified legal service project or support center.

(II) The commission shall determine grant awards, and preference shall be given to qualified legal aid agencies that serve rural or underserved communities which serve clients regardless of immigration or citizenship status.

(III) Any funds not allocated pursuant to this competitive grant process shall be distributed pursuant to clause (i).

(2) No more than 5 percent of the allocations ... shall be spent for the administration of those services.

(Gov. Code, § 12531(e)(1)(B)–(2).)

Based on this language, the Legal Services Trust Fund Commission staff contacted all 2020 IOLTA-funded programs in California. Each of these programs was previously approved as eligible for Equal Access Funds by the Judicial Council at its meeting on September 24, 2019. Programs were surveyed to determine whether they currently adhere to the provisions of Government Code section 12531(e)(1)(B)).

Based on the results of that survey, the formula was applied so that eligible programs were awarded funds in a percentage equal to their 2020 IOLTA allocation divided by the total 2020 IOLTA allocation for all legal services projects and support centers eligible for this funding. (Gov. Code, § 12531(e)(1)(B)(i)(I).)

A minimum grant of \$50,000 was allocated to each eligible program unless the program requested a lesser amount, in which case the additional funds were distributed proportionately to the other qualified legal services projects and support centers. (*Id.*, § 12531(e)(1)(B)(i)(II).)

Programs submitted a budget and plan to the Legal Services Trust Fund Commission for spending the funds in accordance with the statute and documented that they will not use these funds to supplant existing funding.

A separate request for proposals for the 25 percent discretionary funds was issued, and proposals were reviewed in accord with Government Code section 12531(e)(1)(B)(ii)(I) and (II).

The Legal Services Trust Fund Commission approved the final formula allocations and the competitive grants. The programs entered, with the State Bar, into a grant agreement that provides that (1) funds will not supplant existing resources, (2) the program will track these grant funds separately from other grant funds, (3) the program will separately track and report on clients served and main benefits achieved for matters funded with these grants, and (4) the program will report to the State Bar at the conclusion of the grant period. Grants commenced on January 1, 2021.

Distributing the \$31 million in funds to the commission has allowed it to carry out the terms of the Budget Act by distributing the funds as quickly as possible to legal services providers who supply legal assistance to prevent homelessness. This is a one-time allocation of funding, which

follows a similar model as the one-time housing allocation under the Legislature in the Budget Act of 2019.

A report from the State Bar's Legal Service Trust Fund Commission regarding the allocations is attached.

### **Fiscal Impact and Policy implications**

These grants help to implement Goal I of the Judicial Council's Strategic Plan for California's Judicial Branch—Access, Fairness, and Diversity—by increasing representation for low-income persons.

These grants require no court implementation. Council staff will work with the Legal Services Trust Fund Commission to oversee administration of these funds. Staff will also provide support to the commission—including the third of its members appointed by the Chief Justice—to facilitate administration of these funds.

These grants 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 appropriation.

### **Attachments and Links**

1. Attachment A: *Distribution of Funds from the National Mortgage Settlement Fund for Housing Issues, State Bar of California, March 10, 2021*
2. Link A: Assem. Bill 83,  
[https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill\\_id=201920200AB83](https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201920200AB83)
3. Link B: Gov. Code, § 12531,  
[http://leginfo.legislature.ca.gov/faces/codes\\_displaySection.xhtml?sectionNum=12531&lawCode=GOV](http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=12531&lawCode=GOV)



# The State Bar of California

## OFFICE OF ACCESS & INCLUSION

Date: March 10, 2021

To: The Judicial Council of California  
Bonnie Hough, Managing Attorney  
Center for Families, Children & the Courts

From: Doan Nguyen, Program Manager  
Banafsheh Akhlaghi, Co-Chair, Legal Services Trust Fund Commission  
Eric Isken, Co-Chair, Legal Services Trust Fund Commission

Subject: Distribution of Funds from the National Mortgage Settlement Fund for Housing Issues

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### EXECUTIVE SUMMARY

Assembly Bill 83 (Stats. 2020, ch. 15, Sec. 1), effective June 29, 2020, amended Government Code section 12531(d) to provide for a one-time \$31 million allocation to the judicial branch from the National Mortgage Settlement Fund to provide legal services in landlord-tenant matters. The statute provides that the Judicial Council allocate these funds to the State Bar, which distributes the funding to eligible legal services agencies. As directed by the Judicial Council at its September 25, 2020 meeting, the State Bar's Legal Services Trust Fund Commission reports on the distribution of the funds according to the formula specified in the statute.

In order to allow the programs to develop longer term projects and spend the funds efficiently, the Legal Services Trust Fund Commission determined that allocating the funds over a three-year grant period was the best method.

Of the \$31 million appropriated for these services:

- \$22,087,500 (75 percent of the \$31 million appropriation less 5% administrative costs) was earmarked to be distributed via formula to qualified legal services projects and support centers that currently provide eviction defense or other tenant defense assistance in landlord-tenant rental disputes, in a percentage equal to that organization's 2020 IOLTA allocation divided by the total 2020 IOLTA allocation for all organizations eligible for this funding. To ensure sufficient funding was provided to allow for meaningful work, a minimum grant amount of \$50,000 was established.

- \$7,362,500 (25 percent of the \$31 million appropriation less 5% administrative costs) was to be disbursed through a competitive grant process to qualified legal service projects and support centers to provide eviction defense or other tenant defense assistance in landlord-tenant rental disputes. Preference is to be given to agencies that serve rural or underserved communities and that serve clients regardless of immigration or citizenship status. The funds are expressly prohibited from supplanting existing resources.

## **BACKGROUND**

In 2012, California entered a national multistate settlement with the country's five largest loan servicers. This agreement, the National Mortgage Settlement, stemmed from successful resolution of federal court action (Consent Judgment, *United States v. Bank of America* (No. 1:12-cv-00361, Banzr. D.C. Apr. 4, 2012)). AB 83, authored by the Committee on Budget and enacted on June 29, 2020, provides for distribution of the funds from the National Mortgage settlement. Government Code section 12531(e)(1)(A) was amended to provide that \$300 million be administered by the California Housing Finance Agency for housing counseling services and for mortgage assistance to qualified California households. The remainder of the funds are to be distributed as follows:

(B) Thirty-one million dollars (\$31,000,000) to the Judicial Council for distribution through the State Bar to qualified legal services projects and support centers to provide eviction defense or other tenant defense assistance in landlord-tenant disputes, including preeviction and eviction legal services, counseling, advice and consultation, mediation, training, renter education, and representation, and legal services to improve habitability, increase affordable housing, ensure receipt of eligible income or benefits to improve housing stability, and prevent homelessness. These funds shall be allocated as follows:

(i) Seventy-five percent shall be distributed to qualified legal services projects and support centers that currently provide eviction defense or other tenant defense assistance in landlord-tenant disputes as set forth in this subparagraph.

(I) To receive funds, a program shall be eligible for 2020 Interest on Lawyer Trust Fund Account (IOLTA) funding. Each eligible program shall receive a percentage equal to that legal services project's 2020 IOLTA allocation divided by the total 2020 IOLTA allocation for all legal services projects eligible for the funding.

(II) To ensure meaningful funding, a minimum amount of fifty thousand dollars (\$50,000) shall be allocated to an eligible program unless the program requests a lesser amount, in which case any funds that would have otherwise been allocated to the program shall be distributed proportionally to the other qualified legal services projects.

(III) These funds shall be distributed as soon as practicable and shall not supplant existing resources.

(ii) Twenty-five percent shall be allocated through a competitive grant process developed by the Legal Services Trust Fund Commission of the State Bar to award grants to qualified legal service projects and support centers.

(I) The grant process shall ensure that a qualified legal service project or support center to receive funding demonstrate that funds received will be not used to supplant existing resources and will be used to provide services to tenants not otherwise served by that qualified legal service project or support center.

(II) The commission shall determine grant awards, and preference shall be given to qualified legal aid agencies that serve rural or underserved communities which serve clients regardless of immigration or citizenship status.

(III) Any funds not allocated pursuant to this competitive grant process shall be distributed pursuant to clause (i).

(2) No more than 5 percent of the allocations...shall be spent for the administration of those services.

(Gov. Code, § 12531(e)(1)(B)–(2).)

### **Distribution of the \$22,087,500 Formula Tranche**

On August 31, 2020, the Homelessness Prevention (HP) Formula Grant application was released with a due date of September 15. The HP Grants Committee met on October 27 and tentatively approved 71 of the 72 formula applications. Budgets were released to the 71 applicants on October 28 and due back on November 14. The HP Grants Committee met on December 5 and approved all budgets; the LSTFC met on December 15 and approved all projects. A list of projects approved for funding, including distribution amounts, is included in this report as Attachment 1.

### **Distribution of the \$7,362,000 Competitive Grant Tranche**

To ensure continuity in the oversight of the EAF HP funding and program monitoring activities, the Executive Committee of the LSTFC created the EAF Homelessness Prevention (HP) Committee. to make decisions regarding HP funding. The EAF HP Committee met on October 27 to review the formula grant proposals and on December 3<sup>rd</sup> and 15<sup>th</sup> to carefully review the submitted proposals for the competitive grant tranche.

The Request For Proposal (RFP) for this funding tranche was released on September 8, 2020, with a due date of October 9, 2020. The RFP is attached as attachment 3. The State Bar received

39 proposals requesting a total of approximately \$39 million. The HP Grants Committee met on December 3 and tentatively recommended allocation of the \$7,362,500 in funding to 12 organizations. Except for one organization, all recommended allocations were lower than the requested amount. The organizations confirmed with staff that the lower allocations would allow them to proceed with the proposed project and provided revised budgets based on the tentative allocation. The HP Grants Committee and LSTFC met on December 15 and approved the 12 organizations for funding.

The RFP set out specific items for review which are set forth below:

Proposal quality (40 possible points)

Proposals were assessed by the clear identification of the problem/issue and a structured approach on how to address the need. Proposals earning the full score offered creative/innovative approaches, and addressed an unmet or underserved need (e.g. creative partnerships with other organizations, proposed project/services currently don't exist or are not being provided, project would lead to significant systemic change or other large scale progress; and/or proposed project/services is not simply an expansion of services already being provided).

Organizational capacity (30 points)

Organizations earning the full 30 points had capacity or demonstrated ability to scale to launch and manage proposed services. Organization also demonstrated strong historical performance in ability to meet goals from prior grants, timely submission of reports, ability to use grant funds as proposed and in a timely manner. Points were deducted when organizations experience problems in those categories.

Serving rural or underserved communities (10 possible points)

Proposals earning the full 10 points specifically identified their outreach and targeted services to rural and underserved communities in proposed program and provided strong supporting explanations/data. Applicants received partial points if they were able serve these rural and underserved communities but the service was not targeted or detailed in the proposal.

Serving clients regardless of immigration or citizenship status (10 possible points)

Proposals explicitly stating or prioritizing clients would be served regardless of their immigration or citizenship status earned 10 points. Conversely, zero points were assigned if there was no mention of serving or an inability to serve clients regardless of their immigration or citizenship status. Partial points were awarded if applicants could serve clients regardless of immigration or citizenship status but not further detailed.

Evaluations (5 possible points)

Points were based on an applicant's ability to measure and evaluate the benefits and outcomes of the project/activities.

Potential sustainability (5 possible points)



Points were awarded based on interest in and ability to envision how proposed services might continue beyond the grant period and the level of details provided on how sustainability might be achieved beyond simply trying to secure additional funding to continue services. Staff sought specific support and information in the proposal to try and assess the viability of the proposed services extending beyond June 30, 2021.

Once criteria scores were assigned and total scores calculated, staff considered several different funding scenarios incorporating different scoring cut-off levels and different funding ranges with the goal of fully funding high scoring proposals whenever possible and partially funding other projects that had lower overall scores, but not less than 50 points. The funding recommendations approved by the HP Committee during its November 12, 2019 meeting are set forth in attachment 2.

Projects launched January 2021 and the target date for funds disbursement is March 2021 with the grant period to end on June 30, 2024.

### **Evaluation/Reporting**

Grantees will be required to report both quantitative and qualitative data describing the clients served and the work performed with the HP fund grants including specific benefits achieved to demonstrate the impact/value of these additional funds.

- An annual Data Report including the following:
  - All benefits (outcomes achieved for all cases according to the main benefit codes/definitions in the California Legal Aid Reporting Handbook.
  - Demographic data for the clients served.
  - Economic benefits for any main benefit code that resulted in an award recovered for the client or savings for the client.
  - Activities and services provided that are not specific to an individual client, but rather a large group of individuals.
  - Case summary on all cases (attorney-client relationship) and other services (no attorney-client relationship) during the grant period.
- An annual Expenditures report comparing project expenditures to the approved project budget.
- An annual Evaluation Report in which programs will be required to describe the following:
  - The impact the grant had for the community and for the people served.
  - The results of any evaluation performed.
  - A description of immediate and long-term impacts that will result from the project
  - Plans to continue the project after the grant period.
  - If applicable, a report on any impact and advocacy work including:
    - Total number of impact litigation cases
    - Total number of advocacy activities

- Narrative summary for individual cases and activities

Convening

- In the spring of 2021, the State Bar will, convene in collaboration with Judicial Council, the NMSF grantees to ensure coordination and reduce duplication of efforts.

Attachments:

1. Homeless Prevention 2021 Approved Formula Grants
2. Homeless Prevention 2021 RFP Grant Awards
3. National Mortgage Settlement Competitive Grant Request for Proposal

**\$31M National Mortgage Settlement Funding for Homelessness Prevention - Formula Grants**

	Organization	Geographic Scope	Constituency	Description of Services	Legal Services Provider / Support Center	Formula Grant Award
1	Advancing Justice - Asian Law Caucus	San Francisco	Limited English Proficient, low-income, refugee, immigrant, undocumented, disabled, and elderly individuals, particular Asian and Pacific Islanders	AJALC will provide legal representation for tenants facing housing discrimination, landlord harassment, pre-eviction buy-out threats, or other lease violations and establish a process to receive direct referrals from community partner organizations in order to identify potential cases.	LSP	\$ 251,271
2	Affordable Housing Advocates	San Diego	Seniors	AHA will continue with the litigation, started with the EAF Homeless Prevention grant and any appeal which may follow, to keep tenants in place, enforce affordable rent restrictions and monitoring requirements. If the case is resolved before the grant period ends, AHA will use any remaining grant funds to undertake additional enforcement action on behalf of other tenants threatened with displacement due to excessive rent increases or failure to monitor and enforce affordable rent requirements.	LSP	\$ 50,001
3	Aids Legal Referral Panel	Alameda, Contra Costa, Marin, San Francisco, San Mateo, Solano, Sonoma	People with HIV/AIDS	Expand AHAP's current services by hiring a staff attorney for eight months to provide legal services in 50 cases centered on landlord-tenant disputes, including pre-eviction and eviction defense, habitability issues, fair housing and reasonable accommodations, access to affordable housing, and unlawful rent increases. Additionally, the staff attorney will engage in outreach, training, and renter education efforts, which, alongside AHAP's direct representation, will improve housing stability and prevent homelessness for people living with HIV/AIDS in the San Francisco Bay Area.	LSP	\$ 50,001
4	Alliance for Children's Rights	Los Angeles	Child welfare and juvenile justice system-involved transition-age (16-24 year old) individuals	This project will expand targeted legal services and supports to assist those who will soon be aging out of foster care, to prevent homelessness when they no longer qualify for housing assistance and are at risk. ACR will represent current and former foster youth to access and maintain their housing, ensuring they have appropriate benefits and supports in advance of their leaving the foster care system, while advocating in support of their rights to legally-required Transition Planning.	LSP	\$ 413,778
5	Asian Americans Advancing Justice - Los Angeles	Los Angeles, Orange	Limited English Proficient and Asian and Pacific Islanders	The program will cover tenant defense and/or eviction cases in the UD Hub court, servicing high-needs cities and regions not currently covered by other legal assistance providers and/or have insufficient coverage for the entire region. This includes: Pasadena, Chatsworth, Compton, Inglewood, Long Beach, Norwalk, Santa Monica, Van Nuys, Pomona, and Orange County (particularly Garden Grove and Fullerton). The target population will be Asian and Pacific Islanders, and community education workshops and activities will focus on that population in Los Angeles and Orange Counties.	LSP	\$ 865,542
6	Asian Pacific Islander Legal Outreach	Alameda, Contra Costa, San Francisco, San Joaquin, San Mateo, Solano	Indigent, elderly, survivors of domestic violence, and individuals with disabilities, particularly those that are low-income and limited in English proficiency from Asian Pacific Islander or Latinx immigrant communities	This Project will provide eviction defense and other tenant defense assistance in landlord-tenant rental disputes, ranging from limited services to full scope to extended legal representation depending on the needs of each client and will be provided in a culturally and linguistically appropriate manner.	LSP	\$ 161,061
7	Bay Area Legal Aid	Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara	Low-income tenants	BayLegal will increase its capacity to promote housing stability and prevent homelessness by adding a new advocate to its regional Legal Advice Line (LAL) to better meet the volume of calls to LAL now regularly receives. LAL advocates offer homeless prevention services, including legal advice/counsel and pro per assistance that empower clients to advocate on their own behalf when faced with pre-eviction notices, unlawful detainer claims, housing subsidy termination, and housing habitability, accessibility, and discrimination issues. To ensure that low-income tenants can get approved for housing and stay current on their rent, LAL also offers help with economic justice issues, including denial or termination of safety-net benefits, benefits overpayment claims, and credit reporting or other consumer protections. For clients with more complex legal problems, and those who have limited ability for self-advocacy, LAL staff schedule them for appointments with attorneys based in BayLegal offices in the client's home county, who possess expertise in housing and/or economic justice.	LSP	\$ 394,764
8	Bet Tzedek Legal Services	Los Angeles	Low income tenants in West Los Angeles (SPA 5)	Bet Tzedek will hire additional staff to increase its capacity to implement a direct Preventing and Ending Homelessness (PEHP) intake hotline with a response time of 1 business day, train non-PEHP staff to make referrals, and update and modify the housing questionnaire to reflect current housing circumstances. Bet Tzedek will also provide legal assistance to at least 300 households annually, and limited and brief services to more than 200 tenants. It will additionally represent 75 tenants in unlawful detainer cases through full representation.	LSP	\$ 664,506
9	California Advocates for Nursing Home Reform	Statewide	Low-income older adults and persons with disabilities at risk of eviction from California long-term care facilities.	CANHR will expand its existing services by providing up-to-date legal guidance on long-term care evictions in light of COVID-19. CANHR will work with state regulatory agencies to ensure that during the pandemic, resident eviction protections are enforced aggressively, and that facilities are consistently held accountable for eviction violations. Additionally, CANHR will expand its current work by developing partnerships with rural legal service providers (QLSPs), such as Inland County Legal Services and California Rural Legal Assistance, to provide comprehensive eviction defense services for rural long-term care residents. CANHR will offer trainings to legal services staff that address needs specific to rural communities, including access to Home and Community-Based Services. CANHR will partner with QLSPs in rural counties to provide co-counsel and technical assistance in defending residents in discharge hearings and appeals, as well as unlawful detainer actions. Finally, CANHR will create translations of its consumer "Know Your Rights" materials into Spanish, and partner with rural QLSPs to engage in outreach and dissemination of translated materials.	SC	\$ 172,545
10	California Indian Legal Services	Alpine, Inyo, Mono	Low income tenants	CILS, will implement the Housing Eviction & Legal Protection (HELP) to provide landlord-tenant community education to include local non-legal housing assistance providers Inyo Mono Advocates for Community Action (IMACA) and the Mammoth Lakes Housing, Inc., so that they may share information about new legal protections to the tenants in their client communities. The HELP project will also assist tenants seeking housing choice vouchers from the Housing Authority to elicit quicker and better outcomes for tenants on the eastside of the Sierra Nevada.	LSP	\$ 198,039

**\$31M National Mortgage Settlement Funding for Homelessness Prevention - Formula Grants**

	Organization	Geographic Scope	Constituency	Description of Services	Legal Services Provider / Support Center	Formula Grant Award
11	California Rural Legal Assistance Foundation	Fresno, Madera, Sacramento, Solano, Sutter, Tulare, Yolo	Low income rural undocumented workers	CRLAF will strengthen and broaden our existing legal services through a robust remote legal aid housing project aimed at essential low-wage workers and their families, in the Sacramento and Fresno regions. Specifically, it will engage in casework that results in systemic improvements in areas where we can have the greatest impact, including labor camp housing, rural apartment complexes, and mobile home parks. The Project will use video conferencing and document automation software to connect with clients both in remote rural areas and cities, or different areas simultaneously. CRLAF will conduct virtual interviews, long-distance housing clinics, know-your-rights presentations, distribute housing defense packets and give housing rights presentations for unrepresented individuals.	SC	\$ 172,545
12	California Rural Legal Assistance, Inc.	San Joaquin, San Luis Obispo, Santa Barbara, Stanislaus, Ventura	Low income rural, including farmworkers, seniors, LGBTQ+ individuals, Indigenous residents, and people with disabilities	CRLA increase the capacity of its housing legal advice line ("helpline") by hiring a managing attorney to oversee the work as a whole, help to expand the services to cover more of the 20+ counties that CRLA serves statewide, and to better evaluate helpline services and impact on housing stability.	LSP	\$ 1,672,323
13	California Women's Law Center	Los Angeles	Low-income residents in Los Angeles	CWLC will continue to provide legal assistance to Los Angeles County residents facing eviction through online legal housing clinics staffed with volunteer expert housing attorneys. In addition, CWLC will work with local attorneys and advocates to identify and engage in targeted impact work prioritizing work that will benefit the communities it serves.	SC	\$ 172,545
14	Central California Legal Services	Fresno, Kings	Rural communities and residents of color	CCLS will expand its pilot project which focuses whole-person services on housing-insecure students and their families in Fresno County to eligible tenants in rural Kings County and possibly Tulare County. CCLS will deliver eviction defense legal assistance and representation, community legal education, and robust internal and external referrals to wraparound services. CCLS navigators ensure our other substantive teams address any other problem with which CCLS can assist. Navigators further reinforce a family's housing stability via referrals to multiple community-based programs already serving the target population. Our "legal wellness screenings" outreach, community education, and internal and external referral practices, help to address the dynamic revealed in the Justice Gap Report: many individuals are unaware their problem is a legal problem, and do not timely seek help from legal aid.	LSP	\$ 995,397
15	Centro Legal de la Raza	Alameda	Low income tenants	Centro Legal will expand capacity to assist tenants with answers/demurrers to unlawful detainers, in pro per, to prevent default judgments by conducting virtual workshops where tenants are shown how to prepare and file an answer in pro per, creation of a hotline, and an interactive website that will walk tenants through the eviction process through a series of instructional and educational video content. Centro Legal will also select cases for full scope representation that will have maximum impact	LSP	\$ 248,952
16	Child Care Law Center	Statewide	QLSPs, Home-based child care providers	CCLC will produce and disseminate a short, animated video each year about rights as a family child care provider in rental home, rights to child care income benefits as a parent, and rights to operate your family child care home under California zoning laws. By learning about their rights and how to exercise them from these videos, family child care providers and parents will improve their housing stability and will be less vulnerable to experiencing homelessness. The videos will be addressed to a diverse audience including landlords, tenants, government agencies, social services agencies, homeowners, and others.	SC	\$ 172,545
17	Coalition of California Welfare Rights Organizations	Statewide	QLSPs specifically in rural areas and neighborhoods of color	CCWRO will expand its scope of services to all Californians who are housing insecure by providing technical, research and representation to QLSPs serving clients with tenant landlord issues that can be resolved by securing public benefits for the clients of the IOLTA QLSPs. Specifically, CCWRO will provide, (1) technical assistance, representation, co-counseling to IOLTA QLSPs and their clients, (2) trainings for legal aid attorneys and staff, (3) know-your-rights and other presentations for persons experiencing homelessness or at risk of eviction through tenants' rights organizations and homeless service centers, (4) regular newsletters, blog posts, and action items concerning policy changes that affect low-income tenants, (5) direct representation and litigation on behalf of individuals or classes to administrative agencies regarding public benefit issues that impact landlord-tenant disputes, and (6) assisting tenant defense by making a bank of safety net programs available to avoid landlord-tenant disputes that result in evictions	SC	\$ 172,545
18	Community Legal Aid SoCal	Los Angeles, Orange	Low income tenants	CLA SoCal, utilizing pro bono attorneys, will provide a full range of legal services to approximately 5,700 individuals facing eviction and other housing issues to preserve or obtain housing and obtain or preserve benefits that will help them remain housed or obtain housing. CLA SoCal will also provide twelve online Know-Your-Rights housing workshops annually and utilize its social media to share information and publicize its services. Additionally, CLA SoCal will integrate basic case management into the homelessness prevention program to help clients facing housing instability.	LSP	\$ 707,100
19	Community Legal Services in East Palo Alto	San Mateo, Santa Clara	Low income tenants	CLSEPA will expand services to provide legal advice and representation to tenants impacted by the COVID-19 crisis to ensure compliance with new legal protections from AB3088 and other legislation designed to prevent large scale displacement of working families from our community as well as the new California Tenant Protection Act. CLSEPA will also design and implement clinics for tenants who are sued in small claims court for the recovery of small claims rent debt to ensure landlord compliance and help tenants assert any claims they have to protect their credit and financial resources in order to preserve their housing stability. Additionally, CLSEPA will provide legal services to tenants facing eviction for COVID-19 related rent debt both before unlawful detainer cases are filed and throughout the unlawful detainer process. Finally, CLSEPA will design and implement trainings regarding these new legal protections for pro bono attorneys to expand capacity to assist tenants impacted by the COVID-19 crisis.	LSP	\$ 173,913

**\$31M National Mortgage Settlement Funding for Homelessness Prevention - Formula Grants**

	Organization	Geographic Scope	Constituency	Description of Services	Legal Services Provider / Support Center	Formula Grant Award
20	Contra Costa Senior Legal Services	Contra Costa	Low income seniors (60+)	CCSLC will expand its eviction defense, preservation of housing, and homelessness prevention services to those aged 60 and over who are "homeless" or at imminent risk of homelessness. Additionally, CCSLC will educate seniors on common pitfalls that lead to eviction or home loss either through the dissemination of legal materials both hard copy and digital or by giving four presentations per year to senior homeowners.	LSP	\$ 50,001
21	Disability Rights California	Statewide	People with disabilities	DRC will expand housing and homeless prevention work on behalf of Californians with disabilities. Specifically, DRC will provide counsel and advice, referrals, and pro-se packet to prevent homelessness, preparing and/or filing of UD answer or amended answer and reasonable accommodation requests, limited scope representation including negotiations, administrative hearing and litigation, provide technical assistance to local legal aid and community-based organization, provide Trial-Preparation, Housing, Reasonable Accommodation Clinic/Training to clients and community partners and affirmative litigation to prevent homelessness, correct <u>habitability and accessibility problems and to protect tenant rights</u> .	LSP	\$ 2,487,573
22	Disability Rights Education and Defense Fund	Statewide	QLSPs who will work people with disabilities, specifically BIPOC	DREDF will work to improve disability access in new transitional and permanent housing programs. DREDF will also continue Alameda County litigation that seeks increased supported housing and services for people with serious mental health disabilities who cycle in and out of institutions and homelessness in Alameda County. DREDF will also work to strengthen the rights of tenants with disabilities, improving habitability and preventing evictions, by participating in the Department of Fair Employment and Housing's regulatory process which will continue to address disabled tenants' rights.	SC	\$ 172,545
23	East Bay Community Law Center	Alameda	Low income tenants facing consumer debt	EBCLC will provide holistic legal services to low-income tenant-consumers who are affected by a variety of consumer debt issues, including errors on credit reports, identity theft, predatory contracts, car repossession, and consumer scams and frauds. EBCLC will expand its services to include information and limited scope assistance to tenant-consumers in small claims court for rent arrears that accrued during state and local eviction moratorium periods. EBCLC will also create and provide Know Your Rights materials for tenant-consumers facing small claims cases and distribute these materials through EBCLC's various social media platforms and <u>community partnerships</u> .	LSP	\$ 139,191
24	Elder Law & Advocacy	Imperial, San Diego	Older adult tenants	ELA will provide in-depth negotiated settlement assistance to clients in order to ensure a 'soft landing' for clients. ELA will also provide renter education focusing on tenants rights and avoiding eviction through either virtual or in-person events, targeting older adults and the caregivers and organizations who provide older adult services, in order to reach the target population.	LSP	\$ 120,783
25	Eviction Defense Collaborative	San Francisco	Low income tenants and sheltered homeless population	EDC will expand its staffing capacity to provide pre-eviction services to tenants who have received a notice of termination of tenancy, advice and counseling, full scope legal representation to tenants facing eviction, legal services to tenants who cannot otherwise be paired with an attorney for full scope representation (e.g. prepare necessary documents, provide filing instructions, educate on legal procedures), technical assistance to other nonprofits (e.g. supervision, mentorship, and training of attorneys, and second-chairing trials), rent repayment negotiations, renter education, expand our capacity in accordance with the funds provided.	LSP	\$ 50,001
26	Family Violence Appellate Project	Statewide	Domestic violence survivors in small rural and isolated areas	FVAP will extend its new Rural Housing Outreach program both to reach new communities and to maintain and strengthen ties to organizations, where agency staff turn-over is high and clients have evolving housing-related legal issues as federal and state laws change due to COVID-19 related eviction moratoriums. FVAP will also adapt and create written legal tools that are culturally accessible and appropriate to the underserved communities the project targets. Additionally, FVAP will provide technical assistance to attorneys and non-attorney advocates assisting domestic violence survivors in housing issues and, if the opportunity arises, free <u>appellate representation services or support to legal aid providers</u> .	SC	\$ 172,545
27	Family Violence Law Center	Alameda	Low income tenants	FVLC will provide eviction defense and other tenant defense assistance in landlord-tenant rental and housing disputes by retaining a part-time attorney to work to address the high levels of need, which is expected to increase exponentially as COVID-related rental protections change or expire. FVLC will continue to connect with housing and other legal services providers in our community to <u>coordinate services</u> .	LSP	\$ 50,001
28	Greater Bakersfield Legal Assistance	Kern	Low income mobile home residents	GBLA will expand services to low income individuals and families (residents) living in a mobile home park including providing counsel and advice, brief service, or direct representation. GBLA will also present workshops on the rights of mobile home residents and stakeholders who provide services to the low-income community.	LSP	\$ 449,757
29	Housing and Economic Rights Advocates	Alameda, San Francisco	Low income people, specifically people of color, older adults, people with disabilities and Limited English Proficiency	HERA will expand its services to Alameda and San Francisco Counties. These services include (1) advising and assisting tenants with filing of fair housing claims with HUD and/or DFEH and advocate with landlords to stop fair housing abuses that can lead to eviction, (2) analyzing and reducing the debt load of tenants as to non-housing collections issues that make it hard for them to keep up with rent, (3) advising tenants of their rights under the relatively new statewide rent control and just cause eviction law, (4) improve the credit of residents who are homeless so they can qualify for housing, advocating for them with prospective landlords to accept them as tenants, and filing fair housing complaints on their behalf when credit is used as a pretext for unlawful discrimination, and (5) advising and advocating for tenants for remediation of habitability problems. HERA will also provide quarterly workshops on topics <u>related to our homelessness prevention subject areas</u> .	LSP	\$ 96,561
30	Inland Counties Legal Services	Riverside, San Bernardino	Low income families living in rural areas, persons with disabilities	ICLS's proposed legal services will focus on increasing affordable housing, ensuring decent and adequate housing for low-income clients, and preserving and obtaining public benefits for vulnerable individuals. Specifically, ICLS will continue its Housing Element litigation and include a public education component to ensure that cities plan for affordable housing development and meet their residents' needs. Additionally, ICLS will expand its current tenant defense projects and emphasize systemic housing litigation which will confirm a broader benefit on vulnerable tenants facing housing issues which not only affect their households but other tenants with the same landlord or living in the same building and facing these habitability issues. ICLS will also focus on assisting disabled and vulnerable individuals at risk of homelessness in both San Bernardino and Riverside County with public benefits issues.	LSP	\$ 1,256,778

**\$31M National Mortgage Settlement Funding for Homelessness Prevention - Formula Grants**

	Organization	Geographic Scope	Constituency	Description of Services	Legal Services Provider / Support Center	Formula Grant Award
31	Inland Empire Latino Lawyers Association, Inc.	Riverside, San Bernardino	Low income tenants	IELLA will educate tenants about their rights, offer counsel and advice, and assist with document preparation regarding objections to unlawful evictions, cash-for-keys foreclosure mediation agreements, civil litigation answers to lawsuits for nonpayment of rent, small claims lawsuits for return of rental deposits, small claims lawsuits for damage to tenant's property during unlawful self-help evictions, and hardship objections to wage garnishment collection actions for nonpayment of rent.	LSP	\$ 75,933
32	Inner City Law Center	Los Angeles	Low and very low income	ICLC and its pro bono counsel partners will provide additional homelessness prevention assistance to at least 42 clients annually through representation, preeviction and eviction legal services, counseling, advice and consultation, mediation, training, renter education, and legal services to improve habitability, ensure receipt of eligible income or benefits to improve housing stability, and minor-immigration-related issues that impact housing, income and employment.	LSP	\$ 408,420
33	Justice & Diversity Center of the Bar Association of San Francisco	San Francisco	Low income tenants	JDC will provide pre-eviction tenant legal counsel and dispute resolution to prevent the filing of Unlawful Detainer cases by focusing on a number of pre-eviction issues, including payment disputes and tenant behavioral issues that are jeopardizing leases and housing, conflicts over the necessity of unit repairs and building conditions, unit habitability disagreements, sub-tenancy issues, and general lease compliance matters. Services include consultations with clients, including survivors of domestic violence, to ensure that they understand their legal rights and obligations as tenants in San Francisco and when necessary, draft and send letters to landlords and/or the Rent Board to facilitate conflict resolution and make a record of legal rights and obligations.	LSP	\$ 119,601
34	Justice in Aging	Statewide	QLSPs	This project will increase access to essential and improved income support programs that provide a basic income to help help older adults secure and maintain housing. JIA will train and mobilize a statewide network of advocates to help older adults at risk of homelessness attain and maintain Social Security Insurance benefits and deliver at least one training and disseminate at least one written product to our network each year. JIA will also work with its network to identify systemic barriers older adults face to securing needed benefits and develop and implement legal advocacy strategies, including potentially systemic litigation, to remove barriers and improve access to benefits.	SC	\$ 172,545
35	Law Foundation of Silicon Valley	Santa Clara	Low income tenants	LFSV will expand our eviction defense practice to address the surge in eviction cases caused as a result of the coronavirus pandemic. Additionally, LFSV will provide legal advice and information to tenants regarding a variety of housing issues including evictions, fair housing, habitability issues, and affordable housing, plus interpretation of COVID-19 housing laws and eviction protections. LFSV will also create educational materials and host know-your-rights sessions for tenants and providers to ensure that accurate information about current eviction protections is available.	LSP	\$ 231,015
36	Lawyers' Committee for Civil Rights	San Francisco	Low income tenants and small business owners, particularly people of color	LCCRSF will expand limited-scope services pre-litigation, including advocacy letters, negotiation or mediation with landlords, and administrative enforcement through its GUIDE program. In addition, LCCRSF will expand its Legal Services for Entrepreneurs (LSE) program, which provides direct representation, counseling and advice and consultation to low-income and minority small business owners in communities vulnerable to forces of displacement to include eviction defense for small businesses. LCCRSF will screen potential low income commercial eviction defense clients and place cases with contract attorneys.	LSP	\$ 130,524
37	Legal Access Alameda	Alameda	Low income tenants impacted by COVID-19 and natural disasters	LAA will continue and expand pre-eviction and eviction prevention services through its monthly clinic, one-on-one limited scope services and its advice and referral housing assistance for disaster victims, both COVID-19 and wildfire, through its disaster hotline and Free Legal Answers online platform.	LSP	\$ 50,001
38	Legal Aid at Work	Statewide	Formerly incarcerated persons	LAAW will help formerly incarcerated individuals, who are at extreme risk of homelessness, obtain and retain employment by ensuring that they are not wholly excluded from the labor market, and can thus earn a living that keeps them stably housed. LAAW will engage in outreach and education, as well as initiate enforcement actions under existing laws, and—where possible—conduct impact litigation on issues arising out of newly enacted, but relatively untested, statutes, ordinances, and related protections afforded to those with criminal or arrest records so that they can obtain and maintain stable housing and avoid becoming homeless.	LSP	\$ 328,485
39	Legal Aid Foundation of Los Angeles	Los Angeles	Low income tenants	LAFLA will provide representation of tenants in unlawful detainer actions, outreach and education on new renter protections, limited services or representation on tenant notices to stop evictions before they are filed or heavily litigated, intervene and provide services to prevent evictions, including advice and representation on issues such as habitability and landlord harassment, and provide more robust, efficient, and effective service for tenants and the courts. LAFLA will increase courthouse and community presence, particularly outside of downtown Los Angeles to generate community awareness of the program, screen for appropriate cases, and make referrals to participating agencies. LAFLA will also create/expand tenant rights clinics in underserved areas.	LSP	\$ 969,480
40	Legal Aid Foundation of Santa Barbara County	Santa Barbara	Low income tenants	LAFSB will represent or assist at least 130 individuals at risk of homelessness with increased support staff capacity to conduct intake for pre-eviction and eviction legal services, provide interpretation for attorney appointments/phone calls, conduct research, assist with case filings, and provide general administrative support to the attorneys. Clients in unlawful detainer cases will be prioritized with pre-eviction assistance and other tenant defense services provided as caseload and time allows.	LSP	\$ 76,782
41	Legal Aid of Sonoma County	Sonoma	Seniors, Latinos, and voucher holders	This project will continue to provide upstream eviction prevention services including negotiating pre-complaint agreements between tenants and landlords to prevent evictions. For tenants who must vacate, LASC will help remove any legal or resource barriers they have to successfully applying for new rental housing. LASC will hire a bilingual caseworker to assist with client outreach and intake. In addition, LASC will offer on-site trainings to homeless service providers to help them identify legal barriers to housing and make more effective referrals.	LSP	\$ 111,057

**\$31M National Mortgage Settlement Funding for Homelessness Prevention - Formula Grants**

	Organization	Geographic Scope	Constituency	Description of Services	Legal Services Provider / Support Center	Formula Grant Award
42	Legal Aid Society of San Bernardino	Riverside, San Bernardino	Low income and seniors	LASSB will expand the level of services provided, which is currently limited to counsel, advice, and unlawful detainer answer preparation, to include pre-eviction negotiation, assistance with Motion to Stays, Motion to Set Aside, Discovery and assistance with Reasonable Accommodations. LASSB will increase its outreach to its target population regarding the expanded eviction services.	LSP	\$ 145,251
43	Legal Aid Society of San Diego	San Diego	Low income tenants	LASSD will provide a full range of tenant defense assistance including education and outreach regarding ever-evolving tenant protections, counsel and advice, early intervention and negotiation in rental disputes, representation in eviction defense cases, bringing affirmative litigation to enforce tenants' rights, post-judgment relief including motions to vacate defaults and appeals, as well as representation in administrative matters to help obtain and maintain subsidized housing benefits for tenants.	LSP	\$ 739,260
44	Legal Aid Society of San Mateo County	San Mateo	Low income tenants eligible for pandemic-related eviction protections	LASSMC will expand pre-eviction legal services, counseling, and renter education to adapt to local, state, and federal eviction protections related to the COVID-19 pandemic to assist tenants in navigating their legal rights and obligations. Through LASSMC's established housing hotline, it will identify and consult with individual households with pre-eviction concerns about rent debt and potential eviction risk. LASSMC will also develop user-friendly tools and self-help materials to be widely available in the low-income tenant community and in collaboration with service providers and community organizers LASSMC will provide "Know Your Rights" presentations for tenant consumers, and trainings for social services providers.	LSP	\$ 56,967
45	Legal Assistance for Seniors		Seniors	LAS attorneys will provide direct legal services to seniors experiencing housing instability including direct representation in unlawful detainer actions, negotiations with landlords, review of housing notices, and other types of legal advice as needed. In addition to direct legal services, many of these clients will receive additional legal services to address other pressing needs that are jeopardizing their housing including elder abuse, public benefits advocacy, health care issues and immigration issues. Lastly, LAS will connect clients with other resources as needed including referrals to other attorneys for affirmative tenant lawsuits, in home supportive services, meal delivery services and connections to community centers for support.	LSP	\$ 50,001
46	Legal Assistance to the Elderly	San Francisco	Seniors and adults with disabilities at risk of homelessness	Increase staffing capacity to support full-scope representation defending Unlawful Detainers actions. With increased paralegal to conduct client interviews and factual investigations, drafting pleadings and correspondence, and legal research, the staff attorney is able to accept more cases.	LSP	\$ 50,001
47	Legal Services for Children	Alameda, Contra Costa, San Francisco	Low income children and youth	LSC will provide client counseling, advocating with the Child Welfare Department, filing petitions in Juvenile Court, conducting trauma-informed lawyering, and conducting outreach to providers on the options for homeless and runaway youth including foster care. In addition, LSC participates in San Francisco's cross-sector effort to stably house commercially sexually exploited children and youth. LSC will provide technical assistance to homeless and runaway shelters about how this route can provide housing stability for young people desiring to leave the streets.	LSP	\$ 62,601
48	Legal Services for Seniors	Monterey	Seniors (60+)	Expand eviction defense services for Monterey County seniors including eviction defense substandard housing, code enforcement utilities, disreputable home repair, and Landlords attempting to sidestep the State AB \$1482 Just Cause Eviction protections. Additionally LSS will provide numerous online Landlord/Tenant Legal sessions through-out the year to help educate seniors assert their rights to live in safe, clean, and affordable housing.	LSP	\$ 98,436
49	Legal Services of Northern California	Amador, Butte, Calaveras, Colusa, Del Norte, El Dorado, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Nevada, Placer, Plumas, Sacramento, Shasta, Sierra, Siskiyou, Solano,	Low income renters with focus in areas low affordable housing stock	LSNC will increase its capacity to advise, assist, and represent tenants at every stage of the eviction process through community legal education, direct advice/counsel, negotiation and full representation, particularly in cases likely to help establish tenant protections in law. LSNC will combine community legal education on more routine issues amenable to self-help with a more extensive direct representation model for tenants who have strong defenses to eviction (both related to and independent of COVID-19 protections) to sustain and expand its tenant defense practice.	LSP	\$ 1,015,743
50	Mental Health Advocacy Services	Los Angeles	Low income adults with mental health disabilities	Mental Health Advocacy Services will provide tenant defense assistance including pre-eviction legal services, counseling, advice and counsel, and legal services to individuals who participate in its community fair housing workshops.	LSP	\$ 51,708
51	National Center for Youth Law	Alameda, Monterey	Current and former foster youth	NCYL will advance litigation to address homelessness on behalf of an individual and organizational plaintiff against Alameda County in collaboration with Morgan Lewis and Youth Law Center and with input from Alliance for Children's Rights and Bay Area Legal Aid. This litigation will address the housing challenges that hundreds of non-minor dependents (NMDs) in the county regularly face. In Monterey, NCYL will engage in work to prevent homelessness and increase housing stability among youth including improving Monterey school districts' abilities to identify and support youth who are homeless or at risk of homelessness and coalition building.	SC	\$ 172,545
52	National Housing Law Project	Statewide	QLSPs that work with low income tenants	NHLP will co-counsel in anticipated litigation against the Housing and Urban Development Department regarding the Mixed Status Families Rule, increase access to housing for people with criminal records through a new initiative looking at how the housing and criminal justice system interact. NHLP will also ensure tenants' rights and housing preservation in the Low Income Housing Tax Credit program in California.	SC	\$ 172,545
53	Neighborhood Legal Services	Los Angeles	Low income families who in Los Angeles County Service Planning Areas 1, 2 and 3	Housing Advocacy for Individuals with Disabilities (Housing AID) Project will provide targeted outreach and direct services to tenants with disabilities, and advocate for reasonable accommodations, including, but not limited to, changes in a housing provider's rules, policies, practices or services that are necessary to reduce the likelihood of an eviction and provide eligible clients an equal opportunity to sustain their housing. Additionally, the project seeks to provide more comprehensive services to these litigants, including training for housing advocates on how to effectively assist adults experiencing mental health crisis, mandated assessment and tracking of the collateral needs of eligible clients, and an experienced housing navigator to facilitate appropriate referrals to	LSP	\$ 750,837

**\$31M National Mortgage Settlement Funding for Homelessness Prevention - Formula Grants**

	Organization	Geographic Scope	Constituency	Description of Services	Legal Services Provider / Support Center	Formula Grant Award
54	OneJustice	Statewide	QLSPs receiving Homelessness Prevention funding	This project will create a special training series and provide one-on-one coaching to address challenges identified by QLSPs regarding pro bono recruitment, retention, and volunteer management during the pandemic. Additionally, One Justice seeks to increase the capacity of the Pro Bono Training Institute (PBTI), an on-demand online library for pro bono attorneys seeking to volunteer at a legal aid organization throughout California, to create more trainings specific to COVID-19 and homelessness prevention.	SC	\$ 172,545
55	Public Advocates Inc.	Statewide	Low and extremely low income tenants	Public Advocates will provide ongoing analysis of new state, local, and/or federal renter protections and creation of legal rights training materials as the legal landscape evolves, and ongoing training events on renter rights for renters and community and renter organizers. In addition, it will continue to monitor illegal landlord practices (including self-help evictions, habitability, and other violations as well as violations of new laws and regulations, such as AB 3088 and the Centers for Disease Control Order), and bring litigation where appropriate, including litigation to defend tenant protections previously won; and	LSP	\$ 228,570
56	Public Counsel	Los Angeles	Individuals and families currently residing in Service Planning Areas 4 and 6	Public Counsel will provide eviction defense services, including community outreach, tenants' rights education, one-on-one counseling to eligible tenants with landlord-tenant disputes, and representation for tenants named as defendants in unlawful detainer suits. In addition, it will ensure that clients receive eligible income or benefits, and increase and preserve affordable housing through legal support and policy strategies to advance a community-driven framework for equitable and inclusive community planning in Los Angeles.	LSP	\$ 975,651
57	Public Interest Law Project	Statewide	QLSPs	PILP will continue and expand state support work with QLSPs including open cases undertaken with the EAF Homeless Prevention Funds to increase affordable housing and the prevention of homelessness. The project will have particular focus on enforcement of Housing Element Law, the protection of unhoused people, and the development and defense of COVID-19 eviction moratorium ordinances.	SC	\$ 172,545
58	Public Law Center	Orange	Low income individuals facing eviction due to COVID 19 related income losses	PLC will develop in conjunction with CommunityLegalAidSoCal (CLASoCal) a virtual clinic which will be offered by PLC weekly to provide services to clients not served by CLASoCal either because of capacity or LSC restrictions on serving undocumented persons. PLC will also expand to expand existing eviction defense and other tenant defense assistance including pre-eviction and eviction legal services, advice and consultation, and representation to tenants outside of the areas currently served including services to mobile home residents and veterans.	LSP	\$ 530,943
59	Riverside Legal Aid	Riverside	Low income tenants	RLA will provide legal services for eviction defense and other assistance in landlord-tenant rental disputes, including advice regarding future actions the tenant should take to ameliorate the dispute, negotiation directly with the landlord if appropriate, answer to summons and complaint, litigation, interrogatories, depositions, trial and other court appearances and post trial negotiation if possible and necessary. Attorneys also attend and provide trainings at meetings with other professionals involved in homelessness prevention, such as adult protective services, social workers and homelessness prevention organizations.	LSP	\$ 174,213
60	San Diego Volunteer Lawyer Program	San Diego	Low income tenants, including undocumented tenants	SDVLP will provide advice and limited assistance with answering complaints for low-income tenants, many of whom are undocumented. Additionally, SDVLP will recruit volunteers to assist in delivering these services.	LSP	\$ 173,844
61	San Luis Obispo Legal Assistance Foundation	San Luis Obispo	Low income tenants	SLOLAF will provide free legal assistance to indigent tenants who are facing eviction or who need assistance with other serious disputes with their landlord such as habitability issues, requests for reasonable accommodations or unlawful rent increases. These services will include advice and counsel as to renter's rights, community outreach and presentations on renters' rights, negotiation assistance with landlords, and eviction defense.	LSP	\$ 50,001
62	Santa Clara County Asian Law Alliance	Santa Clara	Indigent limited English speaking immigrants/refugees, elderly, and disabled	SCCALA will provide tenant defense assistance including pre-eviction and eviction legal services, counseling, advice and consultation, renter education, and representation, and legal services to improve habitability, increasing affordable housing, ensuring receipt of eligible income or benefits to improve housing stability, and homelessness prevention in the cities of Santa Clara, Sunnyvale, Cupertino, Campbell, Mt. View, Milpitas, Palo Alto, Morgan Hill and Gilroy. While the principal recipients for assistance under this project will be indigent clients, other "non-indigent" clients will also be assisted.	LSP	\$ 60,264
63	Senior Adults Legal Assistance	Santa Clara	Low-income seniors (60+)	SALA will provide expanded eviction defense or other tenant defense legal assistance to renters/tenants 60 or older in Santa Clara County including seniors residing in assisted living/residential care facilities (licensed and unlicensed) or skilled nursing facilities that are at risk of displacement or that are facing eviction. SALA will also provide expanded legal services to clients with problems related to subsidized housing or reasonable accommodations, with the goal of improving or supporting the habitability, affordability, and/or stability of the housing of clients.	LSP	\$ 50,001
64	Senior Advocacy Network	Stanislaus	Senior (60+)	SAN will increase outreach about its services to seniors who are being evicted through partnerships with senior and housing centers, the Area Agency on Aging, and others. SAN will provide new housing application assistance services including assistance with Section 8 housing to seniors facing eviction or in danger of eviction. To do this, SAN will collect and convert rental applications from the various senior apartment complexes to fillable PDF files. SAN will conduct intakes and meet with clients to complete the application, and if necessary, follow up sessions will be scheduled.	LSP	\$ 50,001
65	Senior Citizens Legal Services	San Benito, Santa Cruz	Low-income senior tenants	SCLS will increase its assistance to senior clients facing legal problems stemming from substandard housing repairs, substandard living conditions, landlords attempting to sidestep the State AB §1482 Just Cause Eviction protections, and other legal problems which threaten a senior's ability to maintain their independence in their homes.	LSP	\$ 50,001



**\$31M National Mortgage Settlement Funding for Homelessness Prevention - Formula Grants**

	Organization	Geographic Scope	Constituency	Description of Services	Legal Services Provider / Support Center	Formula Grant Award
66	USD School of Law Legal Clinics	San Diego	Low income, indigent, and potentially homeless veterans	The Veterans Legal Clinic will continue to provide critical support to low-income veterans in San Diego County to ensure they receive eligible income and benefits to improve housing stability and support homelessness prevention efforts primarily through appealing unfavorable determinations by the Department of Veterans Affairs ("VA") of their disability compensation claims and representing veterans seeking to correct the characterization of their military discharge. In addition, USD will research and identify possible veteran serving partner organizations for client referrals and to conduct "know your rights" presentations related to veterans' benefits eligibility in order to secure income for low income veterans to improve housing stability.	LSP	\$ 100,209
67	Veterans Legal Institute	Los Angeles, Orange, Riverside, San Bernardino	Indigent Veterans, both transitioning US service members and Veterans who are struggling to re-establish their civilian lives	This project will expand legal clinic services provided to prevent Veteran homelessness with expansion to an office space at Jamboree Housing's Heroes Landing at the Veterans Village in Santa Ana. Heroes Landing is designed for 70+ low income Veteran units that will serve as hub of wrap around services for the residents and the underserved Veterans in the community	LSP	\$ 50,001
68	Watsonville Law Center	Monterey, San Benito, Santa Cruz	Prioritize Covid-19, wildfire affected tenants, immigration-vulnerable households, and disabled and medically vulnerable tenants	WLC will expand services to include low-income tenants in mid- and northern-Santa Cruz County, San Benito County, and Monterey County. Legal Education and Pre-Eviction Services will identify vulnerable tenant communities through collaboration with nonprofit and public agency partners and distribute relevant educational, self-help, and referral materials. WLC will expand services to collaborate with LSC-funded legal aid partners to provide specialized education necessary for the undocumented tenants and to receive referrals for clients not eligible for LSC-funded services.	LSP	\$ 58,788
69	Western Center on Law and Poverty	Statewide	QLSPs	As a support center, WCLP will present an estimated 15 annual housing and community development-related trainings, workshops, or webinars to provide a forum to discuss current issues in low-income housing advocacy and inspire new ideas and approaches. WCLP will also provide technical assistance and back-up on housing issues to legal aid attorneys throughout the state, as well as develops an estimated 10 reports, practice tips and fact sheets, each year. WCLP will co-counsel with local legal aid programs and pro bono counsel in an estimated 15 class action and other high-impact cases that protect basic rights for all low-income Californians, addressing issues such as source of income discrimination, illegal rent increases, enforcement of affordable housing obligations, enforcement of preservation and tenant protection laws, and upholding of emergency shelter development.	SC	\$ 172,545
70	Youth Law Center	Statewide	QLSPs across the state with particular attention to outreach to QLSPs in rural counties.	As a support center, YLC will increase awareness of QLSP attorneys and advocates of the housing issues impacting children and youth in the foster care and juvenile justice systems and provide advocacy support, technical assistance, consultation, direct advice, training, written materials and other resources concerning housing issues impacting the youth populations. Each year, the project will take on: (1) an emergent or new opportunity policy issue each year; (2) a core housing access or homelessness prevention issue; and (3) responsive advocacy support on state-level responses to housing access or homelessness prevention issues that will inform work in the first two strategies and create the opportunities to identify issue areas for work in years two and three.	SC	\$ 172,545
71	Yuba-Sutter Legal Center for Seniors	Sutter, Yuba	Seniors tenants	YSLCS will increase representation of seniors in unlawful detainers and negotiate with landlords to facilitate "soft landings." Prepare educational materials directed to seniors regarding their legal rights, particularly those rights under the Tenant Protection Act. Assist senior tenants in obtaining any benefits to which they are entitled such as Cal-Fresh, Medi-Cal and Supplemental Security Income, in order to maximize the income available for housing. Enter into memorandums of understanding with other agencies that assist seniors (such as In-Home Supportive Services) to educate staff on referring clients with landlord tenant issues to the Legal Center.	LSP	\$ 50,001

**\$31 M National Mortgage Settlement Funding for Homelessness Prevention - RFP Awards**

#	Organization	Project Title	Geographic Scope	Constituency	Substantive Area(s)	Project Description	Legal Services Projects / Support Center	Grant Award
1	Central California Legal Services	Rural Housing Resources Collaborative	Merced, Tulare	Rural tenants	Landlord-tenant	This project provides attorney pre-eviction and eviction defense services, including legal representation, counsel and advice, and legal education, to preserve the rights of underserved tenants while accessing additional services to support their households in the Central Valley. CCLS attorneys and staff deliver these services through Rural Housing Resource Centers (RHRcs) co-located inside partner facilities at strategic locations in targeted communities. CCLS trains partner community based organizations' staff to develop their internal "housing navigator" capacity, further extending the project's funded services. Rural community outreach staff empower and educate targeted underserved client populations. CCLS will also engage court partners to discuss systemic change to eliminate procedural barriers, expand technology for remote court appearances and tenant e-filing. Expanded court representation using an "Attorney-of-the-Day" model and virtual pro bono attorney services are also project goals.	LSP	\$ 950,000
2	Community Legal Aid SoCal	Holistic Homelessness Prevention Project	Orange	Seniors, tenants with physical and mental disabilities, domestic violence survivors, already homeless individuals	Eviction defense	CLA SoCal, Elder Law, and Disability Rights Center will provide holistic services to clients in an effort to stabilize their housing, and to help clients who already are experiencing homelessness. The project will leverage staff to expand capacity in two ways. First, an experienced housing attorney will manage and mentor pro bono and law students as a way to bring more legal capacity to existing homelessness prevention efforts. In the longer term, the project will grow the number of motivated and knowledgeable pro bono who volunteer to help vulnerable tenants in Orange County. Second, CLA SoCal will pair case managers with housing clients to support beneficial outcomes and allow legal staff to work at the top of their license; the program will also support the development of an internship program for social work graduate students as way of creating a sustainable case management pipeline to support clients in crisis now and in the future.	LSP	\$ 650,000
3	Housing and Economic Rights Advocates	HP Statewide Tenant Stability Project	Statewide	People of color, older adults, people with disabilities, limited English proficiency	Pre-eviction legal services to address fair housing abuses	This project will expand HERA's Homelessness Prevention Project (HPP) services statewide from only four counties by increasing staffing capacity. HERA's HPP services consist of pre-eviction legal services, counseling, advice and consultation to address fair housing abuses which can result in unlawful eviction, legal services to reduce non-rent debt such that tenants' income is freed up to keep up with rent, legal services to improve credit to help homeless residents access housing, and legal services to help tenants address habitability problems which can lead to households having to move out involuntarily, even without the impetus of an eviction.	LSP	\$ 500,000
4	Inner City Law Center	Homelessness Prevention through Economic Stability	Los Angeles	Low-income renters in Los Angeles Service Planning Area 4	Provide upstream holistic legal services focused on income maximization and economic stability (including consumer debt, employment, public benefits, immigration, ticket clearing, etc.)	This project combines the efforts of Inner City Law Center, Bet Tzedek, and the LA LGBT Center break the cycle of chronic eviction many people face by looking upstream to deliver holistic legal services focused on income maximization and economic stability for the most precariously housed tenants (including undocumented) living in Los Angeles Service Planning Area 4, the most dense and diverse area of LA, where 11% of all the people experiencing homelessness in California currently live. In the face of a pandemic induced economic crisis and looming eviction tsunami, this unique and innovative project increases the economic resiliency, and therefore housing stability, of tenants living in this area, thereby preventing homelessness before it happens.	LSP	\$ 768,500
5	Legal Aid at Work	Helping undocumented immigrants experiencing housing crisis in the Central Valley avoid eviction by protecting their primary sources of income	Fresno, Madera, Merced, San Joaquin, Stanislaus, Tulare	Undocumented immigrants in the Central Valley	Employment: help undocumented workers obtain and maintain jobs and related income-maintenance benefits	LAAW will help undocumented workers in the Central Valley who are facing housing instability obtain and maintain their key sources of income by engaging in community outreach to undocumented workers who are currently experiencing eviction, homelessness, or housing insecurity to connect them with employment-related service providers. LAAW's outreach will be conducted in two parts. First, LAAW will partner with nonprofits already assisting undocumented renters in crisis in the Valley including the United Way, Project Sentinel, and Faith in the Valley and leverage its existing relationships, hotlines, and partnerships to refer workers to LAAW's statewide network of employment-related legal service providers. Second, LAAW will hire a community organizer and attorney to be based in the Central Valley to deepen LAAW's connections to housing-related service providers there and the people they serve. These two staff members will act as sources of information, referrals, and (when appropriate) legal services for these particularly vulnerable workers and their families to make sure they have enough money to pay the rent.	LSP	\$ 700,000
6	Legal Aid Foundation of Los Angeles	Tenant Debt Defense Project	Los Angeles	Black and immigrant communities, hard to reach rural areas of Los Angeles (Antelope Valley)	Consumer debt issues related to AB 3088	This project will establish a replicable model to assist tenants with the consequences of the COVID-19 Tenant Relief Act of 2020 (AB 3088), which turns outstanding rent owed into consumer debt addressed in small claims court. The project will include 1) an education campaign for tenants in the form of online resources and virtual self-help workshops, designed to educate litigants on the fundamental components of small claims court (fee waivers, filing petitions, claims limits, procedures, etc.) and preparation for small claims court; and 2) a small claims clinic designed to provide litigants with individual assistance in limited action cases. The project will develop pro bono trainings for volunteers to work with litigants to answer individual questions, draft answers and pocket briefs, prepare evidence, vacate default judgments, prepare for hearings, and provide other services. Both components will empower litigants to more effectively represent themselves in proceedings. The project may also provide assistance with settlement agreements to avoid or resolve small claims judgements. The target population will be Black and immigrant communities in Greater Los Angeles, with the potential to be replicated statewide.	LSP	\$ 650,000
7	Legal Aid Society of San Bernardino	Ensuring Equal Access through Technology	Riverside, San Bernardino	Seniors, low-income citizens and non-citizens, and eligible landlords	Eviction defense and information	This project will leverage technology in collaboration with Stanford Legal Design Lab (LDL) and Lawyaw a technology company to provide eviction defense and information. LASSB with LDL will create an SMS-Text help line that provides eligible clients general information and resources via SMS-Text. This service will reach a population that may not have direct access to the internet. LASSB with Lawyaw will build a custom interface that will allow an eligible client to enter information directly into the interface and quickly complete legal documents. The collaboration will allow LASSB to efficiently scale eviction defense. The interface will differ than other programs because it will include E-Sign and have the ability to turn word documents into fillable legal documents. The technology will also be shared with other legal services. Additionally, LASSB will create a legal advice line.	LSP	\$ 600,000
8	Mental Health Advocacy Services	Behavioral Health-Legal Community Partnership for Tenants with Mental Health Disabilities	Los Angeles	Individuals with mental health disabilities	Eviction defense	This project will continue the innovative behavioral health-legal partnership MHAS launched in 2020 in which legal services intervention specifically targeting low-income tenants with mental health disabilities at risk of homelessness is holistically integrated in partnership with two of the largest mental health services providers in Los Angeles - Didi Hirsch Mental Health Services and Mental Health America Los Angeles. These two organizations will serve hundreds of thousands of low-income individuals with mental health disabilities in Los Angeles during the three-year grant period, many of whom will have urgent legal housing needs. This project provides access to an attorney on-site at these organizations who work alongside the clinical and therapeutic staff.	LSP	\$ 250,000
9	OneJustice	Remote Court Hearing Toolkit and Technical Assistance for Housing Cases	Alameda, Contra Costa, Fresno, Imperial, Kern, Los Angeles, Madera, Monterey, Orange, Riverside, Sacramento, San Bernardino, San Diego, San Francisco, San Joaquin, San Luis Obispo, Santa Barbara, Santa Clara, Santa Cruz, Sonoma, Stanislaus, Ventura, Yuba	Low income renters in counties most impacted by COVID related job losses	Remote housing hearings	This project seeks to prevent widespread homelessness by helping legal aid advocates throughout California use remote hearings to resolve housing cases at a time when housing hearings will dramatically increase due to the economic fallout of the pandemic. As part of this program, OneJustice will develop a remote hearing toolkit to assist local efforts to tailor the toolkit to meet jurisdiction-specific needs, and provide ongoing technical assistance to QLSPs and other legal aid organizations. By the end of the grant, OneJustice will host each jurisdiction's Remote Hearing Toolkit on a California Remote Hearing Hub and make it accessible to all QLSPs and legal aid agencies. OneJustice will help legal aid attorneys work through the challenges of remote court hearings and adopt best practices in their representation of housing clients who are unable to appear in court in person due to COVID-19 public health restrictions.	SC	\$ 244,000
10	Public Interest Law Project	Unlocking Opportunities: Dismantling Land Use Segregation and Exclusion	Statewide	Lower income households, households with special needs (e.g. persons homeless, farmworkers, persons with disabilities), groups protected by fair housing laws	Technical assistance and litigation support for QLSPs on housing element preparation and enforcement	This project will train and provide expertise and litigation capacity to QLSP attorneys statewide on housing element preparation and enforcement. As due dates approach for all communities to revise the Housing Elements of their general plans to make adequate provision for the housing needs of all lower income households, PILP will deliver regional trainings followed by focused meetings with QLSPs towards developing and implementing an effective advocacy and litigation strategy.	SC	\$ 500,000
11	Public Law Center	Orange County Affordable Housing Project	Orange	Cities with economic and housing equities, such as Anaheim, Costa Mesa, Fullerton, Westminster, and Santa Ana	Increase supply of affordable rental housing through litigation, training, community engagement, representation, and regulatory advocacy	This project will increase the supply of affordable rental housing in Orange County through training, community engagement, representation, regulatory advocacy, and litigation designed to support the development of new affordable housing. Along with sub-grantees The Kennedy Commission and Orange County United Way, PLC will seek to enforce state affordable housing laws in local Orange County municipal jurisdictions so those jurisdictions appropriately plan for the development of affordable rental housing. While the Project will be countywide, the focus will be on those jurisdictions with large low-income populations, insufficient affordable housing stock, large increases in their Regional Housing Needs Assessment ("RHNA") numbers for the 2021-29 planning period and/or which have shown an unwillingness to comply with state law regarding the development of affordable rental housing. The expectation is Anaheim, Costa Mesa, Fullerton, Garden Grove, Mission Viejo, Newport Beach, Orange, San Juan Capistrano, Santa Ana, Stanton and Westminster will be among the jurisdictions of focus.	LSP	\$ 650,000
12	Western Center on Law and Poverty	Affirmatively Furthering Fair Housing in California's Rural Communities	Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus, Tulare	Farmworkers, immigrants, renters, and people with disabilities in San Joaquin Valley	Through community empowerment, training, litigation, and admin advocacy, project will apply powers of AB 686 (AFFH) and related civil rights law to maximize housing access and community development	Western Center on Law and Poverty, Disability Rights California, California Rural Legal Assistance, Inc., and California Rural Legal Assistance Foundation will work in rural California communities to prevent homelessness, increase affordable housing, and improve low-income community conditions. Through community empowerment, training and education, litigation, and administrative advocacy, all focused on the intersection of civil rights and housing law, these organizations will apply the powers of AB 686 and related civil rights laws to their fullest in order to realize greater housing access and community development in a manner that is just and equitable. The focus on rural communities in the San Joaquin Valley will inform the systemic and statewide advocacy and litigation to increase fair housing protections for all Californians.	SC	\$ 900,000



# The State Bar of California

## 2021 – 2023 Homelessness Prevention Funding Request for Proposal Application

### Background

Recognizing the need for stable housing for renters, Governor Gavin Newsom signed Assembly Bill No. 83 (Stats. 2000, ch. 15), amending Government Code section 12531 to allocate \$31,000,000 from the National Mortgage Settlement for grants to legal services organizations “to provide eviction defense or other tenant defense assistance in landlord-tenant disputes, including preeviction and eviction legal services, counseling, advice and consultation, mediation, training, renter education, and representation, and legal services to improve habitability, increase affordable housing, ensure receipt of eligible income or benefits to improve housing stability, and prevent homelessness.” The bill includes language defining how the funding is to be allocated.

Consistent with the statute, approximately \$22,087,500 (75 percent less \$1.55 million in administrative fees) will be distributed to qualified legal services providers and support centers that meet the eligibility requirements and the remaining 25 percent (approximately \$7,362,500) will be disbursed through a competitive grant process.

The relevant portion of the Government Code section 12531 has been included below for reference (**emphasis** added to the competitive grant section):

(e) (1) The funds in the National Mortgage Special Deposit Fund shall be allocated as follows:

(A) \*\*\*

(B) Thirty-one million dollars (\$31,000,000) to the Judicial Council for distribution through the State Bar to qualified legal services projects and support centers to provide eviction defense or other tenant defense assistance in landlord-tenant disputes, including preeviction and eviction legal services, counseling, advice and consultation, mediation, training, renter education, and representation, and legal services to improve habitability, increase affordable housing, ensure receipt of eligible income or benefits to improve housing stability, and prevent homelessness.

These funds shall be allocated as follows:

(i) Seventy-five percent shall be distributed to qualified legal services projects and support centers that currently provide eviction defense or other tenant defense assistance in landlord-tenant disputes as set forth in this subparagraph.

(l) To receive funds, a program shall be eligible for 2020 Interest on Lawyer Trust Fund Account (IOLTA) funding. Each eligible program shall receive a percentage equal to

that legal services project's 2020 IOLTA allocation divided by the total 2020 IOLTA allocation for all legal services projects eligible for the funding.

- (II) To ensure meaningful funding, a minimum amount of fifty thousand dollars (\$50,000) shall be allocated to an eligible program unless the program requests a lesser amount, in which case any funds that would have otherwise been allocated to the program shall be distributed proportionally to the other qualified legal services projects.
  - (III) These funds shall be distributed as soon as practicable and shall not supplant existing resources.
- (ii) Twenty-five percent shall be allocated through a competitive grant process developed by the Legal Services Trust Fund Commission of the State Bar to award grants to qualified legal service projects and support centers.**
- (I) The grant process shall ensure that a qualified legal service project or support center to receive funding demonstrate that funds received will be not used to supplant existing resources and will be used to provide services to tenants not otherwise served by that qualified legal service project or support center.**
  - (II) The commission shall determine grant awards, and preference shall be given to qualified legal aid agencies that serve rural or underserved communities which serve clients regardless of immigration or citizenship status.**
  - (III) Any funds not allocated pursuant to this competitive grant process shall be distributed pursuant to clause (i).**
- (2) No more than 5 percent of the allocations in subparagraphs (A) and (B) of paragraph (1) shall be spent for the administration of those services.

## **Eligibility**

Grant proposals must be submitted on SmartSimple **by 5:00 p.m. on Friday, October 9.**

Applicants must meet the following criteria to be eligible to submit a proposal:

- Qualified legal services projects and support centers in California that will provide eviction defense or other tenant defense assistance in landlord-tenant rental disputes, including preeviction and eviction legal services, counseling, advice and consultation, mediation, training, renter education, and representation, and legal services to improve habitability, increase affordable housing, ensure receipt of eligible income or benefits to improve housing stability, and homelessness prevention. (Note: Unlike the formula funding provided for these purposes, this RFP is open to all IOLTA-funded QLSPs and SCs, whether or not they currently provide the types of tenant assistance defined by the Budget Act).

- If programs received an allocation from the formula funding, they must demonstrate that the funds from the competitive grant will not be used to supplant those resources, or other existing resources (meaning that these funds cannot replace existing funds used to provide the same services) and will be used to provide services to tenants not otherwise served by the organization.
- Pursuant to the terms of Government Code section 12531, preference will be given to organizations that serve rural or underserved communities and that serve clients regardless of immigration or citizenship status.
- There will be no minimum or maximum funding amount for these grants.

### **Award Information**

The Legal Services Trust Fund Commission (LSTFC) or a delegated body of the LSTFC will distribute up to \$7,362,500 using a competitive RFP process. Final award decisions will be made in December 2020.

The Commission's priority with this distribution is to fund innovative, high-impact projects that propose systemic legal strategies for homelessness prevention. To encourage more novel and ambitious proposals, there is no limit on the amount a program can request in its grant proposal. Creative partnerships with IOLTA and non-IOLTA funded organizations are encouraged but not required. The Commission seeks to fund a diversity of projects throughout California and will take various factors into consideration such as impact of services, whether project goals are achievable within the grant period, and the applicants' history of delivering such services.

### **Selection Criteria**

The final dollar amount of grant awards will vary depending on the number and quality of applications received, an assessment of needs for funding of the project, and the extent to which a proposal addresses the intent of this funding, as set forth in statute. Grant award decisions are final and there is no appeals process.

A successful response to the RFP will:

- Identify the purposes for which the granted funds will be used that align with the areas set forth in the statute including the demonstrated need of the targeted population.
- Articulate the anticipated outcomes of services, including the number of people that will be served, and the nature of the impact on the lives of targeted population. Identify specific activities and deliverables that will be achieved with this grant funding during the grant period.

- Demonstrate how granted funds will not be used to supplant existing resources, including the 2021 Homelessness Prevention formula funding (meaning that these funds cannot replace existing funds used to provide these same services), and must be used to provide services to tenants not otherwise served by the qualified legal service project or support center.
- Highlight how clients in rural or unique underserved communities will be served, and/or how services will be offered regardless of immigration or citizenship status as preference will be given to projects meeting these criteria. Rural or unique underserved communities include rural or underserved geographical locations in addition to specific underserved populations who may not be served as part of the formula funding.
- Demonstrate how the QLSP or SC will track main benefits with correlating demographic data information for the clients served separately as these benefits will not be reported as part of the IOLTA/EAF Case Summary Reporting or Main Benefits.
- Identify how the proposed project fits within current organizational programming. If the project is new, identify how the organization will sustain the project and if it is replicable or scalable. Identify how information about the project will be shared with other legal aid organizations.
- The following scoring rubric will be used to evaluate all proposals:

Points/Weight	Criteria
40	<b>Proposal Quality</b> <ul style="list-style-type: none"> <li>- Proposed services are innovative, and address an unmet or underserved need (e.g. creative partnerships with other organizations, proposed project/services currently don't exist or are not being provided, project would lead to significant systemic change or other large scale progress; and/or proposed project/services is not simply an expansion of services already being provided)</li> <li>- Type and depth of legal services provided</li> <li>- Proposed goals and outcomes</li> </ul>
30	<b>Organizational Capability</b> <ul style="list-style-type: none"> <li>- Capacity or demonstrated ability to quickly scale to launch and manage proposed services</li> <li>- Strong historical performance in ability to meet goals from prior grants, timely submission of reports, ability to use grant funds as proposed and in a timely manner</li> </ul>
10	Proposed services serve rural or unique underserved communities
10	Proposed services serve clients regardless of immigration or citizenship status

5	Ability to measure and evaluate the benefits and outcomes of the project/activities
5	Potential sustainability/continuation of proposed services after the completion of the grant period
<b>100</b>	

### Grant Parameters

- Homelessness Prevention funds must be used only for “eviction defense or other tenant defense assistance in landlord-tenant disputes” as set forth in the statute. Pursuant to this language, grant funds may not be used for legislative advocacy. (Underscoring this, the Senate and Assembly have provided the State Bar with express guidance indicating that these grant funds are not intended to be used for legislative advocacy.)
- While there are no income-eligibility requirements for this funding, programs must track and screen for eligibility in order to report qualifying and nonqualifying expenditures on the IOLTA and EAF applications. For RFP applications that aim to serve higher income individuals, applicants should explain how the housing needs of the target population are currently unmet, including factors such as special needs, limited language capacity, or membership in an underserved group, and how the proposed program will meet currently unmet needs.

### Requirements/Next Steps:

<u>Estimated Date(s)</u>	<u>Activity</u>
September 8, 2020	Release RFP application in SmartSimple
September 16, 2020	Hold Convening session with grant applicants to maximize coordination and minimize duplication of efforts/projects
October 9, 2020	RFP applications due
October 9 – November 13, 2020	Initial review and scoring of applications
November 20, 2020	HP Committee meeting to review and approve funding recommendations
December 2020	LSTFC to approve funding recommendations
January 2021	Funds disbursed

### Competitive Project Budget:

**Grant Budget by Year (Three Years).** Provide information on how you propose to allocate homelessness prevention funds to the project. All three years must be completed.

Identify proposed staffing for the project for all three years. Staff should be identified based on

their role within the project, e.g., “Managing Attorney” and “Housing attorneys” not “Lila Smith and Ron Wong.” Provide the total annual full-time equivalents (FTE) within each category for the one-year grant period. Be mindful that the description of project staff, the budgets for staff and the project descriptions should tell a consistent picture. If your staffing pattern will be different during the different phases of the grant, provide the annual average in the charts, and explain in the narrative.

**Budget Narrative.** Provide an explanation for each line item in the project budget and describe the basis of allocated amounts, including whether the grant is being used to pay for specific items or is being allocated to line items on a percentage or formula basis. Please include in the budget narrative any significant in-kind support, such as use of court facilities or equipment.

Use the following definitions to complete the budget forms.

#### Personnel

1. Lawyers. Salaries and wages paid to staff attorney(s) or provisionally licensed attorneys, whether full-time, part-time or temporary.
2. Paralegals. Salaries and wages paid to staff paralegal(s) (including law graduates, legal assistants, and law students), whether full-time, part-time or temporary. Paralegals are persons working under the supervision and control of an attorney, whose duties consist primarily of such activities as intake interviewing, checking court records, legal research, and outreach and community work.
3. Other Staff. Salaries and wages paid to all other staff, including administrative and support staff, whether full-time, part-time, or temporary.

#### Subtotal.

4. Employee Benefits. Fringe benefits and payroll taxes paid on behalf of employees, such as retirement, FICA, health and life insurance, workers' compensation, unemployment insurance, and other payroll-related costs.

#### Total Personnel

#### Non-Personnel

5. Space. The actual cost of office space or other space for staff and services funded by the proposed grant and costs for maintenance of that space. This may include rent, utility payments, maintenance/janitorial expenses.



6. Equipment, Rental and Maintenance. Lease or rental expenses for equipment (except telephone) to be used by the proposed project; a commensurate share of anticipated maintenance costs for that equipment.
7. Office Supplies. Basic office supplies, including materials used in copiers and other small equipment. Equipment purchases under \$1,000.
8. Printing and Postage. Outside printing and postage costs.
9. Telecommunications. Local, long-distance, cellular telephone service, and expenses incurred directly by the proposed project. Similar and related expenses for conference calls, videoconferencing or other telecommunication services should be included as well.
10. Technology. Expenses related to computer software purchases, subscriptions, updates, and online data management, or electronic research services (e.g., Lexis-Nexis, Westlaw).
11. Program Travel. Travel expenses incurred by staff or volunteers to provide services through the proposed project.
12. Training. Non-personnel costs associated with training or continuing education for staff members or volunteers who provide services through the proposed project. You may include the cost of travel to and from training events, per diem, conference registration fees or tuition, purchase or production of training materials, etc. Do not include expenses associated with training that you provide to the public or to other organizations.
13. Library. Expenses for the maintenance and expansion of office libraries required by the proposed project, including subscriptions to periodicals, books and update services.
14. Insurance. A share of professional liability insurance and bonding costs proportionate to staff who are funded by the proposed project. A share of other insurance for property and automobiles commensurate with their use by the proposed project.
15. Litigation. Court costs, witness fees, expert witness expenses, sheriff's fees, courthouse copying fees, and other expenses incurred in litigation on behalf of eligible clients.
16. Capital Additions. Equipment and other purchases over \$1,000 per item.
17. Evaluation. Expenses for gathering and analyzing information and data and reporting on the effectiveness of services provided through the project.

18. Contract Service to Clients. Payments to private attorneys, consultants or organizations to provide professional services to litigants through the proposed project. On Form D, itemize individual contracts. Identify the proposed contractor(s), the general nature of duties to be performed, the rate(s) of compensation and the contract amount.
19. Other. Expenses not included above. Itemize individual expenses in the budget narrative.

Total Non-Personnel

Administrative

20. Personnel. Portions of personnel and personnel-related costs supporting general office operations, rather than legal program expenses
21. Non-Personnel. Portions of non-personnel costs supporting general office operations, rather than legal program expenses

Total Administrative

22. Total Sub-grants. Total amount of sub-grants

**Reporting Requirements**

The addition of \$31 million for homelessness prevention provides an excellent opportunity for legal services programs to demonstrate the efficacy of their work in addressing one of the most intractable problems in California. Demonstrating effective use of these funds is critical to support continued and/or additional funds for such purposes in the future. Grantees are required to report both quantitative and qualitative data describing the clients served and the work performed including outcomes achieved (main and economic benefits) tied to individual characteristics to demonstrate the impact/value of these additional funds.

**I. Financial Reporting Requirements**

Organizations are required to submit an annual Expenditures Report, comparing project expenditures to the approved project budget. Variances exceeding 10 percent over budget must be reported to the State Bar as promptly as possible. In addition, a final Expenditures Report will be due after the close of the grant period.

**II. Evaluation**

Organizations are required to submit an annual Evaluation Report including the following:

- A.** What impact did this grant have in the community and for the people served?  
Describe the accomplishments in both quantitative and qualitative terms.
- B.** Was a separate evaluation of the project performed? If so, please describe the results of the evaluation and your assessment of the project. Include both the weaknesses and the strengths of the project (a discussion that includes how problems were dealt with will be more helpful than one that focuses exclusively on the project's successes).
- C.** What immediate (not already captured in main benefits reporting) and long-term impacts will result from the project?
- D.** Describe any plans to continue the project after the grant period.
- E.** Identify and provide the products produced during the project. This includes representative samples of completed work like training materials, copies of any mailing, fliers, newspaper releases, articles, or other media coverage. Also describe any future publication or distribution plans for materials resulting from grant activities. Provide the URL for websites.
- F.** Identify and provide materials that document impact and outcomes of the project, including data demonstrating the effect of services rendered (e.g., client satisfaction survey results, pre and post test results, number of cases including number of cases in which stipulations were reached, number of trials, outcome of trials, etc.).
- G.** If applicable, a report on any impact litigation and advocacy work including:
  - 1. Total number of impact litigation cases (include partner/co-counsel cases) both open and closed.
  - 2. Total number of advocacy activities both completed and ongoing.
  - 3. Narrative summary for individual cases and activities.

### **III. Data Report**

In addition to the qualitative information organizations are required to submit an annual an annual Benefits Report including the following:

- A.** All benefits (outcomes) achieved for all cases according to the main benefit codes/definitions in the California Legal Aid Reporting Handbook;
- B.** Demographic data of the clients served;

- C. Economic benefits for any main benefit code that resulted in an award recovered for the client or savings for the client;
- D. Activities and services provided that are not specific to an individual client but rather a large group of individuals.
- E. Case summary on all cases (attorney-client relationship) and other services (no attorney-client relationship) during the grant period.

**Project Assurances:**

By accepting grant funds, programs agree to:

- Use funds only for stated purposes: eviction defense or other tenant defense assistance in landlord-tenant rental disputes, including pre-eviction and eviction legal services, counseling, advice and consultation, mediation, training, renter education, and representation, and legal services to improve habitability, increasing affordable housing, ensuring receipt of eligible income or benefits to improve housing stability, and homelessness prevention.
- Not use funds to supplant existing resources (meaning that these funds cannot replace existing funds used to provide these same services including the formula funding if applicable) and must be used to provide services to tenants not otherwise served by the qualified legal service project or support center.
- Comply with all reporting requirements specific to this grant.

If you have any questions, please contact:

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