



## JUDICIAL COUNCIL OF CALIFORNIA

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# REPORT TO THE JUDICIAL COUNCIL

*Item No.:* 21-153

For business meeting on October 1, 2021

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**Title**

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

**Agenda Item Type**

Action Required

**Effective Date**

October 1, 2021

**Rules, Forms, Standards, or Statutes Affected**

None

**Date of Report**

August 30, 2021

**Recommended by**

Legal Services Trust Fund Commission  
Banafsheh Akhlaghi, Cochair  
J. Eric Isken, Cochair

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### Executive Summary

The Budget Act of 2021 (Stats. 2021, ch. 21) includes over \$65 million in the Equal Access Fund for general distribution to legal services providers and support centers. The funds are to be distributed primarily in two parts: IOLTA (Interest on Lawyers' Trust Accounts)-formula grants and partnership grants (with a small amount also distributed for administration). The Legal Services Trust Fund Commission of the State Bar recommends approving distribution of \$58,147,302 in IOLTA-formula grants for fiscal year (FY) 2021–22, according to the statutory formula in the state Budget Act, and \$6,460,811 in partnership grants. The commission further requests approval of its findings that the proposed budget for each individual grant complies with statutory and other relevant guidelines.

### Recommendation

The Legal Services Trust Fund Commission recommends that the Judicial Council, effective October 1, 2021, approve:

1. The distribution of \$58,147,302 in IOLTA-formula grants for FY 2021–22 according to the terms of the state Budget Act;
2. The commission’s determination that the proposed budget of each individual grant complies with statutory and other guidelines;
3. The distribution of \$2,580,574 in Equal Access Fund partnership grants commencing January 1, 2022, to legal services agencies for programs conducted jointly with courts to provide legal assistance to self-represented litigants as set forth on pages 11–13 of Attachment A; and
4. The distribution of an additional \$3,880.237 for partnership grants to be awarded based on the application process set forth on pages 14–16 of Attachment A.

The commission’s report is included as Attachment A, *Equal Access Fund: Distribution of Funds for Partnership Grants and IOLTA-Formula Grants under the Budget Act of 2021*.

### **Relevant Previous Council Action**

The Judicial Council has approved the proposed distribution of Partnership Grants and IOLTA-formula funds for each of the past 21 years based on the recommendations of the Legal Services Trust Fund Commission.

### **Analysis/Rationale**

Since 1999, the state Budget Act has contained a provision for the allotment of \$10 million to an Equal Access Fund “to improve equal access and the fair administration of justice.” In 2018, an additional ongoing \$10 million was added to the fund. In 2021, this amount was increased to \$65 million.

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

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

The Budget Act states that “[t]he Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. ... The Judicial Council may establish additional reporting or quality control

requirements ... .”<sup>1</sup> All recipients of partnership grants are required to conduct an annual evaluation of the effectiveness of the programs and submit their evaluation results to the commission by March 1 of the following year—for this round, 2023. The Chief Justice, as chair of the Judicial Council, appoints one-third of the voting members to the commission—five attorney members and two public members, one of whom is a court administrator. The Chief Justice also appoints three nonvoting judges to the commission—two trial court judges and one appellate justice. The membership roster is in the commission’s report (Attachment A) at pages 18–20.

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

Applications for the anticipated \$2.6 million in funding for partnership grants were due on March 18, 2021, and recommendations were approved by the Legal Services Trust Fund Commission on August 13, 2021. The funds available for Partnership Grants were increased by approximately \$4 million in the Budget Act of 2021. In order to ensure effective distribution of those funds, the commission will issue a new grant application in the fall of 2021 for grants to commence on April 1, 2022, and end in December 2023.

For the grant period funded by the 2021 Budget Act, the Legal Services Trust Fund Commission has approved a schedule for allocation of the part of the Equal Access Fund grants referred to as IOLTA-formula grants to legal services providers according to the formula established under the Business and Professions Code.

The commission’s report on the allocation of the Equal Access Fund shows that the commission has followed the statutory requirements and the additional criteria adopted by the council at its August 1999 meeting. Therefore, it is appropriate for the Judicial Council to approve the distribution of \$58,147,302 in IOLTA-formula grants awarded by the Legal Services Trust Fund Commission to allow distribution to the eligible organizations. It is also appropriate for the council to approve \$6,460,811 in partnership grants.

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

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<sup>1</sup> Relevant portions of the Budget Act are in the commission’s report (Attachment A), at pages 20–24.

### **Policy implications**

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

### **Comments**

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

### **Alternatives considered**

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

### **Fiscal and Operational Impacts**

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

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

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

### **Attachments**

1. Attachment A: *Equal Access Fund: Distribution of Funds for Partnership Grants and IOLTA-Formula Grants under the Budget Act of 2021*



# The State Bar of California

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## **ATTACHMENT A to the report: Equal Access Fund: Distribution of Funds for Partnership Grants and IOLTA-Formula Grants under the Budget Act of 2021**

**DATE:** August 18, 2021

**TO:** The Judicial Council of California

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

**CC:** Banafsheh Akhlaghi, Co-Chair, Legal Services Trust Fund Commission  
Eric Isken, Co-Chair, Legal Services Trust Fund Commission

**SUBJECT:** Equal Access Fund: Distribution of Funding for IOLTA-Formula Grants and Partnership Grants Under the Budget Act of 2021

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### **EXECUTIVE SUMMARY**

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

The purpose of this memo to provide an overview of the EAF grants administered on behalf of the Judicial Council by the Legal Services Trust Fund Commission and the State Bar in 2021 and also requests the Judicial Council's distribution of \$65,697,980 for the 2022 calendar year for the EAF IOLTA-formula Grants and Partnership Grants authorized by the Budget Act of 2021.

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### **BACKGROUND**

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

- Ninety percent of the grant funds are to be distributed to IOLTA-eligible legal services providers according to a formula set forth in California's IOLTA statute. These are known

as “IOLTA-formula” grants.

- Ten percent of the grant funds are set aside for Partnership Grants to IOLTA-eligible legal services providers for “joint projects of court and legal services programs to make legal assistance available to pro per litigants.”

These grants are administered through the Legal Services Trust Fund Commission of the State Bar of California (see Attachment A1), but recommendations for the distribution of the grant funds must be approved by the Judicial Council. Relevant portions of the Budget Act of 2021 are included in Attachment A2.

The initial appropriation for the EAF in 1999 was \$10 million. This amount has since been increased with the addition of State Appropriation Limit (SAL) funding for a few years, filing fee revenue,<sup>1</sup> and in more recent years, the appropriation of additional general fund monies.<sup>2</sup> In 2021, the Legislature increased the appropriations for the EAF by \$50 million, \$45 million of which is to be distributed through the Legal Services Trust Fund Commission. The Legislature further included in the EAF \$40 million of Coronavirus Fiscal Recovery Funds for grants to organizations providing homelessness prevention legal services. A separate report will be submitted regarding those funds.

## **THE LEGAL SERVICES TRUST FUND PROGRAM**

### **Eligibility for EAF IOLTA-Formula Grants**

The Budget Act requires that 90 percent of the Equal Access Fund (EAF) grants be distributed “to qualified legal services projects and support centers as defined in sections 6213 through 6215 of the Business and Professions Code.” Those provisions establish the basic eligibility requirements for the two categories of organizations that are entitled to receive IOLTA funding:

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

All legal services projects and support centers receiving IOLTA and EAF funding must be nonprofit corporations, maintain quality control procedures approved by the Commission, and meet minimum funding and service criteria that are set out in Business and Professions Code sections 6214-6215. Business and Professions Code sections 6210-6228 (referred to as the IOLTA statute) require recipient legal services projects to use these grants to provide free civil

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<sup>1</sup> Since 2006, the Budget Act has allocated \$4.80 from first paper filing fees to the Equal Access Fund, with 90 percent of these funds directed to IOLTA-Formula grants and 10 percent reserved for Partnership Grants.

<sup>2</sup> In 2016, the EAF general fund was increased by \$5 million to \$10,392,000. In 2017, it was increased by an additional \$5 million to \$20,392,000. In 2019, the Legislature provided a one-time increase of \$20 million to EAF to fund homelessness prevention activities.

legal services to indigent persons in the counties for which the funds are allocated. In addition, legal services projects must make extra efforts to increase services to especially disadvantaged and underserved client groups. Recipient support centers must publicize the availability of their services and demonstrate that they actually provide legal support without charge to qualified legal services projects on a statewide basis.<sup>3</sup>

### **Administration and Oversight**

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

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

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

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

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

After the grant year concludes, grant recipients provide written reports of their expenditure of grant funds, services provided, clients or customers served, and the impact of their services. Monitoring visits supplement review of the application and budget documentation to ensure compliance with statutory requirements and grant conditions as well as to evaluate provider effectiveness and validate the provider's fiscal practices for the handling of grant funds. State Bar staff, sometimes joined by Commission members and Judicial Council staff, conduct these

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<sup>3</sup> Business and Professions Code, §§ 6218, 6220, 6221, 6223.

visits on a three-year cycle. While monitoring has typically been conducted on-site, due to the COVID-19 pandemic and in coordination with the Judicial Council, it is currently being conducted by videoconference until it is safe to resume in-person visits.

### **Eligibility for Partnership Grants**

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

The Budget Act identifies four essential elements for Partnership Grants:

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

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

### **Administration and Oversight of Partnership Grants**

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

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

Because all recipients of the Partnership Grants already receive IOLTA and EAF IOLTA-formula Grants through the State Bar, they are already subject to the oversight processes in place,

including monitoring visits to each organization every three years and submitting an evaluative report at the end of grant year reporting.

## **DISCUSSION**

### **2021 GRANTS ADMINISTRATION**

Pursuant to the Judicial Council's approval of recommended EAF grants last year, the State Bar is currently administering the 2021 EAF IOLTA-formula and Partnership Grants.

#### **2021 EAF IOLTA-formula Grants**

The approved \$23,286,600 for 2021 IOLTA-Formula Grants provides support to a total of 99 Legal Services Projects and Support Centers. The funds help the most vulnerable Californians when they face critical, life-changing legal issues affecting basic needs, safety, and security. Grantees handle a wide variety of legal issues, including but not limited to elder abuse, domestic violence, family support, housing, and access to health care. Among those served are the working poor, children, people who live in isolated rural areas, veterans, people with limited English proficiency, people suffering abuse, people with disabilities, and the elderly. The statewide pandemic has only exacerbated the severity of these issues and made the funded legal services that much more valuable.

A list of the 2021 grant recipients under the Budget Act of 2020 is included as Attachment A3.

#### **2021 Partnership Grants**

The approved \$2,587,400 for the 2021 Partnership Grants provides support for 36 projects from 24 organizations that enhance the ability of unrepresented litigants to pursue justice in civil courts across California. These projects offer services in a variety of substantive areas, including but not limited to, housing, family, guardianship, estate planning, and small claims. In response to the court closures due to the pandemic, most programs have pivoted from initial plans and are currently providing remote and/or hybrid services to litigants. A list of the 2021 Partnership Grant recipients is included as Attachment A3.

Also, for the 2021 grant year, staff is in the process of working with the Judicial Council to develop training via webinar for current grantees intended to better their understanding of reporting requirements and provide technical assistance and resources.

### **2022 GRANTS ADMINISTRATION**

#### **2022 EAF IOLTA-formula Grants**

The 2022 EAF IOLTA-formula grant applications were released on April 2, 2021 and due on May 14, 2021. From May through July, State Bar staff and the Eligibility & Budget Review Committee reviewed applications to determine if applicants (1) meet primary purpose; (2) have identified

appropriate qualified expenditures; and (3) have adequate quality controls in place, as determined by the State Bar, to ensure proper oversight and service.

The State Bar received 108 applications for funding for grant year 2022. There were 100 renewal applications and eight new applications for funding. Two new applicants subsequently withdrew, leaving six new applicants. The Commission met on August 13, 2021 and approved funding for 103 qualified legal services providers and support centers. The State Bar then calculated the grant award for each program based on funds available for EAF IOLTA-formula Grants under the Budget Act of 2021. Staff notified the organizations of their grant award and requested a program budget. Proposed budgets will be reviewed by State Bar staff to ensure grantee compliance with the statute, rules and guidelines, prior to distribution of grant funds. Proposed budgets will be presented to the Commission for approval at its November 13, 2021 meeting. Attachment A6 is a standard version of the grant agreements used for 2021 grants; we do not anticipate any substantive changes to the 2022 grant agreement.

The total estimated amount for 2022 EAF IOLTA-formula grants is \$58,381,480. Attachment A7 includes a list of 2022 EAF -IOLTA recipients.

### **2022 Partnership Grants**

Request for Proposals for the Partnership Grant was released on January 29, 2021 and due on March 18, 2021.

New for the 2022 Partnership Grants application process was the implementation of a formal scoring rubric with the goals of providing transparency to applicants, clarity to Committee members, and ensure equity in the review process. The scoring rubric was included in the Request for Proposals (RFP) and the application was updated to align with the rubric categories. A copy of the 2022 RFP and a sample application are provided as Attachment A4.

Staff made concerted outreach efforts to garner interest from potential applicants. After the RFP was released, the State Bar held a webinar on February 2, 2021, to review the 2022 RFP requirements, the new scoring rubric, and updates made to the application. This webinar was attended by more than 60 participants, including current grantees, potential applicants, and judicial staff from various self-help centers. State Bar staff and Judicial Council staff also made targeted outreach to QLSPs serving counties not currently funded by Partnership Grants or where courts had expressed an interest in a potential partnership. As a result of these increased outreach efforts, over 50 proposals were initiated in advance of the March 18 deadline. Of those proposals, 36 proposals were ultimately submitted, coming from 26 legal services providers.

The majority of the 2022 proposed projects are currently funded. Five proposals are seeking funding for new projects and eight projects are seeking funding for sixth year or beyond. Requested funding amounts for the 2022 Partnership Grant year ranged from \$25,000 to \$150,000. The proposed projects would address 13 substantive areas, with a majority of projects providing services in housing and family/domestic violence. The proposed projects

would also span 18 counties, including rural and densely populated counties throughout California.

Several processes were developed to ensure consistent scoring and interpretation of the rubric categories by the review teams, which were comprised of two Partnership Grant Committee members and one staff member. Another change was that instead of one Committee member being the sole reviewer of a small subset of proposals, each review team member reviewed the same assigned subset of proposals.

Following the application deadline, staff confirmed that all projects met threshold eligibility requirements. The Committee and review teams also conducted several calibration sessions to ensure that the scoring rubric was applied correctly and consistently. In order to address any scores that did not reach a consensus on a particular section, the review teams took the average of each team member’s score in order to calculate a final score for all proposals.

On May 7, 2021, the Committee reviewed all final rubric scores and developed tentative funding recommendations, based on past practice and in consideration of the criteria outlined in the rubric as well as other priority factors such as serving rural counties or substantive areas with anticipated increased need for 2022.

Applicants were provided an opportunity to provide feedback about the potential impact of the tentative funding amount on their proposed project and to ask follow-up questions about the application review process. The Committee confirmed funding recommendations on July 29, 2021. The Commission adopted those recommendations on August 13, 2021 and presents them now to the Judicial Council. The Council has final responsibility for approving the Commission’s recommendations for grant awards at its September 2021 meeting.

The total estimated amount for 2022 Partnership Grant Awards is \$2,580,574. The Commission requests the Council’s approval for the following Partnership Grant awards.

<b>Number</b>	<b>Applicant</b>	<b>Project</b>	<b>County(ies)</b>	<b>Recommendation</b>
1	Bet Tzedek Legal Services	Decedent’s Estate Self-Help Clinic	Los Angeles	\$120,000
2	Bet Tzedek Legal Services	Remote Pro Se Technology Initiative	Los Angeles	\$120,000
3	California Rural Legal Assistance, Inc.	San Joaquin Housing Helpline Court Clinic Partnership	San Joaquin	\$120,000
4	Central California Legal Services	Guardianship Project	Fresno	\$41,000
5	Central California Legal Services	Tenant/Landlord Housing Law Project	Fresno	\$60,000
6	Central California Legal Services	Tulare County Unlawful Detainer Workshop	Tulare	\$70,000

7	Community Legal Aid SoCal	Compton Self-Help Economic Expansion Project	Los Angeles	\$92,000
8	Community Legal Aid SoCal	Orange County Consumer Debt Workshop/Clinic	Orange	\$23,000
9	Community Legal Aid SoCal	Unlawful Detainer Workshop - Norwalk Courthouse	Los Angeles	\$60,000
10	Elder Law & Advocacy	Imperial County Unlawful Detainer Clinic	Imperial	\$74,000
11	Family Violence Law Center	Domestic Violence Pro Per (DVPP) Project	Alameda	\$21,000
12	Inland Counties Legal Services	Consumer Rights Clinic	San Bernardino	\$88,000
13	Justice & Diversity Center of the Bar Association of San Francisco	Shriver - SASH Self-Help	San Francisco	\$36,000
14	LACBA Counsel for Justice	LACBA-Domestic Violence Legal Services Project	Los Angeles	\$80,000
15	Legal Access Alameda	Family Law Day of Court	Alameda	\$25,000
16	Legal Access Alameda	Family Law Settlement Conference	Alameda	\$61,000
17	Legal Aid Foundation of Los Angeles	2022 - Torrance Self-Help Center	Los Angeles, Orange	\$84,000
18	Legal Aid Foundation of Santa Barbara County	Legal Resource Center Partnership	Santa Barbara	\$115,000
19	Legal Aid of Marin	Homelessness Prevention through Mandatory Settlement Conferences	Marin	\$80,000
20	Legal Aid Society of San Bernardino	Caregivers and Small Estates Accessing Justice	San Bernardino	\$85,000
21	Legal Aid Society of San Diego	Name Change & Gender Marker Change Self-Help Clinic	San Diego	\$75,000
22	Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion Project	San Diego	\$72,574
23	Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	Alameda	\$48,000
24	Legal Assistance for Seniors	Partnership to Assist Limited	Alameda	\$60,000

		Conservatorship Litigants		
25	Legal Services of Northern California	Yolo Consumer Clinic	Yolo	\$67,000
26	Neighborhood Legal Services	CHATSWORTH CONSUMER TECHNOLOGY PARTNERSHIP GRANT	Los Angeles	\$90,000
27	Neighborhood Legal Services	PASADENA CONTINUUM OF SERVICES	Los Angeles	\$81,000
28	Neighborhood Legal Services	STABILIZING FAMILIES' PARTNERSHIP GRANT	Los Angeles	\$100,000
29	Public Counsel	Guardianship Clinic	Los Angeles	\$22,000
30	Public Law Center	DeFacto & Adoptive Parent Assistance Project	Orange	\$47,000
31	Public Law Center	Orange County Courthouse Guardianship Clinic	Orange	\$32,000
32	Riverside Legal Aid	small estates partnership	Riverside	\$70,000
33	San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	San Diego	\$93,000
34	San Luis Obispo Legal Assistance Foundation	San Luis Obispo County Rental Clinic	San Luis Obispo	\$110,000
35	Santa Clara University Alexander Law Center	Consumer Debt Clinic	Santa Clara	\$50,000
36	Senior Citizens Legal Services	Indigent Landlord/Tenant Services and Mediation	Santa Cruz, San Benito	\$108,000

Attachment A5 includes a brief summary of each project.

**INCREASE TO EQUAL ACCESS FUNDS**

On June 28, Governor Newsom signed Assembly Bill 128, the Budget Act of 2021. The budget act included approved an increase of \$70,392,000 in Equal Access Funds. The Equal Access Fund provision of the budget was subsequently amended by Senate Bill 129 to make minor corrective amendments.<sup>4</sup> SB 129 provides that \$65,392,000 of the funds “...are to be distributed by the Judicial Council through the Legal Services Trust Fund Commission to qualified legal services

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<sup>4</sup> The Equal Access Fund language was further amended by AB 164 to clarify language related to homelessness prevention funding.

projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used for legal services in civil matters for indigent persons.” The remaining \$5,000,000 will be administered by the California Access to Justice for innovation grants.

Of the \$65,392,000, “Up to 10 percent of the funds ... shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and not less than 90 percent of the funds ... shall be distributed consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code.” In addition, “not more than 2.5 percent shall be available, upon order of the Department of Finance, for administrative costs of the Judicial Council and the State Bar.”

SB 129 further stipulates that the EAF funds are available for encumbrance or expenditure until June 30, 2023. This funding also has additional reporting requirements. See Attachment A2 for relevant language from SB 129.

### **Proposed Plan for Additional EAF IOLTA-Formula Funds**

To provide more flexibility to grantees, the Legal Services Trust Fund Commission met on August 13, 2021 and determined that grantees may submit a two-year budget proposal instead of the typical one-year budget. Because of the express authorization in the bill, and the anticipated reduction of \$30 million in the 2022 Budget Act (still representing an increase of \$20 million over the 2020 budget) the Commission determined that a two-year budget may help programs plan more effectively for managing ebbs and flows, hiring staff, establishing new programs, and developing needed infrastructure and support. Alternatively, programs that are currently experiencing an increased demand for services and the ability to hire quickly may elect a one-year budget. Given the substantial increase in funding, the Commission believes that providing budgeting flexibility will allow programs the ability to better tailor services to meet their individual organizational and community needs.

### **Proposed Plan for Additional Partnership Grant Funds**

The Legal Services Trust Fund Commission met on August 13, 2021 to discuss a distribution plan and timeline for the additional \$3,880,237 in Partnership Grant funding resulting from the budget increase. This following plan was adopted.

- The additional Partnership Grant funding will be administered as a separate grant under a new competitive grant process.
- Applicants for this new funding opportunity would be subject to the same threshold eligibility requirements required of all Partnership Grant grantees
- Applicants will have two options:
  - Option 1: Apply for supplemental funding for an existing 2022 Partnership Grant project up to the total originally requested amount. Grant period will be April 1, 2022 – December 31, 2022.
  - Option 2: Apply for a new Partnership Grant project with a grant period of April 1, 2022 – December 31, 2023

- The RFP will be released on November 12, 2021 and due December 17, 2021
- Any unallocated Partnership Grant funding will be added to the general Equal Access Fund for formula distribution to IOLTA/EAF eligible QLSPs and Support Centers.

## **2022 DISTRIBUTION REQUEST TO THE COUNCIL**

The State Bar requests an estimated 2022 grant distribution of (1) \$65,697,980 pursuant to the Budget Act of 2021 for EAF IOLTA-formula Grants, Partnership Grants, and costs of administration; and (2) approval of the grants specified below as follows:<sup>5</sup>

### **2022 EAF IOLTA-Formula Grants – Distribution Request**

The State Bar requests that the Judicial Council approve 2022 EAF IOLTA-formula Grants in the amount \$58,147,302, which includes the General Fund Budget Act allocation of \$57,381,480 and projected filing fee revenue of \$765,822.

### **2022 Partnership Grants – Distribution Request**

The State Bar requests a distribution of \$2,580,574 for 2022 Partnership Grants, and further requests the Judicial Council approve additional supplemental funding of Partnership Grants in the amount of \$3,880,237 for calendar year 2022. The total amount requested for Partnership Grants is \$6,460,811, which includes the General Fund Budget Act allocation of \$6,375,720 and projected filing fee revenue of \$85,091.<sup>6</sup> These discretionary grants are being awarded exclusively to organizations that are eligible for IOLTA funding, after a careful analysis of grant proposals, based on established criteria. Partnership Grants will, upon approval, be distributed as early in 2022 as practicable to projects that have completed the required documentation.

### **2022 Administrative Allocation**

The 2021 Budget Act allocates of 2.5 percent for administrative costs. The State Bar requests that the Judicial Council approve a distribution of \$1,089,867 for administrative costs, which is two-thirds of the total amount. The remaining one-thirds is the Judicial Council's share of administrative costs.

## **NEXT STEPS**

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

The estimated 2022 distribution of four equal disbursements for IOLTA-formula Grants to legal services providers determined by the Commission to be in compliance with statutory and other applicable guidelines, eligible grantees are identified in Attachment A7. The funds will be paid

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<sup>5</sup> The sum actually allocated as grants may vary from this figure by a negligible amount due to rounding.

<sup>6</sup> There were no returned partnership grant funds for the 2020 grant cycle.

out to the eligible legal services programs quarterly (or as close to quarterly as possible depending on contract timing), for the 2022-2023 fiscal year.

The distribution of \$2,580,574 for Partnership Grants, and the approval of the Partnership Grants recommended by the Legal Services Trust Fund Commission as set forth in detail in Attachment A5.

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

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

## **SUMMARY OF COUNCIL ACTION REQUESTED**

The State Bar requests that the Judicial Council approve a distribution of \$65,697,980 to the State Bar pursuant to the Budget Act of 2021. This sum includes:

- (1) \$64,608,113 of funding for Equal Access Fund grants, including a General Fund allocation of \$63,757,200 and additional filing fee revenue of \$850,913 under the Uniform Civil Fees and Standard Fee Schedule Act. By the terms of the Budget Act, \$58,147,302 (90 percent) of these funds is allocated to EAF IOLTA-formula Grants and \$6,460,811 (10 percent) is allocated to Partnership Grants.
- (2) \$1,089,867 for administrative costs to the State Bar pursuant to the Budget Act. The remaining \$544,933 is the Judicial Council's share of administrative costs.

The above requests excludes returned and residuary funding of \$225,680 for Partnership Grants, and the total EAF reserve as of December 31, 2020 is \$2,250,913. Since the filing fee revenue is based in part on projections, if there are excess filing fee revenue, the State Bar proposes using these funds to supplement the EAF reserves. Reserve funds will be used to cover any future disbursements delays or shortfalls in filing fee projections. Council approval is necessary to enable timely distribution of funds.

## **ATTACHMENTS LIST**

- A1.** Legal Services Trust Fund Commission Roster as of August 14, 2021
- A2.** Relevant Portions of the 2021 State Budget Act

- A3.** IOLTA-Formula Equal Access Fund Grant Recipients for 2021
- A4.** Request for Proposals and Sample Application for 2021 Partnership Grants
- A5.** Funding Recommendation and Summary of Proposals for 2022 Partnership Grants
- A6.** Sample Grant Agreement for 2020 IOLTA-Formula Equal Access Fund Grants
- A7.** 2022 EAF IOLTA Eligible Grantees

**LEGAL SERVICES TRUST FUND COMMISSION 2020-2021  
OPEN ROSTER**

<p><b>Banafsheh Akhlaghi, Co-Chair (2023)</b> email: bakhlaghi1600@gmail.com  (Judicial Council appointee)</p>	<p><b>J. Eric Isken, Co-Chair (2024)</b> Retired  email: eric.isken@outlook.com  (State Bar appointee)</p>
<p><b>Richard G. Reinis, Co-Vice Chair (2022)</b> email: rreinis@thompsoncoburn.com  (State Bar appointee)</p>	<p><b>Kim Savage, Co-Vice Chair (2022)</b> email: kim@kimsavagelaw.com  (State Bar appointee)</p>
<p><b>Amin Al-Sarraf (2024)</b> email: aalsarraf@glaserweil.com  (State Bar appointee)</p>	<p><b>Jeffrey K. Ball (2024)</b> email: jball@friendlyhillbank.com  (State Bar appointee)</p>
<p><b>Kim Bartleson (2021)</b> email: kimb@humboldtcourt.ca.gov  (Judicial Council appointee)</p>	<p><b>Hon. Louise Bayles-Fightmaster (2021)</b> email: lbfjd@yahoo.com  (Judicial Council appointee)</p>
<p><b>Pamela M. Bennett (2022)</b> email: pammers1962@gmail.com  (State Bar appointee)</p>	<p><b>Catherine Blakemore (2022)</b> email: catherine.blakemore@gmail.com  (State Bar appointee)</p>
<p><b>Will Boschelli (2023)</b> email: william.boschelli@gmail.com  (State Bar appointee)</p>	<p><b>Erica Connolly (2022)</b> email: Erica.connolly@doj.ca.gov  (State Bar appointee)</p>

**LEGAL SERVICES TRUST FUND COMMISSION 2020-2021  
OPEN ROSTER**

<p><b>Prof. Herman L. DeBose (2021)</b> email: herman.debose@csun.edu  (Judicial Council appointee)</p>	<p><b>Prof. Rebecca Delfino (2021)</b> email: Rebecca.Delfino@lls.edu  (Judicial Council appointee)</p>
<p><b>Corey N. Friedman, (2022)</b> email: cfriedman@dir.ca.gov  (Judicial Council appointee)</p>	<p><b>Zahirah Mann (2023)</b> email: zahirah.mann@gmail.com  (State Bar appointee)</p>
<p><b>Prof. James Meeker (2023)</b> email:jwmeeker@uci.edu  (State Bar Appointee)</p>	<p><b>Bob Planthold (2023)</b> email: political_bob@att.net  (State Bar appointee)</p>
<p><b>Christian Schreiber (2023)</b> email: christian@osclgal.com  (State Bar appointee)</p>	<p><b>Christina S. Vanarelli (2022)</b> email: Christina@YourVenturaCountyLawyer.com  (State Bar appointee)</p>
<p><b><u>ADVISOR</u></b>  <b>Hon. Lisa R. Jaskol (2021)</b> email: LJaskol@lacourt.org  (Judicial Council appointee)</p>	<p><b><u>ADVISOR</u></b>  <b>Hon. William J. Murray, Jr. (2022)</b> email:william.murray@jud.ca.gov  (Judicial Council appointee)</p>
<p><b><u>ADVISOR</u></b>  <b>Hon. Brad Seligman (2021)</b> email: bseligman@alameda.courts.ca.gov  (Judicial Council appointee)</p>	<p><b><u>LIAISON</u></b>  <b>Salena Copeland</b> email: SCopeland@LAACOnline.org</p>

**2021 BUDGET ACT LANGUAGE RELEVANT TO THE EQUAL ACCESS FUND**

**California Legislature – 2020-2021 Regular Session**

**Senate Bill No. 129**

**CHAPTER 69**

**An act to amend the Budget Act of 2021 by amending [numerous sections of] that act, relating to the state budget, and making an appropriation therefor, to take effect immediately, budget bill.**

**Approved by Governor July 12, 2021. Filed with Secretary of State July 12, 2021.**

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

[....]

**SECTION 0250-101-0001**

**For local assistance, Judicial Branch ..... 236,603,000**

Schedule:

- (1) 0150010-Support for Operation of Trial Courts ..... 148,551,000
- (2) 0150051-Child Support Commissioner Program (AB 1058) ..... 59,082,000
- (3) 0150055-California Collaborative and Drug Court Projects ..... 5,748,000
- (4) 0150075-Grants—Other ..... 18,495,000
- (5) 0150083-Equal Access Fund ..... 70,392,000
- (6) Reimbursements to 0150051-Child Support Commissioner Program (AB 1058).....  
..... -59,082,000
- (7) Reimbursements to 0150055-California Collaborative and Drug Court Projects.....  
..... -4,588,000
- (8) Reimbursements to 0150075-Grants—Other ..... -1,995,000

Provisions:

1. In order to improve equal access and the fair administration of justice, the funds appropriated in Schedule (5), after distribution of the \$5,000,000 appropriated in Provision 2, are to be distributed by the Judicial Council through the Legal Services Trust Fund Commission to qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used for legal services in civil matters for indigent persons. The Judicial Council shall approve awards made by the commission if the

council determines that the awards comply with statutory and other relevant guidelines. Up to 10 percent of the funds in Schedule (5) shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and not less than 90 percent of the funds in Schedule (5) shall be distributed consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. Any funding not allocated for joint projects shall be redistributed consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. The Judicial Council may establish additional reporting or quality control requirements consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code. Of the amount appropriated in Schedule (5), not more than 2.5 percent shall be available, upon order of the Department of Finance, for administrative costs of the Judicial Council and the State Bar.

2. In order to improve equal access and the fair administration of justice, \$5,000,000 shall be annually appropriated in Schedule (5) by the Judicial Council to the California Access to Justice Commission for grants to civil legal aid nonprofits, including qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used to support the infrastructure and innovation needs of legal services in civil matters for indigent persons. Of this amount, not more than 1 percent shall be available for administrative costs of the California Access to Justice Commission associated with distributing and monitoring the grants.

3. The California Access to Justice Commission shall make award determinations for grants described in Provision 2. In awarding these grants, preference shall be given to qualified legal aid agencies' proposals that focus on services to rural or underserved immigrant communities regardless of citizenship status and proposals that are innovative or that involve partnership with community-based nonprofits. Any funding not allocated in a given fiscal year shall be reallocated pursuant to Provision 1.

4. The grant process described in Provision 2 shall ensure that any qualified legal service project and support center demonstrates a high need for infrastructure and innovation to ensure that funding is distributed equitably among qualified legal service projects and support centers. The qualified legal service project or support center shall demonstrate that funds received under this provision will not be used to supplant existing resources.

5. The funds appropriated in Schedule (5) are available for encumbrance or expenditure until June 30, 2023.

[....]

**SECTION 0250-101-0932**

**For local assistance, Judicial Branch, payable from the Trial Court Trust Fund.....**  
..... **2,870,770,000**

Schedule:

(1) 0150010-Support for Operation of Trial Courts .....	2,280,300,000
(2) 0150019-Compensation of Superior Court Judges .....	396,033,000
(3) 0150028-Assigned Judges .....	29,812,000
(4) 0150037-Court Interpreters .....	132,145,000
(5) 0150067-Court Appointed Special Advocate (CASA) program .....	2,913,000
(6) 0150071-Model Self-Help Program .....	957,000
(7) 0150083-Equal Access Fund .....	5,482,000
(8) 0150087-Family Law Information Centers .....	345,000
(9) 0150091-Civil Case Coordination .....	832,000
(10) 0150095-Expenses on Behalf of the Trial Courts .....	21,952,000
(11) Reimbursements to 0150010-Support for Operation of Trial Courts .....	-1,000

Provisions:

[....]

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

9. Funds available for expenditure in Schedule (7) may be augmented by order of the Director of Finance by the amount of any additional resources deposited for distribution to the Equal Access Fund Program in accordance with Sections 68085.3 and 68085.4 of the Government Code. Any augmentation under this provision shall be authorized not sooner than 30 days after notification in writing to the chairpersons of the committees in each house of the

Legislature that consider appropriations, the chairpersons of the committees and appropriate subcommittees that consider the State Budget, and the Chairperson of the Joint Legislative Budget Committee, or not sooner than whatever lesser time the chairperson of the joint committee, or the chairperson’s designee, may determine.

[....]

**SECTION 0250-162-8506**

**For local assistance, Judicial Branch, payable from the Coronavirus Fiscal Recovery Fund of 2021 ..... 40,000,000**

Schedule:

(2) 0150083-Equal Access Fund ..... 40,000,000

Provisions:

1. The funding in Schedule (2) shall be distributed by the Judicial Council through the Legal Service Trust Fund Commission to qualified legal service projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used for legal services in civil matters for indigent persons. The Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. Up to ten percent of the funds in Schedule (2) shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants, and at least 90 percent of the funds in Schedule (2) shall be distributed consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. Any funding not allocated for joint projects shall be redistributed consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. The Judicial Council may establish additional reporting or quality control requirements consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code.

2. The funding in Schedule (2) shall be distributed by the Judicial Council through the Legal Service Trust Fund Commission of the State Bar pursuant to Provision 1 to qualified legal services projects and support centers to provide eviction defense, other tenant defense assistance in landlord-tenant rental disputes, or services to prevent foreclosure for homeowners, including pre-eviction and eviction legal services, counseling, advice and consultation, mediation, training, renter education, and representation, and legal services to improve habitability, increasing affordable housing, ensuring receipt of eligible income or benefits to improve housing stability, legal help for persons displaced because of domestic violence, and homelessness prevention. Of this amount, no more than 2.5 percent shall be available, upon order of the Department of Finance, for administrative costs of the Judicial Council and the State Bar. The remaining funds shall be allocated as follows:

(a) 75 percent shall be distributed to qualified legal services projects and support centers that currently provide eviction defense or other tenant defense assistance in landlord-tenant rental disputes, as set forth in this provision. To expedite the distribution of this percentage of the \$40,000,000 in Schedule (2), eligible programs shall be limited to those found eligible for 2021 Interest on Lawyer Trust Accounts (IOLTA) funding. Each eligible program shall receive a percentage equal to that legal services project's 2021 IOLTA allocation divided by the total 2021 IOLTA allocation for all legal services projects eligible for this funding, except that to ensure meaningful funding is provided, a minimum amount of \$50,000 shall be allocated to each eligible program unless the program requests a lesser amount, in which case the additional funds shall be distributed proportionally to the other qualified legal services projects. These funds shall be distributed as soon as practicable after the effective date of this act and shall not supplant existing resources.

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

3. Funds appropriated in Schedule (2) are available for encumbrance or expenditure until December 31, 2024.

4. The State Bar shall annually provide to the Judicial Council a report that includes funding allocations, annual expenditures, and program outcomes by service area, and service provider for all Equal Access Fund and federal funding. Data shall be reported using the established reporting framework in the Equal Access Program including applicable outcome measures reported in Legal Services standardized reporting, state level performance measures, and main benefits scores. The Judicial Council shall provide the report to the Department of Finance by January 1 of each year for the prior fiscal year.

**2021 State Bar of California Legal Aid Grants**

#	Vendor Organization	EAF-IOLTA
1	11054 Advancing Justice - Asian Law Caucus	\$ 203,020
2	10242 Affordable Housing Advocates	\$ 7,870
3	11114 Aids Legal Referral Panel **	\$ 21,400
4	11115 Alameda County Homeless Action Center	\$ 91,080
5	11235 Alliance for Children's Rights	\$ 314,050
6	11219 Asian Americans Advancing Justice- Los Angeles (formerly Advancing Justice)	\$ 473,350
7	11073 Asian Pacific Islander Legal Outreach	\$ 61,230
8	11041 Bay Area Legal Aid	\$ 322,260
9	10163 Bet Tzedek Legal Services	\$ 619,620
10	11097 California Advocates for Nursing Home Reform	\$ 143,149
11	11050 California Indian Legal Services	\$ 163,562
12	11087 California Rural Legal Assistance Foundation	\$ 143,149
13	11182 California Rural Legal Assistance, Inc.	\$ 1,471,398
14	11227 California Women's Law Center	\$ 143,149
15	11104 Capital Pro Bono Inc. (formerly Voluntary Legal Services Program of No Cal)	\$ 97,930
16	10249 Casa Cornelia Law Center	\$ 205,250
17	12336 Center for Gender and Refugee Studies - California	\$ 143,149
18	12328 Center for Human Rights and Constitutional Law	\$ 143,149
19	11042 Central California Legal Services	\$ 846,420
20	10162 Centro Legal de la Raza	\$ 174,590
21	11165 Chapman University Family Protection Clinic	\$ 19,510
22	11099 Child Care Law Center	\$ 143,149
23	10879 Coalition of California Welfare Rights Organizations	\$ 143,149
24	11172 Community Legal Aid SoCal	\$ 526,050
25	10149 Community Legal Services in East Palo Alto	\$ 134,570
26	12322 Contra Costa Senior Legal Services	\$ 20,580
27	10182 Dependency Advocacy Center	\$ 58,750
28	12329 Disability Rights California	\$ 2,037,673
29	11078 Disability Rights Education and Defense Fund	\$ 143,149
30	11198 Disability Rights Legal Center	\$ 173,891
31	11107 East Bay Community Law Center	\$ 105,850
32	11207 Elder Law & Advocacy	\$ 105,290
33	11143 Eviction Defense Collaborative	\$ 22,870
34	10970 Family Legal Assistance at CHOC Children's	\$ 13,778
35	12335 Family Violence Appellate Project	\$ 143,149
36	11070 Family Violence Law Center	\$ 15,280
37	12323 Greater Bakersfield Legal Assistance	\$ 342,960
38	12324 Harriett Buhai Center for Family Law	\$ 130,200
39	10113 Housing and Economic Rights Advocates	\$ 39,354
40	11096 Immigrant Legal Resource Center	\$ 143,149
41	11120 Impact Fund	\$ 143,149
42	11257 Inland Counties Legal Services	\$ 1,166,430
43	12325 Inland Empire Latino Lawyers Association, Inc. (formerly IELLA Legal Aid Project)	\$ 179,508

**2021 State Bar of California Legal Aid Grants**

#	Vendor Organization	EAF-IOLTA
44	11212 Inner City Law Center	\$ 424,540
45	11094 Justice & Diversity Center of the Bar Association of San Francisco	\$ 92,400
46	11206 Justice in Aging	\$ 143,149
47	12326 La Raza Centro Legal	\$ 29,170
48	11162 LACBA Counsel for Justice	\$ 57,300
49	10432 Law Foundation of Silicon Valley	\$ 193,660
50	11072 Lawyers' Committee for Civil Rights	\$ 184,310
51	10967 Learning Rights Law Center	\$ 102,100
52	11100 Legal Access Alameda	\$ 36,390
53	11083 Legal Aid at Work	\$ 308,473
54	11167 Legal Aid Foundation of Los Angeles	\$ 803,940
55	11175 Legal Aid Foundation of Santa Barbara County	\$ 67,840
56	11031 Legal Aid of Marin	\$ 37,740
57	10876 Legal Aid of Sonoma County	\$ 97,600
58	11173 Legal Aid Society of San Bernardino	\$ 151,730
59	11171 Legal Aid Society of San Diego	\$ 559,520
60	11033 Legal Aid Society of San Mateo County	\$ 56,210
61	11098 Legal Assistance for Seniors	\$ 18,070
62	11062 Legal Assistance to the Elderly	\$ 13,650
63	10428 Legal Services for Children	\$ 35,910
64	11108 Legal Services for Prisoners with Children	\$ 143,149
65	10920 Legal Services for Seniors	\$ 74,570
66	11030 Legal Services of Northern California	\$ 846,000
67	11189 Los Angeles Center for Law and Justice	\$ 85,060
68	11021 McGeorge Community Legal Services	\$ 83,140
69	11208 Mental Health Advocacy Services	\$ 47,470
70	11069 National Center for Youth Law	\$ 143,149
71	11203 National Health Law Program	\$ 143,149
72	11064 National Housing Law Project	\$ 143,149
73	11238 National Immigration Law Center	\$ 143,149
74	11181 Neighborhood Legal Services	\$ 649,210
75	11074 OneJustice **	\$ 143,149
76	11068 Prison Law Office	\$ 315,223
77	10159 Public Advocates Inc.	\$ 230,794
78	10160 Public Counsel	\$ 842,070
79	11133 Public Interest Law Project	\$ 143,149
80	11213 Public Law Center	\$ 459,480
81	11215 Riverside Legal Aid	\$ 136,279
82	10237 San Diego Volunteer Lawyer Program	\$ 174,140
83	12334 San Joaquin College of Law (formally New American Legal Clinic)	\$ 40,840
84	11202 San Luis Obispo Legal Assistance Foundation	\$ 22,060
85	11067 Santa Clara County Asian Law Alliance	\$ 50,620
86	12331 Santa Clara University Alexander Law Center	\$ 20,980

**2021 State Bar of California Legal Aid Grants**

#	Vendor Organization	EAF-IOLTA
87	10164 Senior Adults Legal Assistance	\$ 16,360
88	10395 Senior Advocacy Network	\$ 34,390
89	11058 Senior Citizens Legal Services	\$ 15,180
90	12613 Social Justice Collaborative	\$ 38,410
91	11157 UC Davis School of Law Legal Clinics	\$ 95,870
92	12619 UnCommon Law	\$ 77,350
93	12330 USD School of Law Legal Clinics	\$ 87,020
94	10394 Veterans Legal Institute	\$ 56,570
95	12332 Wage Justice Center	\$ 25,410
96	10133 Watsonville Law Center	\$ 43,780
97	11197 Western Center on Law and Poverty	\$ 143,149
98	11093 Worksafe, Inc.	\$ 143,149
99	11052 Youth Law Center	\$ 143,149
100	11066 Yuba-Sutter Legal Center for Seniors	\$ 10,200
<b>TOTALS</b>		<b>\$ 21,163,881</b>



The State Bar  
*of California*

OFFICE OF ACCESS & INCLUSION

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

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

Partnership Grants are competitive and discretionary. Project proposals must be submitted on SmartSimple by **5:00 p.m. on Thursday, March 18, 2021**.

If you have any questions, please contact Christal Bundang at [christal.bundang@calbar.ca.gov](mailto:christal.bundang@calbar.ca.gov).

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### BACKGROUND

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

Partnership Grants are awarded through a competitive process. The Commission reviews and compares all eligible proposals and makes funding recommendations to the Judicial Council. Grants are awarded for a one-year period commencing January 1. Decisions of the Commission, as approved by the Judicial Council, are final; there is no appeals process. Due to the limited availability of funding, all proposals may not be funded. Historically, projects have been funded in a range from \$20,000 to \$100,000. Grant award allocations also vary based on available funding. For the 2021 grant year, a total of \$2.42 million was awarded to 35 eligible projects.

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

## Partnership Grants: Requirements, Priorities, Policies

### Page 2

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

### **2022 PARTNERSHIP GRANTS SCORING RUBRIC**

In an effort to provide transparency and equity in the review process, the Committee will be using a new scoring rubric as a tool to help guide review of all eligible proposals. As this is the first time implementing a rubric for Partnership Grants, the Commission will revisit during the codification process and solicit feedback from applicants.

The rubric is comprised of four sections - Eligibility Requirements, Selection Criteria, Funding Priorities, and Innovation. Initial rubric scores will be shared with applicants, who will have an opportunity to improve their scores, by providing additional information or addressing initial concerns. Note that the Commission still maintains its discretion when determining funding recommendations.

#### **Eligibility Requirements**

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

- Qualified Legal Services Projects (QLSPs): Pursuant to Business & Professions Code 6210 et seq., only QLSPs are eligible to apply for Partnership Grants.
- Joint Court/Qualified Legal Services Projects: Proposals must be for projects jointly developed and implemented by California State courts and QLSPs, and, except in rare circumstances, services must be delivered at or near the courthouse.
- Indigent Persons: Use of Partnership Grant funds is restricted to the provision of services to indigent persons as defined under Business and Professions Code §6213(d).
- Self-Represented Civil Litigants: Partnership Grant funding is restricted to providing assistance to individuals who are or expect to be engaged in civil litigation without representation by counsel. These funds cannot be used to make court appearances on behalf of litigants.

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

#### **Selection Criteria (80 points)**

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

## Partnership Grants: Requirements, Priorities, Policies

Page 3

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

**Funding Priorities (20 points)**

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

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

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

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

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

## Partnership Grants: Requirements, Priorities, Policies

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and quantitative data on local needs or circumstances, and/or additional project evaluation such as court feedback, case file review or other such evaluative processes.

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

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

**Optional – Innovation (up to 10 points)**

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

Examples of innovation may include:

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

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

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

## Partnership Grants: Requirements, Priorities, Policies

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<b>Meets Expectations</b>	Response is good, effectively addressing most questions in the request for proposal and the selection criteria. Strengths and weaknesses are identified that may balance each other in significance. Overall quality of response is satisfactory
<b>Below Expectations</b>	Response is weak, neglecting to address questions in the request for proposal and the elements of the criteria. The responses identified weaknesses hold significant weight, overshadowing the identified strengths. Overall quality of response is inadequate, with significant flaws in key elements.

<b>SELECTION CRITERIA (80 PTS)</b>			
Checkmark the appropriate ranking for each category, and then multiply by the number below. Add sub-scores from A and B to get the total points for this section.			
<b>CATEGORY &amp; DESCRIPTION</b>	<b>Exceeds Expectations</b>	<b>Meets Expectations</b>	<b>Below Expectations</b>
<p><b><u>Court Involvement</u></b> A successful proposal will indicate:</p> <ul style="list-style-type: none"> <li>• significant cooperation between the partner court and legal services organization,</li> <li>• integration with other court-based services and</li> <li>• if the project's services are to be reserved for only one litigant role, such as petitioners but not respondents, that this has been thoroughly explored with the court, and alternate legal resources that can provide meaningful if not equivalent levels of assistance to the opposing parties have been identified.</li> </ul>			
<p><b><u>Project Impact</u></b> A successful proposal will clearly address the needs of the targeted population with meaningful and timely outcomes.</p>			
<b>A. Number of Check Marks</b>	<b>X20=</b>	<b>X15=</b>	<b>X10=</b>
<b>Subtotal (A)</b>			
<p><b><u>Administration</u></b> A successful proposal will have adequate:</p> <ul style="list-style-type: none"> <li>• staffing,</li> <li>• leadership, and</li> <li>• oversight of project monitoring, outreach and resource development.</li> </ul>			
<p><b><u>Project Budget</u></b> A successful project will clearly reflect how Partnership Grant funds are tied to actual project expenses or directly related costs.</p>			

## Partnership Grants: Requirements, Priorities, Policies

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<b>Continuity Planning</b> A successful project will adequately describe meaningful continuity planning efforts, such as pursuing other sources of funding, recruitment of volunteers, and in-kind support.			
<b>Evaluation</b> A successful proposal will incorporate meaningful evaluation plans and metrics that effectively demonstrate how the project's planned goals will be achieved.			
<b>B. Number of Check Marks</b>	<b>X10 =</b>	<b>X6 =</b>	<b>X3 =</b>
<b>Subtotal (B)</b>			
<b>Selection Criteria Total (A+B)</b>			

<b>FUNDING PRIORITIES (20 PTS)</b> Keeping the funding priorities in mind, determine the number points you wish to score this project and then multiply by the number below.	
<ol style="list-style-type: none"> <li>Partnership Grants will be awarded with the principal intention of providing seed funding for <u>new projects</u> and projects in their second to fifth year of funding.</li> <li>Projects requesting funding beyond their fifth year that serve rural areas, are responsive to a recent emergency or disaster, or are high-functioning and heavily utilized projects but have been unable to secure alternate funding despite documented efforts are prioritized.</li> <li>Projects seeking funding beyond a fifth year that are not in these priority areas are considered for funding only after proposed awards have been allocated for all prioritized projects. The State Bar retains discretion to waive this policy.</li> </ol>	5 4 3 2 1
<b>Funding Priority Total Score</b>	<b>X4 =</b>

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

## Partnership Grants: Requirements, Priorities, Policies

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**OTHER POLICIES REGARDING ADMINISTRATION OF PARTNERSHIP GRANTS**

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

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

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

**Overhead, Administration, and Audit (August 2018)**

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

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

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

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

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

## Partnership Grants: Requirements, Priorities, Policies

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

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

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

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

Attachment A5. Funding Recommendation and Summary of Proposals for 2022 Partnership Grants

Number	Organization	Project Title	County(ies) Served	Project Description	Funding Recommendation
1	Bet Tzedek Legal Services	Decedent's Estate Self-Help Clinic	Los Angeles	<p>In Los Angeles County, there is no free assistance for the heirs of people who were unable to complete an estate plan before their death to probate the estate. Probate is a time-consuming and expensive process, but one that—like conservatorship—lends itself to a self-help model. Decedent estate administration requires one to complete standard forms and meet statutory deadlines – things that can be overwhelming and challenging for those unfamiliar with the court system, but straightforward for trained advocates.</p> <p>Under this project, Bet Tzedek and the Los Angeles Superior Court seek to establish the County's only court-based Clinic providing free self-help services to pro per litigants in decedent estate matters. The project's goals are to increase access to self-help services in such matters and to improve the court's processes. Bet Tzedek staff attorneys and pro bono volunteers will triage decedent's estate cases referred by the courthouse and provide either legal information, self-help assistance, or referrals; help litigants determine if they need a full probate, summary probate procedure, or can use a probate alternative; and provide self-help assistance with out-of-court procedures for small estates and summary court procedures for transferring property. Litigants who need to probate a decedent's estate will be referred to the private bar. Bet Tzedek will also assess the need for clearing probate notes for litigants who have filed pro per probate petitions and determine if and how to assist. With the court, the Clinic will continually assess community need for other probate-related procedures and develop practicable self-help services.</p>	\$120,000
2	Bet Tzedek Legal Services	Remote Pro Se Technology Initiative	Los Angeles	<p>Faced with the unexpected challenges of the COVID-19 pandemic, Bet Tzedek's Self-Help Conservatorship Clinic (SHCC) and Elder Abuse Restraining (EARO) Clinic transformed their best practices, court-based clinics to a fully remote model virtually overnight. This experience proved that fully remote pro se assistance is not only possible, but done right, can significantly expand access for everyone, even after the pandemic has ended.</p> <p>Bet Tzedek and the Los Angeles Superior Court (LASC) are joining forces to launch the Remote Pro Se Technology Initiative to improve and expand remote infrastructure created during the pandemic to further increase access to justice for litigants seeking elder abuse restraining orders and conservatorships in Los Angeles County. Program components include continuing remote SHCC and EARO Clinic services, developing online video tutorials to complement remote aid, coordinating with LASC to improve court technologies that support remote assistance, conducting outreach to publicize remote services, and launching remote EARO kiosk intake at Stanley Mosk. This initiative will not only increase access to justice at the nation's largest county court but will provide a model for effective remote services throughout California.</p> <p>The Remote Pro Se Technology Initiative will be staffed by SHCC and EARO Clinic staff. In addition, a Pro Se Clinic Coordinator will be hired to bridge both clinics, providing intake and follow-up services. Remote SHCC assistance will be available Monday-Friday from 9:00am-5:00pm. Remote EARO Clinic assistance will be available Monday, Wednesday, and Friday from 9:00am-5:00pm.</p>	\$120,000

Attachment A5. Funding Recommendation and Summary of Proposals for 2022 Partnership Grants

3	California Rural Legal Assistance, Inc.	San Joaquin Housing Helpline Court Clinic Partnership	San Joaquin	<p>California Rural Legal Assistance’s San Joaquin Housing Helpline will provide one-on-one legal advice and/or information to San Joaquin tenants with housing concerns, focusing on housing retention and prevention of homelessness. In addition to individual phone consultations with tenants, Helpline staff will offer weekly answer and trial preparation clinics, available to all San Joaquin tenants and landlords. Although most services will be delivered virtually through phone and Zoom, we will offer weekly clinics in person at CRLA’s Stockton office located across the street from the court. Helpline staff will be available to meet in person with tenants with disability-based needs to access services. Participants can elect to attend the group clinics in person or via Zoom link. San Joaquin tenants not eligible for CRLA services will be given legal information, know your rights (KYR) print and video resources in multiple languages, referrals, and access to our weekly clinics. Landlords will be offered information, KYR resources, access to our clinics, and referral back to the San Joaquin Court Self-Help Center and the San Joaquin Bar Association Lawyer Referral Service for additional assistance. Providing services via phone and Zoom provides greater access to clients with disabilities, health concerns during COVID-19 and beyond, and transportation barriers to accessing services located in a brick and mortar office or courthouse. The CRLA San Joaquin Housing Helpline will be open Monday, Wednesday, and Fridays from 9:00 am to 12:00 pm and 1:00 pm to 4:00 p.m. Answer and trial preparation clinics will be held once a week.</p>	\$120,000
4	Central California Legal Services	Guardianship Project	Fresno	<p>This project enjoys a successful record of assisting eligible self-represented litigants obtain guardianships for minor children, many placed with family or referred by Child Protective Services. COVID closures disrupted services during 2020; both parties anticipate that, by 2022, the project will be operational. Staff from the Fresno Superior Court Probate Division, the Fresno County Public Law Library, and CCLS will participate in twice-monthly workshops presented on the first and third Friday mornings; however, as the format of the workshops remains fluid due to COVID-19 social-distancing and gathering-size restrictions, the Court cannot commit at this time to in-person workshops.</p> <p>During the workshops, the forms are explained to participants as they follow along on their own forms, filling in the required information and/or taking notes to complete the forms at a later time. This allows the presentations to proceed within the workshop’s timeframe, leaving sufficient time to respond to questions litigants may have. Once the forms are completed, litigants may contact CCLS and/or Probate Court staff for final review prior to submitting the forms to the Court for filing. This further ensures the forms are properly completed. The project serves all parties; however, those opposing a guardianship rarely attend or inquire about services.</p> <p>The Court supports the partnership and values the direct benefit provided for those navigating the Guardianship process. Participants accurately complete and timely file their documents, saving money and frustration. Court staff is engaged throughout this process; they see the direct time-saving benefit it provides.</p>	\$41,000

Attachment A5. Funding Recommendation and Summary of Proposals for 2022 Partnership Grants

5	Central California Legal Services	Tenant/Landlord Housing Law Project	Fresno	<p>In partnership with the Fresno County Superior Court, CCLS’s Project has for years successfully provided legal information and self-help assistance to unrepresented litigants in Unlawful Detainer (UD) matters. COVID closures disrupted services during 2020; the Court and CCLS anticipate that, by 2022, the project will be operational.</p> <p>Litigants are screened for eligibility before receiving assistance. Self-represented litigants—tenants and landlords—obtain assistance with completing required Judicial Council forms; legal information about tenant/landlord rights and responsibilities, the UD process, and preparing for trial; and referrals to social service providers.</p> <p>In the past, the project provided four weekly sessions on Tuesday and Thursday, mornings and afternoons, at the Sisk Courthouse; however, as the format of the sessions remains fluid due to COVID-19, the Court cannot commit to in-person workshops. The Thursday afternoon session focuses on trial preparation and is open to all parties scheduled for trial. Information packets on rights and responsibilities are updated for distribution at the clinic, online, and with community partners. When litigants are educated about the eviction process, the required “pro per” legal paperwork is more accurate, and litigants are in a better position to self-advocate during settlement and at trial.</p> <p>The project has expanded access to the courts, providing self-represented litigants with information giving them a better understanding of the UD process, its requirements, short timeframes, and available resources. The project has supported the Court’s neutral role, providing all parties access to legal information and assistance; however, during the pandemic, these sessions have been suspended, although there are forms available on the Court’s website.</p>	\$60,000
6	Central California Legal Services	Tulare County Unlawful Detainer Workshop	Tulare	<p>The project is designed to offer trial preparation workshops to eligible self-represented litigants who have a scheduled court hearing for their eviction related matter. In 2020, CCLS was unable to implement this newly funded project due to COVID 19 and staffing challenges. The project will assist litigants achieve fairer outcomes, saving court personnel and judicial officers significant time otherwise expended in refereeing proceedings in which novice pro per litigants attempt to navigate the unlawful detainer (UD) process.</p> <p>The proposed services, in partnership with the Self-Help Center (SHC), bolster the assistance SHC provides to litigants (both tenants and landlords) in UD. With support from SHC staff, the project attorney and paralegal will assist eligible litigants who are referred to the trial preparation workshops when litigants request a hearing and/or are scheduled for trial.</p> <p>Six trial preparation sessions will take place monthly, four at the Porterville courthouse and two at the SHC (Visalia). Workshops are designed to prepare litigants for their UD trials. Litigants will be taught how to successfully present their cases, including proffering demonstrative evidence, eliciting witness testimony, and cross-examination basics. Litigants will receive training in how to make best use of the Court’s mediation process, the precursor to every UD trial in Tulare County.</p> <p>Both SHC and CCLS are anxious to launch the project, and have been in communication with court staff. In the interim, the SHC continues to refer litigants to the CCLS Legal Assistance and Referral Line (LAL) for appropriate legal assistance.</p>	\$70,000

Attachment A5. Funding Recommendation and Summary of Proposals for 2022 Partnership Grants

7	Community Legal Aid SoCal	Compton Self-Help Economic Expansion Project	Los Angeles	<p>The Compton Self-Help Center Economic Expansion Project (EEP) would expand capacity for consumer debt issues and small claims issues at the Compton Superior Courthouse Self-Help Center (SHC). As COVID-19 protections expire, we anticipate a flood of cases concerning these economic issues over the next several years. One area of particular concern is the impact to the LA Court’s Small Claims system once it is opened for back rent claims on August 1, 2021.</p> <p>The EEP seeks to help the Court weather the crisis by educating self-represented litigants about the small claims and consumer debt processes. It is a critical service for the Compton Courthouse, which serves communities that are home to significant economic and health disparities that have been worsened by COVID. As a result, there will be an increase in local residents who must engage with the civil legal system through collections and small claims cases.</p> <p>With a 1.0 FTE Attorney, this project would allow Legal Aid staff to consult with, and/or provide educational workshops to, self-represented litigants who are at the Compton Courthouse or who are being helped remotely. Primary goals are to help litigants understand the legal process, and correctly complete and submit documents. Litigants who would benefit from additional services, would be referred to the County of Los Angeles’ Department of Consumer and Business Affairs (DCBA) or Legal Aid.</p>	\$92,000
8	Community Legal Aid SoCal	Orange County Consumer Debt Workshop/Clinic	Orange	<p>Community Legal Aid SoCal (formerly the Legal Aid Society of Orange County) began a partnership with the Orange County Superior Court in 2019 to conduct a Consumer Debt workshop at the Central Justice Center in Santa Ana. The objective of this program is to make the debt collection legal process more accessible and comprehensible to pro per litigants and guide them through this process no matter the stage they seek assistance.</p> <p>The project assists a range of pro per litigants, from those who are at the earliest stage of a debt collection matter (such as the receipt of a letter demanding payment on a defaulted debt) to litigants who have been served with a collection lawsuit. The project is also useful for litigants who are subject to collection/enforcement activities following entry of a debt collection judgment. All services are free.</p> <p>In 2022, this project will include 1 one-on-one clinic per month where eligible litigants can receive counsel and advice and 2 information-only workshops that are available to all litigants. The project is staffed by an attorney and a bilingual paralegal. While the project is open to both debtors and creditors, it is designed to help low-income litigants who are opposed by a party represented by counsel. In this way, the Consumer Debt Project increases the community's access to the justice system and will help bridge the gap of unmet needs of low-income individuals and families.</p>	\$23,000

Attachment A5. Funding Recommendation and Summary of Proposals for 2022 Partnership Grants

9	Community Legal Aid SoCal	Unlawful Detainer Workshop - Norwalk Courthouse	Los Angeles	<p>Without some sort of legal assistance, families face dire outcomes from eviction cases. Many litigants have insufficient information about the UD process and laws affecting their rights, especially as they change in response to COVID-19. Unable to present or defend their case effectively, self-represented litigants often are denied equal access to the justice system. For tenants, this can result in serious consequences for themselves and their families: not only can they be removed from their homes, but a judgement on their record can make it difficult for them to obtain housing for years to come. Unrepresented landlords may be unable to evict dangerous or destructive tenants.</p> <p>Community Legal Aid SoCal (CLA SoCal) seeks to serve growing numbers of pro per tenants and landlords with UD matters in LA County. This project will increase the community's access to the justice system and help bridge the gap of unmet needs of low-income individuals by offering a much-needed service to assist pro per litigants at a convenient location. We will continue to offer the workshops three times each week (twice for tenants and once for landlords) in order to provide timely assistance to pro per litigants seeking to file required Unlawful Detainer court documents and other pleadings with the court.</p> <p>Staffed by an attorney and paralegal, the workshops will provide pro per litigants an overview of the eviction process and assistance in completing appropriate forms. Referrals to other organizations and agencies will be made as appropriate. The workshops serve both landlords and tenants.</p>	\$60,000
10	Elder Law & Advocacy	Imperial County Unlawful Detainer Clinic	Imperial	<p>The Imperial County Unlawful Detainer Clinic (ICUD) is designed to serve older adult and low-income self-represented unlawful detainer litigants, including those who are limited or non-English speakers, and offer services at the central Imperial County Superior Court. The goal for each participant is that they will be sufficiently educated about relevant aspects of their unlawful detainer matter, and sufficiently prepared for court processes, to successfully address their case.</p> <p>Post-pandemic, the courthouse-based clinics, staffed by two attorneys and two assistants, will be held Tuesday mornings from 8:30am-11:30am, and Wednesday afternoons from 1:00pm-4:00pm. Participants will receive an overview of the unlawful detainer process, direct assistance with filling in their forms and organizing evidence, and their procedural questions will be answered.</p> <p>Elder Law &amp; Advocacy (EL&amp;A) and California Rural Legal Assistance, Inc. (CRLA) will continue to work together to serve residents of this geographically large, diverse, and underserved county. Meetings between EL&amp;A, CRLA and the Court will consist of in-depth discussions of matters concerning ongoing clinic operations and will result in changes where indicated.</p> <p>The project has been, and continues to be, an effective and efficient model for providing services. The Court experiences more prepared self-represented litigants, and the low-income mono- and bilingual community benefits by having a free legal resource in a county where few legal resources are available. Project staff remain tirelessly committed to helping participants with their critical housing issues and look forward to continuing their work in 2022.</p>	\$74,000

Attachment A5. Funding Recommendation and Summary of Proposals for 2022 Partnership Grants

11	Family Violence Law Center	Domestic Violence Pro Per (DVPP) Project	Alameda	<p>The Domestic Violence Pro Per (DVPP) Project is a collaborative project of Family Violence Law Center (FVLC), Legal Access Alameda (LAA, formerly Volunteer Legal Services Corporation of the Alameda County Bar Association (VLSC)), and the Self-Help Center of the Superior Court of California, County of Alameda (SHC). The DVPP project aims to increase access to legal services for pro per litigants in South Alameda County by serving self-represented litigants from across South Alameda County in Domestic Violence Prevention Act restraining orders via services offered at the Hayward Hall of Justice. Project partners will meet the needs of self-represented litigants, including those with limited English proficiency, in domestic violence and family law matters by implementing the following objectives: 1) FVLC, LAA and SHC will hold a joint weekly (currently Mondays, 1:30-4:30) Domestic Violence Petitioner Clinic for DVPA petitioners at the Hayward Hall of Justice (or virtually if required for public health reasons), staffed by a FVLC attorney, FVLC pro bono attorneys and law clerks, SHC staff and volunteers, and/or LAA pro bono attorneys; 2) SHC will continue to provide assistance to both DVPA respondents and petitioners, and LAA will continue to provide assistance through an existing LAA family law clinic; and 3) LAA and FVLC will continue to accept referrals from SHC and the clinics for legal representation as resources allow.</p>	\$21,000
12	Inland Counties Legal Services	Consumer Rights Clinic	San Bernardino	<p>The Consumer Rights Clinic (CRC) is a partnership between Inland Counties Legal Services (“ICLS”) and the San Bernardino Superior Court to provide legal assistance to unrepresented indigent consumers with debt collection lawsuits. The project started in January 2021 and this application seeks funding for a second year. The project will fund an attorney, a paralegal, a legal secretary. This project will build upon an app created under a prior grant that will allow consumers to prepare a response, propound discovery, and send a settlement letter to opposing counsel. Documents produced by the app will be reviewed by an attorney.</p> <p>Post COVID restrictions the court will provide space for ICLS to operate and make referrals to the Clinic. Project staff will be in the courthouse on a regular schedule to help defendants prepare responsive pleadings and settlement offers. Staff will attempt to settle/dismiss cases as soon as possible.</p> <p>ICLS will work with the court and local bar associations to promote volunteer attorney involvement to resolve eligible cases. The ICLS attorney will not represent the client on the record and will not appear in court on behalf of the client. Through counsel and advice and document preparation, the goals are to increase access to justice for clients and alleviate the demand of these cases on the court’s time by resolving them expeditiously.</p>	\$88,000

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<p><b>13</b></p>	<p>Justice &amp; Diversity Center of the Bar Association of San Francisco</p>	<p>Shriver - SASH Self-Help</p>	<p>San Francisco</p>	<p>The Justice &amp; Diversity Center’s (JDC) Sargent Shriver Custody Project (SASH) received primary funding from the Judicial Council of California from October 2011 through 2017, before Judicial Council funding was reduced sharply due to budget cuts. To partially alleviate this funding cut, JDC’s SASH program received Partnership Grant support at the start of 2018. These two funding sources now both support the SASH project, with Partnership Grant funding supporting only the SASH Self-Help components of the project.</p> <p>JDC’s overall SASH Project provides legal information, legal representation, and social services to litigants involved in child custody and visitation disputes. This Partnership Grant will support legal information services provided to indigent Self-Represented Litigants (SRLs) at the San Francisco Superior Court’s ACCESS Center through the Self-Help component of JDC’s SASH Project. Partnership Grant funds will not support legal representation or court appearances on behalf of litigants.</p> <p>The bilingual (English/Spanish) SASH Self-Help Attorney provides information and assistance to low-income SRLs filing paperwork for child custody and visitation matters, as well as facilitates settlement efforts. Litigants served by the SASH Self-Help Attorney have incomes at or below 200% of the federal poverty level. ACCESS Center customers who have custody issues and are income-eligible are routed to the SASH Self-Help Attorney. The SASH Self-Help Attorney provides assistance and information with custody and visitation issues. The customer is then referred for SASH Legal Representation services if the opposing party is represented and one of the litigants is requesting sole physical or legal custody. These direct legal representation services are supported by other funds.</p>	<p>\$36,000</p>
<p><b>14</b></p>	<p>LACBA Counsel for Justice</p>	<p>LACBA-Domestic Violence Legal Services Project</p>	<p>Los Angeles</p>	<p>LACBA Domestic Violence Legal Services Project (DVP) has partnered with the Los Angeles Superior Court for over 35 years to provide legal assistance to victims of domestic violence and elder abuse. With a small staff of 4, and over 100 volunteers (attorneys, law students, paralegals, and interpreters), the DVP serves thousands of victims of violence annually and assists them with the preparation of requests for Temporary Restraining Orders. The demand for assistance grows each year, and during the current pandemic the need is even greater. By continuing to partner with the Superior Court, and with Partnership funding, the DVP will be able to increase the ability to effectively and efficiently handle the requests for assistance.</p> <p>The Project operates out of a converted courtroom in the Stanley Mosk Courthouse as well as an office in the Central Bureau-Family Justice Center(FJC). The FJC is located only 10 minutes away from the Courthouse, allowing for a quick transition during the current pandemic, and providing ease for litigants to continue to receive services during the court closure.</p>	<p>\$80,000</p>

Attachment A5. Funding Recommendation and Summary of Proposals for 2022 Partnership Grants

15	Legal Access Alameda	Family Law Day of Court	Alameda	<p>Legal Access Alameda’s Family Law Day of Court Clinic (FLDOC) is an in-court clinic where volunteers take referrals directly from the bench on the Family Law Pro Per Request for Order (RFO) calendars. In Alameda County, self-represented litigants (SRLs) are generally assigned a specific day on each Family Law Department’s calendar. Each clinic is staffed by a supervisor, either the FLDOC Supervising Attorney or a Self-Help staff person, and one to three volunteers. Volunteers and clinic staff work closely with judicial officers and courtroom personnel. The clinic seeks to assist all SRLs whose cases are set on the RFO calendar and who appear for their hearing. The hearings are short-cause hearings that are generally for child custody, visitation, and support.</p> <p>FLDOC provides assistance to the six non-DCSS family law departments at the Hayward Hall of Justice on their pro per RFO calendars. These calendars may occur in the morning or afternoon, several times per week. During the Covid-19 pandemic, the FLDOC clinic has provided services remotely via video conference and will do so in 2022 if necessary.</p> <p>The primary goal of the clinic is for SRLs to leave court with a signed, clear, and enforceable order in hand. Clinic staff and volunteers draft the orders immediately after the hearing, and submit proposed orders for the judge’s signature and filing by the court clerk. FLDOC also assist SRLs by clarifying the newly-issued orders, explaining legal terms and court procedures, completing necessary paperwork, and running child and temporary spousal support calculations.</p>	\$25,000
16	Legal Access Alameda	Family Law Settlement Conference	Alameda	<p>The Family Law Status Conference Clinic (“FLSC Clinic”) offers assistance to litigants appearing on Self-Represented Litigant Family Law Status Conference calendars in a family law department. This program brings a Legal Access staff attorney (the FLSC Attorney) on-site to provide expanded services to litigants and oversight of volunteer attorneys.</p> <p>The FLSC clinic assists with Dissolution, Legal Separation, Nullity, and Parentage cases. Clinic staff (the FLSC attorney and Self-Help staff) and volunteers help litigants understand case procedure and complete or correct necessary forms, with the ultimate goal of assisting litigants in moving their cases to a final resolution, either by completing a judgment or referring the case for trial setting. This helps the court with the status conference compliance requirement under California Rule of Court 5.83(c)(2) and facilitates more efficient support to litigants with on the spot assistance and by identifying issues early on in the process.</p> <p>Before CoVid19, the FLSC clinic occurred Tuesday and Thursday afternoons, and some Friday mornings, providing all services in person. In 2020 the FLSC department started holding virtual hearings via BlueJeans video conference and consolidated all FLSC clinic cases to Tuesdays. The FLSC clinic provided all services remotely and clinic staff send litigants required forms via email and mail. While remote, the FLSC Attorney also sends letters to litigants before each clinic, which include description of how to complete the next step, required forms with highlights and current filing instructions. If necessary in 2022, Legal Access will continue to operate the FLSC clinic remotely.</p>	\$61,000
17	Legal Aid Foundation of Los Angeles	2022 - Torrance Self-Help Center	Los Angeles, Orange	<p>Legal Aid Foundation of Los Angeles (LAFLA) is applying for continuation funding to supplement the staffing of the Self-Help Legal Access Center in the Torrance Courthouse, to provide expanded services in Family Law and Protective Restraining Order cases. LAFLA staff are currently working offsite providing remote services, including for referrals from the Court’s self-help phoneline, but the grant application for 2022 includes flexibility to continue providing services remotely and phase in some return of onsite services in space allocated by the Court at the Torrance Courthouse when a timeline is by mutually agreed upon by the Court and LAFLA.</p>	\$84,000

Attachment A5. Funding Recommendation and Summary of Proposals for 2022 Partnership Grants

18	Legal Aid Foundation of Santa Barbara County	Legal Resource Center Partnership	Santa Barbara	<p>LAFSBC proposes to continue Partnership funding for a self-help attorney for the civil Legal Resource Centers (LRC) and a part-time assistant. Until the hiring of a 3rd LRC attorney with Partnership funds in 2020, the staffing level of the Legal Resource Centers had not increased for at least 15 years. The increase in staffing allowed us to provide LRC services in Santa Barbara and Santa Maria 5 days per week, and 2 days per week in Lompoc. In calendar year 2020, the LRCs countywide served over 7,000 self-represented litigants in civil matters. Based on learnings from providing remote services due to the pandemic, we propose that the LRC partnership attorney will work 1 day per week in person at the Lompoc courthouse. On the remaining days, the bilingual LRC Partnership attorney will assist SRLs countywide by phone, email, or videoconference, with a focus on mid and south county residents. The LRC assistant will provide in-person bilingual support to the LRC at the Santa Barbara courthouse and other data entry assistance. The other two attorneys, funded separately, will cover in-person services Santa Barbara and Santa Maria. We believe that by providing a combination of remote and in-person services, we will best meet the needs of residents across the 75 mile length of our county.</p>	\$115,000
19	Legal Aid of Marin	Homelessness Prevention through Mandatory Settlement Conferences	Marin	<p>Established in 2012, the Marin Superior Court Unlawful Detainer Settlement Conference Program is recognized by the Judicial Council as an innovative, efficient and effective trial court program for unlawful detainers (<a href="https://www.courts.ca.gov/27438.htm">https://www.courts.ca.gov/27438.htm</a>). Before physical access to courts was limited by COVID, Marin Superior Court and Legal Aid of Marin collaborated to offer Conferences in the week before trial for all unlawful detainer cases. The Court provides general oversight, and Legal Aid of Marin staff and Pro Bono volunteers recruited and trained by Legal Aid of Marin staff meet with unrepresented parties in each case (both landlords and tenants) and attempt to resolve them. When the parties are successful, they draft settlement agreements, signed by both parties, and present them to the Court. In 2021 to date, over 85% of cases reached agreements - a measure of the program's effectiveness. Agreements include tenancy preservation, case dismissal, rent forgiveness, and time to relocate. Even when tenants move, time and funds with which to do, together with avoidance of an eviction judgment, go far to prevent homelessness.</p> <p>During the COVID pandemic to date, unlawful detainer trials have significantly curtailed. The Partnership Grant affords Marin Superior Court and Legal Aid of Marin the opportunity to adapt this innovative, effective program to the COVID and post-COVID environment. The partners will employ alternative technologies to facilitate settlement conferences, and model protocols that take into account new local and state legal protections that emerge in response to the COVID pandemic and its aftermath.</p>	\$80,000

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20	Legal Aid Society of San Bernardino	Caregivers and Small Estates Accessing Justice	San Bernardino	<p>Legal Aid Society of San Bernardino (LASSB) will provide direct legal services on Small Estates, Conservatorship and Guardianship. LASSB will use grant funds to assist parties with small estate matters to reduce the stress on the court, assist with conservatorship to ensure that a loved one's personal finances and healthcare issues are properly handled and guardianship which will ensure a loved one who is unable to care for his or her physical or financial health is cared for.</p> <p>LASSB will identify appropriate cases referred by the court, developed in-house or obtained through outside marketing efforts, for either document preparation, general information, or a combination of both efforts to resolve the issues as efficiently as possible. The court will also send over cases over with specific instructions on document preparation. The assistance will be limited to document preparation and general information. The project will not include legal advice. The purpose of general information is to avoid establishing an attorney client relationship which allows LASSB to assist all qualifying court patrons.</p> <p>General information will consist of legal aspects, clarification of terms or conditions, and instructions to prepare augmented, corrected, or missing pleadings for the litigant. LASSB will provide procedural assistance to facilitate immediate filing and processing of their casework.</p> <p>LASSB services will be provided Mon-Thur 9AM-12:30PM and 1:30pm-4pm. The collaboration will eliminate procedural barriers, prevent unnecessary delays, and assist the court in reducing the backlog. In a post-COVID-19 world, the project will eliminate the need for multiple court visits, reduce confusion and stress.</p>	\$85,000
21	Legal Aid Society of San Diego	Name Change & Gender Marker Change Self-Help Clinic	San Diego	<p>In partnership with the San Diego Superior Court, LASSD seeks funding to operate the Name Change &amp; Gender Change Self-Help Clinic in 2022. This project fills a gap in San Diego County self-help services, as there are no court-based projects providing services related to this substantive legal area. The aim of the project is to help indigent, self-represented litigants to fully participate in the legal system when in need of a name and/or gender marker change by providing facilitator-like one-on-one assistance to participants, including document preparation and information on the court process. Providing services to self-represented litigants in this area will not only help and educate the litigant but will also help the court by cutting down clerk and court time spent on litigants navigating the court process without assistance. The advent of the Real ID in California has increased the need for assistance with Name Changes. People are discovering that not all their documents match and need assistance obtaining a decree of name change in order to obtain the Real ID.</p>	\$75,000
22	Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion Project	San Diego	<p>LASSD seeks funding for a fifth year of operation of the Unlawful Detainer Expansion Project in 2022. LASSD is requesting funding to continue to provide services to indigent, self-represented litigants who need assistance in connection with an Unlawful Detainer action at the Hall of Justice, the central division of the San Diego Superior Court. This vital project is necessary to meet the ever increasing demand for self-help UD services. The Project also serves a very important function for the Shriver Housing Project, providing daily, walk-in, emergency one-on-one assistance to both plaintiffs and defendants. This project assists that team by allowing their staff to be litigation centered and accept clients who have filed their initial documents. The goal of the UD Clinic Expansion Project remains the same in the fifth year, namely to provide quality, self-help UD services to indigent residents who reside in San Diego's North County, East, South and Central San Diego regions.</p>	\$72,574

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23	Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	Alameda	<p>The Partnership to Assist Guardianship Litigants is a collaborative effort of Legal Assistance for Seniors (LAS), Legal Access Alameda of the Alameda County Bar Association (LAA) and the Alameda County Superior Court. The Partnership will provide legal assistance to low income, pro per litigants in guardianship cases. Partners will assist with all aspects of these cases including temporary petitions, general petitions, objections, adding or removing co-guardians, petitions for visitation and petitions for termination. The partners will develop sample documents and instructions designed to fill in any potential gaps caused by the reduction in court services, including reduced filing hours and the elimination of Probate Examiner phone hours. The Partnership will hold weekly workshops to assist with filing requirements. One of the weekly workshops will be dedicated to the complex notice requirements that often result in continuances for the litigants. We will also incorporate lessons learned during covid and may provide remote assistance. LAA volunteers and LAS will provide day of court assistance twice a month when the pro per cases are calendared. The day of court assistance includes explaining the procedural deficiencies keeping the cases from being heard, providing forms allowing the litigants to draft declarations to address the procedural issues and assisting with filing documents. The goal of this program is to navigate litigants through the complex procedural process required in guardianship cases, providing low income litigants access to justice while also reducing continuances and preserving court resources.</p>	\$48,000
24	Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	Alameda	<p>The Partnership to Assist Limited Conservatorships Litigants is a collaborative effort of Legal Assistance for Seniors (LAS), Legal Access Alameda of the Alameda County Bar Association (LAA) and the Alameda County Superior Court. The Partnership will provide legal assistance to low income, pro per litigants in limited conservatorship cases. Limited conservatorship cases have complex procedural requirements that are often daunting to pro per litigants who are typically more focused on providing and coordinating the care needed for their loved one. Many of the litigants in Alameda County do not speak English and have trouble navigating the legal system, which can lead to delays in their ability to provide adequate care. This Project allows the Partners to meet a currently unmet need in Alameda County. Partners will assist with temporary petitions, general petitions, objections and orders after hearing. The partners will develop new sample documents and instructions designed to assist litigants with local rules and the complicated procedural process. The litigants will be assisted at weekly workshops with one workshop a month dedicated to the complex notice requirements in these matters. Virtual assistance and one-on-one assistance will also be provided as needed. LAA volunteers and LAS staff will assist litigants on pro per day of court as well. The goal of the partnership is for the partners to use their experience assisting pro per litigants navigate with the complex procedural requirements of limited conservatorship cases and to avoid multiple continuances that take up court resources.</p>	\$60,000

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25	Legal Services of Northern California	Yolo Consumer Clinic	Yolo	<p>Legal Services of Northern California’s Yolo County office (LSNC) and the Yolo County Superior Court propose to provide free legal assistance to low-income persons in consumer law cases at the Court’s Self Help Center. Targeted at the 48,465 Yolo County residents living below 125 percent of the federal poverty level, the project will concentrate on consumer law because of the expected rise in consumer lawsuits stemming from the economic fallout caused by the pandemic. Low-income litigants with language, literacy, or technology barriers in this rural region need legal assistance in consumer cases because they have difficulty accessing the court and have been hardest hit by the economic crisis caused by the pandemic. 22.2 percent of the county’s population speak only Spanish, 37.1 percent speak English less than “very well,” and 15.9 percent lack basic literacy skills. 1,255 low-income persons reside in the rural regions with limited internet services. The project will be unique to the region.</p> <p>Two bilingual project attorneys, who will share a 51 percent full time equivalent position, will staff the project by providing twice-a-week private consultations in consumer law, weekly workshops covering consumer debt and the lawsuit process, and weekly mediation during the small claims court calendar, with a focus on pandemic rental debt cases. The project will assist with the anticipated unmet need for pro per legal assistance in consumer law cases, reduce court clerk time spent with self-represented litigants, promote judicial economy, and ensure that self-represented litigants have equal access to the court.</p>	\$67,000
26	Neighborhood Legal Services	CHATSWORTH CONSUMER TECHNOLOGY PARTNERSHIP GRANT	Los Angeles	<p>NLSLA proposes to continue partnership with Los Angeles Superior Court (LASC) to maintain and enhance the Consumer Technology Project in its Chatsworth Consumer Clinic. The project leverages technology to develop online consumer debt services which will increase access to legal information and services for self-represented litigants with consumer matters and decrease the burden of travel time and costs for litigants. By leveraging technology to educate self-represented litigants about the legal processes related to consumer debt collection or relief, litigants are able to make an informed decision and begin initial steps before their an in-person appointment at the Center. NLSLA seeks funding to 1) develop additional online self-help resources for Consumer Debt matters, 2) continue the development of videos and remote workshops to educate litigants about an array of consumer legal matters, and 3) enhance the document assembly project’s capacity to produce an Answer to a consumer lawsuit for a self-represented litigant. While the project proposes to continue remote services to litigants, NLSLA and LASC anticipate a phasing in of in-person services at the Chatsworth Self-Help Legal Access Center located at the Chatsworth Courthouse in 2021.</p>	\$90,000

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27	Neighborhood Legal Services	PASADENA CONTINUUM OF SERVICES	Los Angeles	<p>Neighborhood Legal Services of Los Angeles, (NLSLA), is applying for funding to continue its partnership with Los Angeles Superior Court (LASC) to provide self-help services to litigants served by the Pasadena Courthouse. The Pasadena Continuum of Services project will assist with Unlawful Detainer (UD) Answers and serve as a triage on cases that should be place on the continuum of services for the San Gabriel Valley. The legal process for UD's operates on tight deadlines prescribed by law and requires that self-help assistance be available so that self-represented litigants are able to promptly get the help they need and avoid losing any legal rights. As neither City nor County funding for legal assistance with UD's prioritized coverage of this area, the UD self-help services provided through this project will be essential for litigants in surrounding community.</p> <p>The Pasadena Continuum of Services project will allow NLSLA to continue to house a bilingual attorney to provide high quality, competent, and culturally sensitive services to Self-Represented Litigants in Unlawful Detainer matters. While the partners anticipate reestablishment of in-person operations in 2021, the project will continue to integrate remote operations into its service delivery model.</p>	\$81,000
28	Neighborhood Legal Services	STABILIZING FAMILIES PARTNERSHIP GRANT	Los Angeles	<p>Neighborhood Legal Services of Los Angeles (NLSLA) seeks funding to continue its partnership with Los Angeles Superior Court (LASC) to support self-represented litigants in Probate Guardianship through its project "Stabilizing Families". The project supplements guardianship self-help services provided by Public Counsel at the Stanley Mosk Courthouse by allowing an NLSLA attorney to focus in the service areas of the Van Nuys and the Antelope Valley courthouses to assist self-represented litigants petitioning the Court for guardianship. The project will help litigants understand and navigate the complex processes and forms related to Probate Guardianship. In addition, the project aims to develop an array of tools and materials to educate the public on the issue of guardianship. This collaborative partnership will help self-represented litigants in Probate Guardianship achieve stability for their families. While the project proposes to continue remote services to litigants, NLSLA and LASC anticipate a phasing in of in-person services at the NLSLA Self-Help Legal Access Center located at the Michael D. Antonovich Antelope Valley Courthouse in 2021.</p>	\$100,000

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29	Public Counsel	Guardianship Clinic	Los Angeles	<p>Established in 2001, Public Counsel’s Pro Per Guardianship Clinic provides legal information, pro per assistance, and referrals to pro per litigants from throughout LA County who are seeking guardianships or other actions in the probate court. The Clinic assists over 1,900 individuals annually by providing:</p> <ul style="list-style-type: none"> <li>* Information about guardianships and other probate issues;</li> <li>* Screening to ensure that the litigant’s legal matter is appropriate for filing in probate court;</li> <li>* Access to comprehensive needs assessments to identify any additional issues, followed by appropriate referrals;</li> <li>* Assistance in preparing pleadings; and</li> <li>* User-friendly guides in English and Spanish to assist litigants with guardianship proceedings, including form pleadings, filing instructions, notice requirements, and advice on appearing in court.</li> </ul> <p>The Clinic is open from 9:30 a.m. to 3:30 p.m. Monday through Wednesday at the Stanley Mosk Courthouse in Downtown LA. All services are available in both English and Spanish. Services are provided by on-site staff attorneys and pro bono volunteers, including law students, trained by Public Counsel. More complex cases are handled in-house by a staff social worker, pro bono attorneys, and law students.</p> <p>Clinic staff work closely with the court to ensure our services meet litigants’ needs. We communicate informally with the clerk’s office on an almost weekly basis. We also try to meet with the presiding judge at least once per year.</p> <p>Our ultimate goal is to provide the litigants we serve with the tools they need to understand their case and to obtain the outcome they hope for.</p>	\$22,000
30	Public Law Center	DeFacto & Adoptive Parent Assistance Project	Orange	<p>The Orange County Superior Court sought a project partner to support adoptive parents in Juvenile Court proceedings, so the Court can use limited funds for contract attorneys for minor/parent representation. Without this project (and the complementary pro bono placement services PLC’s Family Law Unit provides), de facto parents in Dependency Court termination of parental rights proceedings are at risk of becoming the only parties unrepresented by counsel. De facto parents often become adoptive parents and likewise could go through that process without counsel. PLC’s DeFacto &amp; Adoptive Parent Assistance Project provides guidance and resources to unrepresented de facto parents and adoptive parents. Where appropriate, the Project also informs litigants about the benefits and options for finding pro bono counsel. When appropriate, participants will be referred out of the Project to PLC’s Family Law Unit for placement with trained pro bono counsel.</p>	\$47,000
31	Public Law Center	Orange County Courthouse Guardianship Clinic	Orange	<p>PLC’s Guardianship Clinic offers self-represented parties pro bono assistance dealing with the legal process surrounding guardianship proceedings. It is held at the Orange County Superior Court Central Justice every Monday (except holidays), coinciding with the Superior Court’s weekly calendar for guardianship hearings. Bilingual (English/Spanish) PLC staff and trained volunteers provide legal information and assist self-represented litigants in filling out court forms. Beginning in 2018, and with funding from the Partnership Fund, PLC expanded the long-running guardianship clinic to focus on the emerging needs of undocumented persons who seek to protect their minor U.S. citizen or LPR children. Previously, due to shared concerns with the Courts regarding possible ICE activities at Courthouses, select project services are provided at PLC’s offices within walking distance from the Courthouse. PLC closely monitors changes to federal policy in this regard and works with the court to continue to inform and provide services to individuals virtually when needed.</p> <p>Attorney client relationships are not established. Any party requiring representation by a lawyer who are income eligible are referred internally for pro bono services to PLC. If income ineligible they are referred to the Orange County Bar Association’s Lawyer Referral and Information Service. PLC utilizes "Know Your Rights" presentations and materials for community leaders and members to publicize the Guardianship Clinic and ensure undocumented individuals feel comfortable seeking PLC’s assistance.</p>	\$32,000

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32	Riverside Legal Aid	small estates partnership	Riverside	<p>This project is called the Small Estates Assistance Project. It serves low income people involved in Estates of \$166,250, the Court guideline for which estates need probate because of their financial size. When there was no pandemic we held clinics at courthouses in Riverside County on certain designated dates and times. Paperwork was prepared and advice given when necessary. Additionally we staffed certain courts with one of our contract attorneys on designated dates as well and were available to give advice to litigants there. Additional one on one services were handled through the office doing an intake evaluation on all potential clients and if they qualified they would get legal advice and also paperwork prepared. All clients were financially evaluated. Since the pandemic the separate clinic dates have merged with other one on one services done remotely, mostly telephonically and also with the in court representation dates as the courthouse is no longer available to us for clinics. Court representation dates done remotely are on a schedule by Court and Subject matter Monday through Friday. All 3 Riverside County Courthouses have appearance dates for our attorney. Additionally, we did probate accounting classes at our office or at courthouse or library locations. Probate accounting classes are now one on one remote services as well. The current situation is projected to remain the same until RLA can reopen safely to members of the public. At that point in time it is possible that we will resume clinics and classes in our own office buildings. Remote clinics and classes will only reopen in the event we are able to get those spaces from courthouses or libraries or other locations as well. It is unknown if that will happen</p>	\$70,000
33	San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	San Diego	<p>The Central Division Restraining Order Clinic (CDROC) is a collaboration between San Diego Volunteer Lawyer Program, Inc. (SDVLP) and the San Diego Superior Court (Court) to assist domestic violence victims and victims of elder or dependent adult abuse in obtaining legal protection and referrals for legal and social services providers. The CDROC provides one-on-one assistance to victims of abuse whereby staff or volunteer attorneys prepare Domestic Violence, Elder Abuse or Dependent Adult Abuse Restraining Order (DVRO) applications, which victims file in pro per. Assistance for victims will be provided in-person and remotely. The days and hours of operation of the CDROC are Monday through Friday, 8:30 a.m. to 5:00 p.m., with a specific number of hours per week dedicated to in-person and remote services, and intake.</p> <p>In addition to one-on-one legal assistance, the CDROC will hold virtual legal workshops and cover topics such as how to interact with the Court, and what constitutes service. While hearings are remote, these workshops will also provide information on best practices to attend hearings virtually. Further, the CDROC will develop and hold virtual legal workshops for SRLs on presenting evidence.</p> <p>Lastly, the CDROC will create two to five short, informational videos on topics related to domestic violence, such as safety planning, and the intersection between immigration and domestic violence, etc. The links to the videos will be distributed to clients.</p>	\$93,000

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34	San Luis Obispo Legal Assistance Foundation	San Luis Obispo County Rental Clinic	San Luis Obispo	<p>The goal of the Rental Clinic is to provide necessary legal information and assistance to indigent residents faced with housing problems in order to increase access to justice and prevent homelessness whenever possible. The clinic will provide telephone, videoconference and walk-in information and assistance to eligible self-represented tenants and landlords on the eviction process, types of notices required, unlawful detainer complaints, summons, responses, fee waivers, requests for trial, timeline of unlawful detainer cases, defenses, and security deposits. The target constituency is low-income self-represented landlords and tenants. The Clinic will be operated five days per week in both county courthouses (San Luis Obispo and Paso Robles) with time set aside for preparation, follow-up, meetings and community outreach. The Clinic will be stationed at the courthouse, as soon as the Court opens to the public. Subject to its COVID policies and procedures, the Court will provide convenient, accessible space for the clinic within each courthouse as well as telephone and Wi-Fi access. The Court will also provide referrals to the clinic and will meet with SLOLAF staff quarterly to provide feedback, discuss any concerns, assess whether the clinic is meeting short-term and long-term goals, project challenges, and make recommendations regarding logistics, staffing, and opportunities for additional future funding. The Clinic seeks to provide a holistic approach to housing and will offer other community resources and referrals, housing applications and information beyond just legal information.</p>	\$110,000
35	Santa Clara University Alexander Law Center	Consumer Debt Clinic	Santa Clara	<p>The Consumer Law Practice of Santa Clara Law's Katharine &amp; George Alexander Community Law Center (KGACLC) provides free legal services at the Santa Clara County Superior Court Self-Help Center. The goal of the Consumer Clinic is to promote greater economic security for low-income individuals and communities by providing 1) assistance for self-represented debt collection defense litigants; 2) educational information on rights and responsibilities; and 3) legal advice to individuals who require assistance for problems that have already arisen in consumer transactions.</p> <p>The Consumer Debt Clinic is directed by an experienced KGACLC attorney who trains and supervises law student interns and volunteer attorneys. In addition to one-on-one self-represented litigant assistance, the Consumer Debt Clinic provides information regarding alternatives to litigation, community resources, and other legal services that may be available in the community. KGACLC is the only non-profit law office in the area with an attorney dedicated to consumer law issues.</p>	\$50,000

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36	Senior Citizens Legal Services	Indigent Landlord/Tenant Services and Mediation	Santa Cruz, San Benito	<p>The goal of this innovative partnership project is to keep people safely housed by educating both sides in housing disputes and promoting mediation prior to unlawful detainer ("UD") hearings. Senior Citizens Legal Services ("SCLS") will partner with the Superior Court of Santa Cruz County ("Court") and contract with the Conflict Resolution Center ("CRC"). A full-time attorney will be hired to provide in-person, in pro per services to indigent tenants and landlords at the Santa Cruz County Law Library Monday-Friday 8-12, and at SCLS Monday-Thursday 1-4:30. Friday afternoons grant administrative duties will be conducted. A part time court mediation manager will be hired by CRC to oversee up to 10 pre and post filing UD mediations each month, at a location designated by CRC or via zoom, and day of court mediation at the Court's UD calendar two mornings a week. These new legal housing services will be promoted via e-mail to all non-profit, government and legal organizations in the two county jurisdiction and to the general public through media outlets and social media.</p> <p>The target population for these new services are indigent landlords and tenants from across Santa Cruz and San Benito counties. Both Santa Cruz Superior Court and SCLS already have existing partnerships with the County of San Benito, thus, except for day of court mediation, San Benito County residents will be eligible for most of these new services. All our customers will share two characteristics: they are concerned about housing and are unable to retain private representation.</p>	\$108,000
				<b>Total</b>	<b>\$2,580,574</b>

Program Name and Number: «ProgramNumber»

## GRANT AGREEMENT

### THE STATE BAR OF CALIFORNIA

#### OFFICE OF ACCESS & INCLUSION – EQUAL ACCESS FUND IOLTA FORMULA GRANT

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

#### RECITALS

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

#### AGREEMENTS

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

Program Name and Number: «ProgramNumber»

Eligibility Guidelines ("Eligibility Guidelines"), and Application Materials, including any additions or amendments made to the Application Materials by an agreement between the State Bar and Recipient, are incorporated into this Agreement as if set forth in their entirety in this Agreement. Recipient agrees to comply with the Act, Budget Act, Fee Schedule Act, Rules, Grant Provisions, Eligibility Guidelines, Assurances, and other agreements made in the Application Materials. Recipient agrees to comply with all lawful statutes, rules, regulations, guidelines, policies, instructions, and similar directives pertaining to the Program and the Fund (collectively, "Directives") issued by the State of California, the Supreme Court of the State of California or the State Bar, including without limitation, any Directive adopted after the Effective Date.

4. Recipient represents and warrants that its governing board, the officers, executive director, and similarly empowered staff have read and understand this Agreement, the Act, Rules, Application Materials, Eligibility Guidelines, and Grant Provisions. Recipient has familiarized appropriate staff with the requirements of this Agreement, the Act, the Rules, the Grant Provisions, and the Application Materials.
5. Recipient acknowledges that the terms of this Grant, including Grant Provision Article 4.05, Regulating Rule 3.680(E)(1), and Business and Professions Code Section 6222, require Recipient to submit to the State Bar an accurate and complete financial statement that has been audited or reviewed by a certified public accountant as specified in the Schedule of Charges and Deadlines.
6. The State Bar will pay the Grant Amount in accordance with the Grant Provisions. However, under no circumstances will the State Bar bear any liability to Recipient or to other persons or entities for delays in payments.
7. Termination.
  - a) Notwithstanding the Grant Provisions or any other provision of this Agreement regarding the payment of the Grant, Recipient acknowledges that the Grant Amount and all payments thereof shall be made from funds received by the State Bar pursuant to the Budget Act and Fee Schedule Act ("State Funding"), and are contingent upon the availability and sufficiency of such funds, as determined by the State Bar in its sole discretion. Consequently, Recipient shall not be guaranteed any specific dollar amount in grant funds, or any grant funds at all, if funds received pursuant to State Funding are insufficient or unavailable to the State Bar. This Agreement shall terminate automatically if State Funding becomes unavailable. The State Bar will not assume any liability whatsoever to Recipient for any failure to pay the Grant Amount or any part thereof that results because funds are insufficient or unavailable.
  - b) The State Bar may terminate this Agreement pursuant to the process set forth in Rule 3.691.
  - c) The State Bar may terminate this Agreement, in its sole discretion, with or without cause and for any reason upon thirty (30) days' written notice to Recipient.
  - d) The State Bar may terminate for cause, without prejudice to State Bar's right to recover any Grant Amount previously paid, if Recipient fails to comply with the provisions of this Agreement. The termination shall be effective five (5) business

Program Name and Number: **«ProgramNumber»**

days after the State Bar sends written notice of termination to Recipient pursuant to Section 20.

- e) This Agreement will terminate automatically in the event of the bankruptcy or insolvency of either Party.
- 8. This Agreement does not impose on the State Bar any obligation to provide Recipient funds in excess of the Grant Amount or beyond the end of the Grant Period.
- 9. Recipient shall spend the Grant Amount received in connection with the Program and Fund in each county and in the amounts set forth in Attachment A – Grant Allocation Detail, which is attached hereto and incorporated herein by reference.
- 10. Recipient represents and warrants that the Recipient's Application Materials for the Grant under the Program and Fund does not misstate or omit any material fact. Recipient will notify the State Bar within five (5) business days after any change in any material fact affecting Recipient's eligibility to receive funds under the Program and Fund, including without limitation, any change that affects the accuracy of any statement made in conjunction with Recipient's application for the grant under the Program and Fund. Recipient will also notify the State Bar within five (5) business days of any material change in the planned activities or proposed budget contained in the Application Materials or any revision thereto.
- 11. Recipient will not make any misrepresentations or misstatements of fact in any communications or report to the State Bar. In the event Recipient later discovers that any statement made to the State Bar is no longer true, Recipient will notify the State Bar within five (5) business days after discovering that the statement is no longer true.
- 12. Recipient will notify the State Bar within five (5) business days of Recipient's awareness of any of the following events: (1) a decision to change Recipient's name, merge or consolidate with another entity, cease operations, or cease the activities funded by the Grant; (2) a decision to close or relocate any main or branch office; (3) significant management changes, including the departure of and/or hiring or appointment of the executive director or board chairperson; (4) Recipient becomes insolvent or is in danger of becoming insolvent within three months; (5) a monetary judgment, settlement, sanction, penalty, or force majeure event that will substantially impact Recipient's delivery of legal services; (6) Recipient or any of Recipient's officials (e.g., officers and executive team members) or employees with control over finances or financial management responsibilities is investigated for or charged with fraud, misappropriation, embezzlement, theft, or any similar offense, or are suspended, disciplined, or delicensed by a bar or other professional licensing organization; (7) Recipient is investigated or audited by the Legal Services Corporation or any other provider of funds to Recipient.
- 13. In support of the State Bar's obligation to the Judicial Council to ensure full participation by Program recipients in maintaining and using statewide on-line resources for legal advocates and consumers of legal services, Recipient will:
  - a) Ensure that, during the Grant Period, Recipient is accurately identified on the statewide legal services websites, including, as appropriate, in the:
    - i. Client referral directory on LawHelpCA.org;



Program Name and Number: «ProgramNumber»

State Bar's request, to execute any additional documents necessary to effect such license.

18. Recipient agrees to indemnify, defend, and hold harmless State Bar (including its Board of Trustees, officers, agents, and employees, as the same may be constituted now and from time to time hereafter) from and against any and all liabilities, losses, damages, expenses or costs, whatsoever (including reasonable attorneys' fees, costs, and expenses), which may arise against or be incurred by the State Bar as a result of or in connection with (i) claims by any and all contractors, subcontractors, providers of consulting services, materialmen, laborers, or any other person, firm, or corporation retained by Recipient to furnish or supply work, service, materials, or supplies in connection with the performance of this Agreement; (ii) claims by any person, firm, or corporation for loss, injury or damage by Recipient or Recipient's agents in connection with the provision of legal services pursuant to this Agreement; (iii) any acts or omissions of Recipient, or its officers, employees or agents, in applying for, accepting, expending or applying the Grant Amount or in performing activities or services in breach of this Agreement. Recipient shall be liable to the State Bar for all costs (including but not limited to reasonable attorneys' fees, costs and expenses) that may be incurred) arising from or in connection with the State Bar's enforcement of its rights under this Section 18. This indemnity provision shall survive the termination or expiration of this Agreement.
19. Recipient will maintain insurance coverage such as commercial general liability insurance, workers' compensation insurance and comprehensive automobile liability sufficient to cover its services, activities, risks, and potential omissions of the services in accordance with generally-accepted industry standards and as required by law. Recipient shall provide the State Bar offices at 180 Howard Street, San Francisco, CA 94105 Attn: Risk Management with these certificates of insurance within thirty (30) days of the Effective Date. Recipient will ensure subcontractors maintain insurance coverage consistent with this Section.
20. Any notices to be given by either Party to the other must be in writing, and both emailed and delivered personally or by first-class, certified, registered, or overnight mail addressed to the Parties at the addresses stated below:

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

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

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

Attention: «PrimaryContactName»  
«PrimaryContactJobTitle»

Program Name and Number: «ProgramNumber»

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

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

Program Name and Number: **«ProgramNumber»**

[Signatures Follow]

Program Name and Number: **«ProgramNumber»**

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

**THE STATE BAR OF CALIFORNIA**

**RECIPIENT**

Date: \_\_\_\_\_

Date: \_\_\_\_\_

By: \_\_\_\_\_  
\_\_\_\_\_

By: \_\_\_\_\_  
\_\_\_\_\_

Print Title of State Bar Executive Officer

Print Name of Executive Director

By: \_\_\_\_\_  
\_\_\_\_\_

Print Title of Board Officer

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

ATTACHMENT A – GRANT ALLOCATION DETAIL

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

Recipient: «ProgramLegalName»

Equal Access Fund

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

Grant Amount: «FinalEAFGrantAllocation»

County	Qualified Expenditures	Basic Allocation	Pro Bono Allocation	Total Allocation
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Attachment A7 - 2022 IOLTA Formula Equal Access Fund Grantees

# Index	Organization	Grant Year	EAF Grant Amount
1	Advancing Justice - Asian Law Caucus	2022	\$632,530
2	Affordable Housing Advocates	2022	\$20,690
3	Aids Legal Referral Panel	2022	\$57,330
4	Alameda County Homeless Action Center	2022	\$258,050
5	Alliance for Children's Rights	2022	\$793,070
6	Asian Americans Advancing Justice - Los Angeles	2022	\$930,060
7	Asian Pacific Islander Legal Outreach	2022	\$168,540
8	Bay Area Legal Aid	2022	\$821,520
9	Bet Tzedek Legal Services	2022	\$1,679,700
10	California Advocates for Nursing Home Reform	2022	\$396,459
11	California Indian Legal Services	2022	\$451,390
12	California Rural Legal Assistance Foundation	2022	\$396,459
13	California Rural Legal Assistance, Inc.	2022	\$4,276,880
14	California Women's Law Center	2022	\$396,459
15	Capital Pro Bono Inc.	2022	\$267,430
16	Casa Cornelia Law Center	2022	\$535,730
17	Center for Gender and Refugee Studies - California	2022	\$396,459
18	Center for Human Rights and Constitutional Law	2022	\$396,459
19	Central California Legal Services	2022	\$2,020,730
20	Centro Legal de la Raza	2022	\$358,830
21	Chapman University	2022	\$32,390
22	Child Care Law Center	2022	\$396,459
23	Coalition of California Welfare Rights Organizations	2022	\$396,459
24	Community Lawyers Inc.	2022	\$11,970
25	Community Legal Aid SoCal	2022	\$1,568,630
26	Community Legal Services in East Palo Alto	2022	\$383,760
27	Contra Costa Senior Legal Services	2022	\$62,450
28	Dependency Advocacy Center	2022	\$154,560
29	Disability Rights California	2022	\$5,510,890
30	Disability Rights Education and Defense Fund	2022	\$396,459
31	Disability Rights Legal Center	2022	\$407,560
32	East Bay Community Law Center	2022	\$279,900
33	Elder Law & Advocacy	2022	\$277,020
34	Eviction Defense Collaborative	2022	\$84,360
35	Family Violence Appellate Project	2022	\$396,459
36	Family Violence Law Center	2022	\$43,560
37	Greater Bakersfield Legal Assistance	2022	\$987,190
38	Harriett Buhai Center for Family Law	2022	\$317,370
39	Housing and Economic Rights Advocates	2022	\$200,440
40	IEP Collaborative, Inc.	2022	\$1,220
41	Immigrant Legal Resource Center	2022	\$396,459
42	Impact Fund	2022	\$396,459
43	Inland Counties Legal Services	2022	\$2,998,500
44	Inland Empire Latino Lawyers Association, Inc.	2022	\$111,400
45	Inner City Law Center	2022	\$1,289,290
46	Justice & Diversity Center of the Bar Association of San Francisco	2022	\$226,010
47	Justice in Aging	2022	\$396,459
48	La Raza Centro Legal	2022	\$98,910
49	LACBA Counsel for Justice	2022	\$131,870

# Index	Organization	Grant Year	EAF Grant Amount
50	Law Foundation of Silicon Valley	2022	\$513,600
51	Lawyers' Committee for Civil Rights	2022	\$540,010
52	Learning Rights Law Center	2022	\$206,320
53	Legal Access Alameda	2022	\$69,330
54	Legal Aid at Work	2022	\$911,350
55	Legal Aid Foundation of Los Angeles	2022	\$2,587,610
56	Legal Aid Foundation of Santa Barbara County	2022	\$308,000
57	Legal Aid of Marin	2022	\$106,770
58	Legal Aid of Sonoma County	2022	\$288,800
59	Legal Aid Society of San Bernardino	2022	\$650,040
60	Legal Aid Society of San Diego	2022	\$1,555,140
61	Legal Aid Society of San Mateo County	2022	\$172,270
62	Legal Assistance for Seniors	2022	\$60,820
63	Legal Assistance to the Elderly	2022	\$59,840
64	Legal Services for Children	2022	\$98,520
65	Legal Services for Prisoners with Children	2022	\$396,459
66	Legal Services for Seniors	2022	\$221,470
67	Legal Services of Northern California	2022	\$2,377,090
68	Los Angeles Center for Law and Justice	2022	\$275,660
69	Loyola Marymount University	2022	\$444,830
70	McGeorge Community Legal Services	2022	\$177,540
71	Mental Health Advocacy Services	2022	\$175,800
72	National Center for Youth Law	2022	\$396,459
73	National Health Law Program	2022	\$396,459
74	National Housing Law Project	2022	\$396,459
75	National Immigration Law Center	2022	\$396,459
76	Neighborhood Legal Services	2022	\$1,623,930
77	OneJustice	2022	\$396,459
78	Open Door Legal	2022	\$61,760
79	Prison Law Office	2022	\$518,310
80	Public Advocates Inc.	2022	\$640,850
81	Public Counsel	2022	\$2,204,340
82	Public Interest Law Project	2022	\$396,459
83	Public Law Center	2022	\$1,212,580
84	Riverside Legal Aid	2022	\$481,160
85	San Diego Volunteer Lawyer Program	2022	\$511,660
86	San Joaquin College of Law	2022	\$60,510
87	San Luis Obispo Legal Assistance Foundation	2022	\$101,610
88	Santa Clara County Asian Law Alliance	2022	\$131,730
89	Santa Clara University Alexander Law Center	2022	\$58,590
90	Senior Adults Legal Assistance	2022	\$44,990
91	Senior Advocacy Network	2022	\$97,440
92	Senior Citizens Legal Services	2022	\$47,550
93	Social Justice Collaborative	2022	\$134,680
94	UC Davis School of Law Legal Clinics	2022	\$236,660
95	UnCommon Law	2022	\$347,640
96	USD School of Law Legal Clinics	2022	\$245,730
97	Veterans Legal Institute	2022	\$189,930
98	Wage Justice Center	2022	\$54,040
99	Watsonville Law Center	2022	\$131,110
100	Western Center on Law and Poverty	2022	\$396,459

# Index	Organization	Grant Year	EAF Grant Amount
101	Worksafe, Inc.	2022	\$396,459
102	Youth Law Center	2022	\$396,459
103	Yuba-Sutter Legal Center for Seniors	2022	\$35,890
		Total	<u>\$58,147,328</u>