

**JUDICIAL COUNCIL OF CALIFORNIA
ADMINISTRATIVE OFFICE OF THE COURTS**
455 Golden Gate Avenue
San Francisco, California 94102-3688

Report

TO: Members of the Judicial Council

FROM: Administrative Office of the Courts
Bonnie Rose Hough, Managing Attorney, Center for Families,
Children & the Courts, 415-865-7668, bonnie.hough@jud.ca.gov

DATE: December 1, 2009

SUBJECT: Equal Access Fund: Distribution of Funds for Partnership
Grants (Action Required)

Issue Statement

The State Bar Legal Services Trust Fund Commission has submitted a report (attached at pages 6–49) on the distribution of Equal Access Fund grants. In that report, the commission requests that the Judicial Council approve the distribution of \$1,625,000 according to the statutory formula set out in the State Budget. For the last ten years, the Budget Act authorizing the Equal Access Fund has provided that the Judicial Council must approve the commission’s recommendations if the council determines that the awards comply with statutory and other relevant guidelines.

Recommendation

The Administrative Office of the Courts recommends that the Judicial Council, effective December 15, 2009, approve the allocation of \$1,625,000 in Equal Access Fund partnership grants to the State Bar Legal Services Trust Fund Commission for distribution to the following legal service agencies for programs conducted jointly with courts that provide legal assistance to self-represented litigants:

Bay Area Legal Aid

Domestic Violence Emergency Orders Clinic \$40,713

Bet Tzedek Legal Services

Elder Law Project \$101,703

California Rural Legal Assistance

Landlord/Tenant and Small Claims Pro Per Assistance Project,
San Joaquin..... \$56,703
Stanislaus County Landlord/Tenant Pro Per Clinic \$61,703

Central California Legal Services, Inc.

Elder Abuse Access to Justice Partnership..... \$66,703

Contra Costa Senior Legal Services

Senior Self-Help Clinic \$29,703

East Bay Community Law Center

Consumer Law Clinic \$51,703

Elder Law and Advocacy

Bilingual Conservatorship Clinic \$41,703

Greater Bakersfield Legal Assistance, Inc.

Family Law Access Project..... \$61,703

Inland Counties Legal Services

Blythe Legal Information/Advocacy Partnership Project \$11,603

Legal Aid Foundation of Los Angeles

Torrance Self-Help Legal Access Center \$41,703

Legal Aid Foundation of Santa Barbara County

Legal Resource Center in Lompoc \$71,703

Legal Aid Society of Orange County

Central Justice Center Self-Help Center..... \$66,703

Legal Aid Society of San Diego, Inc.

Civil Harassment Temporary Restraining Order Clinic..... \$61,703
Unlawful Detainer Assistance Program, South County Courthouse..... \$66,703

Legal Aid Society of San Mateo County

San Mateo County Landlord/Tenant Clinic \$46,703

Legal Assistance for Seniors

Partnership to Assist Guardianship Litigants..... \$61,703

Legal Services of Northern California

Consumer Assistance Clinic (Yolo	\$56,703
Mendocino County Self-Help Legal Access Center	\$51,703
Shasta Legal Information and Assistance Program	\$24,703
Solano County Restraining Order Clinic.....	\$51,703

Los Angeles Center for Law and Justice

Help With Orders Prepared for Enforcement	\$66,703
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Neighborhood Legal Services of Los Angeles County

Domestic Abuse Self-Help Project.....	\$46,703
San Gabriel Valley Self-Help Legal Access Center.....	\$66,703

Pro Bono Project Silicon Valley

Domestic Violence Self-Representation Assistance.....	\$16,703
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Public Counsel

Appellate Self-Help Clinic	\$51,703
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Public Law Center

Orange County Courthouse Guardianship Clinic.....	\$38,703
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San Diego Volunteer Lawyer Project

North County Civil Harassment Restraining Order Clinic	\$66,703
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Senior Citizens' Legal Services

Conservatorship and Elder Abuse Project.....	\$53,703
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Watsonville Law Center

Language Access Project.....	\$91,703
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Total.....	\$1,625,000
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Rationale for Recommendation

For the last 10 years, 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.” (Stats. 2009, ch. 1, pp. 18–22; Stats. 2008, ch. 268, pp. 32–36; Stats. 2007, ch.171, pp. 40–42; Stats. 2006, ch. 47, pp. 26–30; Stats. 2005, ch. 38, pp. 9–11; Stats. 2004, ch. 208, pp.16–17; Stats. 2003, ch. 157, pp. 11–12; Stats. 2002, ch. 379, pp. 30–31; Stats. 2001, ch. 106, pp. 73–74; Stats. 2000, ch. 52, pp. 78–79; Stats. 1999, ch. 50, pp. 55–56.) The Budget Act also applied the State Appropriation Limit (SAL) to the Judiciary Budget in 2006 and 2007. In 2008, the SAL was replaced by a Consumer Price

Index based enhancement of 2.7 percent. No such increases were available in the current budget, therefore, the total budgetary allocation for the 2009–2010 grant year is \$10,778,365.

In 2005, the Legislature and the Governor approved the Uniform Civil Fees and Standard Fee Schedule Act. That act established a new \$4.80 fee for each filing and its distribution to the Equal Access Fund. The estimated annual revenue from this filing fee is \$5,847,564. The trial courts began collecting the fee in January 2006, and the first payment was made to the State Bar in June 2006. Based on the history of funding, the Legal Services Trust Fund Commission is proposing a distribution this year of \$1,625,000 to legal services programs for partnership grants. If funds are received in excess of that \$1,625,000, they will be included in the legal services grants in the coming year.

The budget-control language requires that the Judicial Council distribute the Equal Access Fund grants *to* legal services providers *through* the State Bar Legal Services Trust Fund Commission. The Budget Act states that “[t]he Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. . . . The Judicial Council may establish additional reporting or quality control requirements”¹

In March 2005, the Judicial Council submitted a report describing the operation and activities of the Equal Access Fund to the California Legislature. In preparing the report, staff to the commission and the Administrative Office of the Courts worked extensively with legal services agencies to develop systems for the agencies to effectively evaluate their programs. All recipients of partnership grants conduct an annual evaluation of the effectiveness of the programs. Programs will be required to submit their evaluation results to the commission by March 1, 2011.

Under the Budget Act, the Chief Justice 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. Members appointed by the Chief Justice participated actively in the review of the partnership grants.

The Budget Act provides that 90 percent of the funds be distributed to legal services agencies according to a statutory formula. The council approved the distribution on August 14. The remaining 10 percent of the funds are to be distributed to legal services programs to provide self-help assistance at the courts. The process for choosing the legal services programs to receive these partnership grants is stated in the attached report of the Legal Services Trust Fund Commission.

¹ The Budget Act language is attached at page 14.

Distributing the funds to the commission will allow it to carry out the terms of the Budget Act and put the partnership grant funds into the hands of legal services providers that will enter into joint projects with the courts to provide legal assistance to self-represented litigants. The fiscal year for these grants commences January 1, 2010.

Alternative Actions 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 proposed distribution if it finds that the statutory and other relevant guidelines are met.

Comments From Interested Parties

The recommendations have been approved by the Legal Services Trust Fund Commission as required by law. The statutory scheme does not contemplate public comment.

Implementation Requirements and Costs

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.

AOC 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 one-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. AOC staff support will be covered by the provision for administrative costs in the Budget Act appropriation.

Attachment



THE STATE BAR OF CALIFORNIA

LEGAL SERVICES TRUST FUND PROGRAM

180 HOWARD STREET, SAN FRANCISCO, CALIFORNIA 94105-1639

TELEPHONE: (415) 538-2252; FAX: (415) 538-2529

Stephanie L. Choy
Managing Director
(415) 538-2240

Lorna Choy
Sr. Grants Administrator
(415) 538-2535

Denise Teraoka
Grants Administrator
(415) 538-2545

Daniel Passamaneck
Grants Administrator
(415) 538-2403

Robert G. Lee
Sr. Accountant
(415) 538-2009

DATE: November 25, 2009

TO: The Judicial Council of California

FROM: Stephanie Choy, Managing Director
Legal Services Trust Fund Program

SUBJECT: Equal Access Fund: Distribution of Eleventh Year
Equal Access Fund Partnership Grants

Background

The Equal Access Fund was first included in the 1999 Budget Act and has continued to be included in every subsequent budget act up to and including the Budget Act of 2009. The budget control language establishes that the Equal Access Fund will support two different grants programs: IOLTA-Formula Grants, and Partnership Grants. (The budget also provides for funds for the cost of administration.) The annual allocation for the first six grant cycles was \$9.5 million, to be distributed by the Judicial Council in grants to legal services providers through the Legal Services Trust Fund Commission of the State Bar.

In 2005, the Uniform Civil Fees and Standard Fee Schedule Act was approved by the Legislature and the Governor. That Act established a new distribution to the Equal Access Fund of \$4.80 per filing fee. Filing fee revenue distributed through to the Equal Access Fund was \$4 million, 5.7 million, and \$5.4 million in 06-07, 07-08, and 08-09, respectively. Current receipts of filing fee funds supported an allocation of \$5,685,000 in total grant year filing fee income for distribution in 2009-10. If actual filing fee receipts for 2009-10 exceed this sum, the excess will be included in the legal services grants for 2010-11.

The Budget Act also applied the State Appropriation Limit (SAL) to the Judiciary Budget for the first time in 2006, and again in 2007 and 2008. No SAL was applied in the 2009 Budget Act, resulting in a General Fund allocation of \$10,776,000. This allocation, together with the filing fee revenue, results in a total Budget Act allocation of \$16,461,000.

The Trust Fund's July 2009 report to this Council regarding the distribution of IOLTA-Formula Equal Access Grants was produced prior to the finalization of the Budget Act and relied on estimates of total available funding, upon which we recommended, and the Council approved, a total of \$16,250,000 in 2009-2010.

Any amount collected in excess of this amount will be distributed in the 2010-2011 grant year. Distribution is allocated pursuant to the language of the Budget Act:

- Ninety percent of the grant funds have been allocated for distribution to IOLTA-eligible legal services providers according to a formula set forth in California's Interest on Lawyer Trust Accounts ("IOLTA") statute. Funds allocated for this category of grants, called "IOLTA-Formula Grants," equal \$14,625,000.
- Ten percent of the grant funds were set aside for Partnership Grants to IOLTA-eligible legal services providers for "joint projects of courts and legal services programs to make legal assistance available to pro per litigants." Funds allocated for Partnership Grants equal \$1,625,000.
- Administrative costs, in a total amount up to \$812,500. are shared between the Judicial Council and the Trust Fund Commission.

Ultimately, the Budget Act did provide for a funding increase based on slightly higher filing fee receipts than had been anticipated by this Council at its August 14 meeting, but this change produced effectively nominal impact for grantees under the Trust Fund Program's statutory funding formula (Business and Professions Code sec. 6216). Therefore, with the approval of the Council, it was concluded that IOLTA-Formula allocations for 2009-10 would be based on the value of last year's total available funds, with this year's additional increase to be awarded as part of next year's distributions. We request that the Partnership grant funds be handled in the same way.

The 2009-10 budget control language, setting forth the basis for apportioning available funds between administrative costs, IOLTA-Formula Equal Access Grants, and Partnership Grants, is attached as Attachment A.

We are now requesting that you approve the award of the eleventh round of Partnership Grants. This report describes the process and criteria the commission uses to select the successful applicants, and provides information about the successful proposals, which are listed and described in Attachment B.

Request for Proposals

In August, the commission issued a Request for Proposals (RFP) for the estimated \$1,625,000 available this year for Partnership Grants to all programs currently receiving funding from the Legal Services Trust Fund Program. The RFP in Attachment C sets forth selection criteria and describes the selection process.

Selection Criteria

The Budget Act contains four essential elements for Partnership Grants:

- Recipients must be organizations that are eligible for a Legal Services Trust Fund Program grant.
- The funds must be granted for joint projects of legal services programs and courts.
- The services must be for indigent persons as defined in the Trust Fund Program statute.
- The services must be for self-represented litigants.

As previously reported to this council, we began this grant-making process by reviewing these criteria among commission members, court staff, legal services program directors, and AOC and commission staff. This group concluded, and the commission concurred, that it was important to give courts and legal services programs considerable latitude to develop effective models to address their particular needs and resources. The commission made a commitment in the RFP for each round of grants to fund a range of projects to address different needs. The proposals that were eventually funded include projects, for example, in both urban and rural areas, in larger and smaller counties, projects that address different areas of law, both new projects and expansions of existing projects, and so forth.

Last year, the Partnership Committee of the Trust Fund Commission reviewed Partnership grant policies and priorities, and after careful consideration, affirmed most of those policies, with a few minor changes. The committee expressly recognized the critical role that some Partnership-funded projects have assumed in some regions where fundraising continues to be an extraordinary challenge and alternative resources do not exist. Therefore, in 2008 the Committee and its advisors chose to soften their practice of strict weaning from funding and termination of funding after five years, where exceptional and compelling circumstances so dictate, particularly in rural areas or where disasters have struck. Since that time, deteriorating economic conditions have reinforced the wisdom of this determination. This policy has therefore been continued to the present grant cycle.

Consequently, while this year's grantees include some new projects and first-time programs, there is also one projects that is being funded for a sixth year of service in a heavily-populated region with high demand that has experienced significant cutbacks to court services to self-represented litigants. Additionally, one project sought a seventh year of funding to support services to a vast and underserved

region of Northern California. This project is recommended for a modest grant with the express caution that it will not be considered for Partnership funds in the future.

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

- A letter of support from the applicable court's presiding judge.
- Written agreements between the legal services programs and the courts. As part of the grant process, we require recipients to develop a Memorandum of Understanding with the cooperating court indicating how the joint project, the court, and any existing self-help center, including the family law facilitator as appropriate, will work together.
- Plans to provide for lawyers to assist and to provide direct supervision of paralegals and other support staff.
- Protocols to minimize conflicts of interest, or to address them as needed, including: what resources are available to individuals who cannot be served for any reason; what would be the relationship between the provider and the pro per litigant; and other similar issues.
- A plan to anticipate and meet the needs of litigants who are not within the legal services provider's service area or are ineligible for their services. While this can be a challenge for organizations with limited funding, a number of applicants have developed collaborations with other legal services providers that facilitate a broad availability of services. These solutions are being studied by the commission for possible applicability to other programs.
- A plan to address the needs of unrepresented litigants who do not meet the financial eligibility requirements (e.g., by providing general information in the form of local information sheets, videos, workshops, etc.). Programs that have learned interesting lessons in this area are being closely evaluated so that ideas may be gleaned which might assist other programs.
- A clearly stated policy regarding administration of financial eligibility standards, and established protocols to observe that policy.
- A plan for project continuity, including efforts to identify and secure additional funding within three years and to be free of Partnership support after five years.
- A multi-phase evaluation plan including such components as surveys, interviews, focus groups, courtroom observations, and file reviews, with a

commitment to submit both qualitative and quantitative project results in a report within three months of the end of the grant year.

Because all recipients of the Partnership Grants are organizations that already receive IOLTA Grants and IOLTA-Formula Grants through the Legal Services Trust Fund Program, they are already subject to requirements for oversight and reporting that are in place. The commission has also developed additional reporting requirements and evaluation procedures to apply specifically to the work to be done under these additional grants. Grantees will be provided with special training and assistance in developing and executing evaluation plans.

Review and Selection Process

The Chief Justice continues to appoint one-third of the members of the Legal Services Trust Fund Commission, plus three advisors. All of them participate actively in the commission's work, with each serving or having served on one of its three standing committees, including the Partnership Grants Committee.

The Partnership Grants Committee of the Legal Services Trust Fund Commission has the responsibility for evaluating the proposals and recommending successful applicants to the full commission. The chair of the Council has appointed one-third of the commission's voting members, plus three non-voting judges. (The judges participate fully – and vote – during committee considerations; they participate fully but do not vote in full commission deliberations.) A list of the committee members is provided in Attachment D.

Committee members were each assigned primary review responsibility for three or four applications, and were then divided into evaluation "teams" with a commission staff member providing background and conducting any necessary follow-up.

Committee members completed an evaluation form (Attachment E) to ensure that each proposal addressed the basic requirements and that key issues had been discussed with the cooperating court. The form also provided a structure for evaluating how well each proposal met a set of thirteen discretionary criteria that, together, give a broad but accurate picture of program strategy and organization.

After completing these individual reviews, committee members then met as evaluation teams to discuss specific concerns or issues arising as to any specific project. The full committee then met on November 4, 2009 to select successful proposals and settle upon tentative allocations based on individual and subcommittee evaluations. Staff obtained advice from programs tentatively scheduled to receive significantly less than they had requested in their proposals, to resolve outstanding programmatic questions and ensure that proposed projects would still be viable under the suggested funding structure. These proposed grants, adjusted by staff pursuant to further investigations conducted after the November 4 meeting at the direction of the Partnership Grants Committee, were reviewed by the

committee in conference on November 20 and subsequently presented to the commission for approval later that day.

The commission is satisfied that all grant amounts represent sufficiently substantial investments as to provide meaningful support.

Overview of Applications and Proposed Grants

For the \$1,625,000 available in grants, the commission received a total of 31 applications, seeking a total of \$1,939,659. Proposals were received for refunding from 23 of the 31 projects funded last year. Seven proposals for new projects were also received. One project that had previously received, then lost, Partnership funding applied for resumption funding. Seven projects that had already received funding did not reapply for further funding, of which five were “termed out” after five years of funding (pursuant to a policy setting a five-year limit on funding under typical circumstances).

All of the recommended grants involve a collaboration between at least one legal services program and one court. Some are creative partnerships among multiple legal services programs, courts, and local community groups. Several propose to utilize technology to make services more accessible, though all would be located on-site at (or in close proximity to) the courthouse.

The recommended grants reflect a mix of geographic areas and of program types. All include a high quality of work to be performed, high demand for services, and innovative approaches to maximizing the impact of the grant. The commission is requesting your approval for the following grant awards:

BAY AREA LEGAL AID

Domestic Violence Emergency Orders Clinic.....\$40,713

BET TZEDEK LEGAL SERVICES

Elder Law Project.....\$101,703

CALIFORNIA RURAL LEGAL ASSISTANCE

San Joaquin County Landlord/Tenant and Small Claims Pro Per Assistance Project:\$56,703

Stanislaus County Landlord/Tenant Pro Per Clinic\$61,703

CENTRAL CALIFORNIA LEGAL SERVICES, INC.

Elder Abuse Access to Justice Partnership.....\$56,703

CONTRA COSTA SENIOR LEGAL SERVICES

Senior Self Help Clinic.....\$29,703

EAST BAY COMMUNITY LAW CENTER	
Consumer Law Clinic	\$51,703
ELDER LAW AND ADVOCACY	
Bilingual Conservatorship Clinic	\$41,703
GREATER BAKERSFIELD LEGAL ASSISTANCE, INC.	
Family Law Access Project	\$61,703
INLAND COUNTIES LEGAL SERVICES	
Blythe Legal Information/Advocacy Partnership Project.....	\$11,603
LEGAL AID FOUNDATION OF LOS ANGELES	
Torrance Self-Help Legal Access Center	\$41,703
LEGAL AID FOUNDATION OF SANTA BARBARA COUNTY	
Legal Resource Center in Lompoc.....	\$71,703
LEGAL AID SOCIETY OF ORANGE COUNTY	
Central Justice Center Self-Help Center	\$66,703
LEGAL AID SOCIETY OF SAN DIEGO, INC.	
Civil Harassment Temporary Restraining Order Clinic.....	\$61,703
Unlawful Detainer Assistance Program – South County Courthouse.....	\$66,703
LEGAL AID SOCIETY OF SAN MATEO COUNTY	
San Mateo County Landlord/Tenant Clinic.....	\$46,703
LEGAL ASSISTANCE FOR SENIORS	
Partnership to Assist Guardianship Litigants.....	\$51,703
LEGAL SERVICES OF NORTHERN CALIFORNIA	
Mendocino County Self Help Legal Access Center	\$51,703
Shasta Legal Information and Assistance Program	\$24,703
Solano County Restraining Order Clinic.....	\$51,703
Yolo Consumer Advice Clinic	\$56,703
NEIGHBORHOOD LEGAL SERVICES OF LOS ANGELES COUNTY	
Domestic Abuse Self-Help Project	\$46,703
San Gabriel Valley Self-Help Legal Access Center	\$66,703
PRO BONO PROJECT SILICON VALLEY	
Domestic Violence Self-Representation Assistance.....	\$16,703

PUBLIC COUNSEL	
Appellate Self-Help Clinic.....	\$51,703
PUBLIC LAW CENTER	
Orange County Courthouse Guardianship Clinic	\$38,703
SAN DIEGO VOLUNTEER LAWYER PROJECT	
North County Civil Harassment Restraining Order Clinic	\$66,703
SENIOR CITIZENS LEGAL SERVICES	
Conservatorship and Elder Abuse Project.....	\$53,703
THE WATSONVILLE LAW CENTER	
Language Access Project.....	\$91,703
Total	\$1,625,000

Highlights of each of project are listed in Attachment B. The successful applicants are strong projects that reflect a range of characteristics as described in the RFP and the selection criteria.

BILL NUMBER: ABX4 1

CHAPTER 1

FILED WITH SECRETARY OF STATE JULY 28, 2009

APPROVED BY GOVERNOR JULY 28, 2009

PASSED THE SENATE JULY 23, 2009

PASSED THE ASSEMBLY JULY 23, 2009

AMENDED IN SENATE JULY 23, 2009

INTRODUCED BY Assembly Member Evans: JULY 2, 2009

An act to amend and supplement the Budget Act of 2009 (Chapter 1 of the 2009-10 Third Extraordinary Session) by amending Items 0250-001-0001, [etc] and by repealing Items 0520-001-9329 [etc] of Section 2.00 of that act, and by amending Sections 3.60 [etc], by adding Sections 3.55 [etc] and by repealing Section 24.65 of, that act, relating to the State Budget, making an appropriation therefor, and declaring the urgency thereof, to take effect immediately.

LEGISLATIVE COUNSEL'S DIGEST

I object to the following appropriations contained in Assembly Bill 1, Fourth Extraordinary Session.

[Deleted items deleted as not relevant to the Equal Access Fund Allocation]

With the above deletions, revisions, and reductions, I hereby approve Assembly Bill 1, Fourth Extraordinary Session.

ARNOLD SCHWARZENEGGER

AB 1, Evans. Budget Act of 2009: revisions.

The Budget Act of 2009 (Chapter 1 of the 2009-10 Third Extraordinary Session) made appropriations for the support of state government for the 2009-10 fiscal year. This bill would make revisions in those appropriations for the 2009-10 fiscal year. The bill would make specified reductions in certain appropriations. The California Constitution authorizes the Governor to declare a fiscal emergency and to call the Legislature into special session for that purpose. The Governor issued a proclamation declaring a fiscal emergency, and calling a special session for this purpose, on July 1, 2009. This bill would state that it addresses the fiscal emergency declared by the Governor by proclamation issued on July 1, 2009, pursuant to the California Constitution. This bill would declare that it is to take effect immediately as an urgency statute.

Appropriation: yes.

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

SECTION 1. For purposes of this act, the "Budget Act of 2009" means Chapter 1 of the 2009-10 Third Extraordinary Session, as amended by Chapter 3 of the 2009-10 Third Extraordinary Session.

[...]

SEC. 9. Item 0250-101-0001 of Section 2.00 of the Budget Act of 2009 is amended to read:

ATTACHMENT A

0250-101-0001--For local assistance, Judicial Branch 18,409,000
Schedule:

- (1) 45.10-Support for Operation of Trial Courts6,430,000
- (2) 45.55.010-Child Support Commissioners Program (Article 4 (commencing with Section 4250) of Chapter 2 of Part 2 of Division 9 of the Family Code)..... 54,332,000
- (3) 45.55.020- California Collaborative and Drug Court Projects 5,791,000
- (4) 45.55.030-Federal Child Access and Visitation Grant Program800,000
- (5) 45.55.050-Federal Court Improvement Grant Program 700,000
- (6) 45.55.070-Grants-- Other 745,000
- (7) 45.55.080-Federal Grants—Other..... 775,000
- (8) 45.55.090-Equal Access Fund Program..... 10,776,000**
- (9) Reimbursements -59,665,000
- (10) Amount payable from Federal Trust Fund (Item 0250-101- 089) -2,275,000

Provisions:

1. In order to improve equal access and the fair administration of justice, the funds appropriated in Schedule (8) are to be distributed by the Judicial Council through the Legal Services Trust Fund Commission to qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used for legal services in civil matters for indigent persons. The Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. Ten percent of the funds in Schedule (8) 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 in Schedule (8) 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. [...]

[....]

SEC. 10. Item 0250-101-0932 of Section 2.00 of the Budget Act of 2009 is amended to read:

0250-101-0932--For local assistance, Judicial Branch, payable from the Trial Court Trust Fund 2,943,158,000

Schedule:

- (1) 45.10-Support for Operation of the Trial Courts..... 2,517,940,000
- (2) 45.25-Compensation of Superior Court Judges..... 296,205,000
- (3) 45.35-Assigned Judges..... 26,047,000
- (4) 45.45-Court Interpreters 92,794,000
- (5) 45.55.060-Court Appointed Special Advocate (CASA) Program 2,292,000
- (6) 45.55.065-Model Self-Help Program 991,000
- (7) 45.55.090-Equal Access Fund Program 5,685,000**
- (8) 45.55.095-Family Law Information Centers 357,000
- (9) 45.55.100-Civil Case Coordination 848,000
- (10) 97.20.001- Unallocated Reduction 0
- (11) Reimbursements..... -1,000

Provisions:

1. Notwithstanding Section 26.00, the funds appropriated or scheduled in this item may be allocated or reallocated among categories by the Judicial Council.

[....]

5. Upon order of the Director of Finance, the amount available for expenditure in this item may be augmented by the amount of any additional resources available in the Trial Court Trust Fund, which is in addition to the amount appropriated in this item. Any augmentation shall be authorized no sooner than 30 days after notification in writing to the chairpersons of the committees in each house of the Legislature that consider appropriations, the chairpersons of the committees and appropriate subcommittees that consider the State Budget, and the Chairperson of the Joint Legislative Budget Committee, or not sooner than whatever lesser time the chairperson of the joint committee or his or her designee may determine.

6. Notwithstanding any other provision of law, upon approval and order of the Director of Finance, the amount appropriated in this item shall be reduced by the amount transferred in Item 0250-115-0932 to provide adequate resources to the Judicial Branch Workers' Compensation Fund to pay workers' compensation claims for judicial branch employees and judges, and administrative costs pursuant to Section 68114.10 of the Government Code.

7. Of the funds appropriated in Schedule (1), which will be transferred to the Trial Court Improvement Fund in accordance with subdivision (b) of Section 77209 of the Government Code, up to \$5,000,000 shall be available for support of services for self- represented litigants.

[....]

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

10. Funds available for expenditure in Schedule (7) may be augmented by order of the Director of Finance by the amount of any additional resources deposited for distribution to the Equal Access Fund Program in accordance with Sections 68085.3 and 68085.4 of the Government Code. Any augmentation under this provision shall be authorized not sooner than 30 days after notification in writing to the chairpersons of the committees in each house of the Legislature that consider appropriations, the chairpersons of the committees and appropriate subcommittees that consider the State Budget, and the Chairperson of the Joint Legislative Budget Committee, or not sooner than whatever lesser time the chairperson of the joint committee, or his or her designee, may determine.

[....]

SEC. 582. This act addresses the fiscal emergency declared by the Governor by proclamation on July 1, 2009, pursuant to subdivision (f) of Section 10 of Article IV of the California Constitution.

SEC. 583. This act is an urgency statute necessary for the immediate preservation of the public peace, health, or safety within the meaning of Article IV of the Constitution and shall go into immediate effect. The facts

constituting the necessity are: This act makes revisions in appropriations for the support of the government of the State of California and for several public purposes for the 2009-10 fiscal year. It is imperative that these revisions be made effective as soon as possible. It is therefore necessary that this act go into immediate effect.

[...]

2009-2010 PARTNERSHIP GRANTS WITH PROGRAM DESCRIPTIONS

PROGRAM LEGAL NAME	PROJECT NAME	COUNTY	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED AWARD
BAY AREA LEGAL AID	<i>Domestic Violence Restraining Order Clinic</i>	San Mateo	Sixth year	Clinic staff assist pro per drop-ins filing or responding to domestic violence related restraining order applications to complete the application, and review pleadings. (Order drafting component has been discontinued in anticipation of automated court system.) Workshops are available to evaluate petitioners. FLF provides commensurate services for respondents.	\$40,713
BET TZEDEK LEGAL SERVICES	<i>Elder Law Project</i>	Los Angeles	Fourth year	This project operates out of four courthouses, including the Stanley Mosk Courthouse in Downtown LA, Norwalk, Torrance and Van Nuys. Project staff assist seniors, the disabled, and their families with conservatorships and elder abuse restraining orders.	\$101,703
CALIFORNIA RURAL LEGAL ASSISTANCE	<i>Landlord/Tenant and Small Claims Pro Per Assistance Project</i>	San Joaquin	Fifth year	The Court Administration Building is the site for this project in which a paralegal provides legal information on the judicial process specific to landlord-tenant and small claims cases. 1:1 assistance in forms completion, increased low-income landlord access to legal services.	\$56,703
CALIFORNIA RURAL LEGAL ASSISTANCE, INC.	<i>Stanislaus County Landlord/Tenant Pro Per Clinic</i>	Stanislaus	Second year	This project is a replication of the successful San Joaquin (Stockton) clinic. It is located in an annex to the CRLA Modesto office. A paralegal provides legal information on the judicial process specific to landlord-tenant and small claims cases. 1:1 assistance in forms completion, increased low-income landlord access to legal services.	\$61,703
CENTRAL CALIFORNIA LEGAL SERVICES, INC.	<i>Elder Abuse Access to Justice Partnership</i>	Fresno	New Project	Litigants on either side of an elder abuse TRO matter can receive forms assistance and information, and general hearing and advocacy tips. A volunteer organization will coordinate to assist elders in physically navigating to and through the courthouse	\$56,703

CONTRA COSTA SENIOR LEGAL SERVICES	<i>Senior Self Help Clinic</i>	Contra Costa	Second year	Assisting seniors in conjunction with the "elder court" calendar, information and assistance will be provided on elder abuse TROs, consumer protection, credit disputes and financial issues.	\$29,703
EAST BAY COMMUNITY LAW CENTER	<i>Consumer Law Clinic</i>	Alameda	New project	This project seeks to address those most impacted by the consumer debt crisis by offering (1) community education presentations, materials and counseling and case management pro per assistance, counseling consumers multiple times until the legal matters are resolved.	\$51,703
ELDER LAW & ADVOCACY	<i>Bilingual Conservatorship Clinic</i>	Imperial	Second year	An attorney provides information, education and forms assistance to persons seeking conservatorships or alternatives thereto from a courthouse location. Services will also include grandparent guardianship assistance.	\$41,703
GREATER BAKERSFIELD LEGAL ASSISTANCE, INC.	<i>Family Law Access Project</i>	Kern	Third year	Indigent pro per litigants with legal issues related to child custody, visitation and support matters are prepared for their hearings in the courtroom. Services will be provided through a series of three workshops to be conducted weekly, individual appointments for litigants who need additional assistance with completing required forms and a training video on "How to Present Your Case in Court."	\$61,703
INLAND COUNTIES LEGAL SERVICES	<i>Blythe Legal Information/ Advocacy Partnership Project</i>	Riverside	New project	This project proposes to assist low-income, semi-literate, LEP consumers in the easternmost portion of Riverside County. Services consist of providing education about the rights and responsibilities, role of the court, explaining court procedures, preparing and reviewing forms and documents, preparing court declarations, making appropriate referrals.	\$11,603
LEGAL AID FOUNDATION OF LOS ANGELES	<i>Torrance Self-Help Legal Access Center</i>	Los Angeles	Third year	This project provides small group or 1:1 assistance in the areas of family law, landlord-tenant law, civil harassment, debt collection and torts.	\$41,703

LEGAL AID FOUNDATION OF SANTA BARBARA COUNTY	<i>Legal Resource Center in Lompoc</i>	Santa Barbara	Third year	This project functions as a walk-in information and assistance center for self-represented litigants. Project staff will offer 1:1 consultations, providing general legal information and/or information regarding court procedures. Staff will also provide assistance with completion of legal forms and applications.	\$71,703
LEGAL AID SOCIETY OF ORANGE COUNTY	<i>Central Justice Center Self-Help Center</i>	Orange	Second year	A legal services attorney augments existing court staffing of one attorney and one paralegal, to provide information and assistance on issues related to UD's, civil harassment, fee waivers, small claims, etc. I-CAN! access is available; workshops for UD defendants are offered weekly.	\$66,703
LEGAL AID SOCIETY OF SAN DIEGO, INC.	<i>Civil Harassment Temporary Restraining Order Program (East County Courthouse)</i>	San Diego	Third year	This proposal expands existing civil TRO assistance on a FLF model, with quarterly community outreach and after-service memos on court processes. Areas of focus include neighbor disputes, failed romances, and assisting juvenile or adult children. Written materials in English and Spanish; translation assistance in Arabic.	\$61,703
LEGAL AID SOCIETY OF SAN DIEGO, INC.	<i>Unlawful Detainer Assistance Program-South County Courthouse</i>	San Diego	Second year	Focused on significantly monolingual communities, this fully bilingual clinic will assist with UD actions for low-income plaintiffs and defendants, fee waivers, and service assistance. All documents will be translated. Outreach is conducted as well.	\$66,703
LEGAL AID SOCIETY OF SAN MATEO COUNTY	<i>San Mateo County Landlord/Tenant Clinic</i>	San Mateo	Second year	This project provides services in landlord/tenant matters. Self-represented litigants who visit the clinic are provided with pleadings, which can then be filed with the court in the same building. A primary objective is to reduce the incidence of involuntary displacement and homelessness due to default judgments. All services are available in English and Spanish.	\$46,703
LEGAL ASSISTANCE FOR SENIORS	<i>Partnership to Assist Guardianship Litigants</i>	Alameda	Second year	Low-income and indigent litigants are given help with the procedural requirements of guardianship. This program will serve petitioners of any age regardless of relationship to the minor child.	\$61,703

LEGAL SERVICES OF NORTHERN CALIFORNIA	<i>Consumer Advice Clinic</i>	Yolo	New proposal	With the county superior court, in collaboration with the FLF and SHC, LSNC proposes to provide this clinic to alleviate the void in legal services for self-represented litigants with consumer-related problems, better prepare them to represent themselves or resolve problems before trial, steer them toward long-term solutions.	\$56,703
LEGAL SERVICES OF NORTHERN CALIFORNIA	<i>Self-Help Legal Access Center</i>	Mendocino	Fourth year	This project assists self-represented litigants fill out and file necessary forms, and provides assistance drafting orders and motions regarding guardianships, small claims, domestic violence, elder abuse, civil harassment and family law.	\$51,703
LEGAL SERVICES OF NORTHERN CALIFORNIA	<i>Legal Information and Assistance Project</i>	Shasta, Lassen, Siskiyou, Trinity	Seventh year	This project assists low-income self-represented civil law litigants in four remote counties. Services are provided in a clinic setting focusing on assisting consumers understand state and local civil law requirements and procedures on filing, and responding to pleadings, meeting service and notice requirements, and filing and obtaining enforceable orders after hearing. A mediation clinic assists litigants with parenting plans and expungements.	\$24,703
LEGAL SERVICES OF NORTHERN CALIFORNIA	<i>Solano County Restraining Order Clinic (SCROC)</i>	Solano	Fourth year	Direct personal assistance is provided to low-income pro per litigants seeking domestic violence or civil harassment restraining orders, and assistance with elder abuse and workplace violence. Services are provided from an office at the Vallejo courthouse.	\$51,703
LOS ANGELES CENTER FOR LAW AND JUSTICE	<i>Help with Orders Prepared for Enforcement</i>	Los Angeles	New proposal	LACLJ plans to create a project to assist self-represented litigants with obtaining signed, enforceable copies of court orders issued in their family law cases. LACLJ's staff attorney and JusticeCorps volunteers will act as the court's scriveners to prepare Judgments and Orders After Hearings.	\$66,703
NEIGHBORHOOD LEGAL SERVICES OF LOS ANGELES COUNTY	<i>Domestic Abuse Self-Help Project (DASH)</i>	Los Angeles	Fifth year	This project provides legal information and assistance with document preparation to Petitioners and Respondents in domestic violence cases. DASH provides general information applicable to all domestic violence litigants.	\$46,703

NEIGHBORHOOD LEGAL SERVICES OF LOS ANGELES COUNTY	<i>San Gabriel Valley Self-Help Legal Access Center</i>	Los Angeles	Second year	This project expands access to court services in the Pasadena Courthouse. This hybrid model is a partnership between the Court, the local bar associations, legal services and educational institutions. The range of services includes individual assistance, workshops, clinics, computer assistance and self-help materials. Services are provided in English, Spanish and Mandarin.	\$66,703
PRO BONO PROJECT SILICON VALLEY	<i>Domestic Violence Self-Representation Assistance</i>	Santa Clara	Fourth Year	Separate workshops are held in courtrooms for petitioners and respondents, preparing them to present their cases at the restraining order hearing and informing them of the ramifications after hearing. Volunteer attorneys staff the workshops.	\$16,703
PUBLIC COUNSEL	<i>Appellate Self-Help Clinic</i>	Los Angeles	Fourth year	This clinic, situated at the Court of Appeal in downtown Los Angeles, provides technical assistance, brief counsel and advice to pro se litigants. If appropriate, litigants are referred for pro bono representation.	\$51,703
PUBLIC LAW CENTER	<i>Orange County Courthouse Guardianship Clinic</i>	Orange	Second year	The Orange County Courthouse Guardianship Clinic is a coordinated effort between PLC, the Orange County Superior Court and the Orange County Bar Association. The clinic offers self-represented parties pro bono assistance dealing with the legal process surrounding guardianship proceedings.	\$38,703
SAN DIEGO VOLUNTEER LAWYER PROGRAM	<i>North County Civil Harassment Restraining Order Clinic</i>	San Diego	Second year	Clinic provides civil harassment advice and assistance for all stages of the process, from completing the petition to hearing procedures. Spanish language capacity on staff.	\$66,703

SENIOR CITIZENS' LEGAL SERVICES	<i>Conservatorship & Elder Abuse Project (CEAP)</i>	Santa Cruz	Third year	<p>This project provides legal assistance, education and referral services to litigants seeking conservatorships and elder abuse restraining orders. Staff will also assist litigant's complete required probate and local forms for conservatorships and guardianships.</p> <p>Expansion to include assistance to customers seeking guardianships is proposed on an additional day in Santa Cruz..</p>	\$53,703
THE WATSONVILLE LAW CENTER	<i>Language Access Project</i>	Santa Cruz	New proposal	<p>This project provides the Spanish-speaking community with access to the courts in a collaborative partnership between the court's Self-Help Center and Watsonville Law Center by providing outreach and community education presentations and 1 full-time and 1 part-time on-site bilingual paralegals to assist community members obtain legal information and fill out court forms and pleadings, addressing language, cultural and literacy needs.</p>	\$91,703
TOTAL					16,250,000

**THE LEGAL SERVICES TRUST FUND PROGRAM
EQUAL ACCESS FUND – PARTNERSHIP GRANTS
2010 REQUEST FOR PROPOSAL**

FOR ALL APPLICANTS

FORM A – PROJECT ABSTRACT

1. **Project Title:** _____

2. **Program Name:** _____

Program Contact: _____

Phone #: _____

E-mail: _____

3. **Amount Requested: \$** _____

4. **Cooperating Court(s)*:** _____

Address, City, Zip: _____

Presiding Judge: _____

Phone #: _____

E-mail: _____

**Other Court Contact
and Title:** _____

Phone #: _____

E-mail: _____

* If more than one court is cooperating on this project, provide additional information on a separate sheet.

5. **Current Recipient of Partnership Grant?** Yes No

Previous grant amounts (for this project only): 2004: _____

2005: _____

2006: _____

2007: _____

2008: _____

2009: _____

Partnership Grant funds remaining as of August 31, 2009: _____

(Abstract: Partnership Grant RFP Form A, page 2:)

- 6. Summary.** Provide a description of the core aspects of your proposed project. (Please limit this description to one page.)

**THE LEGAL SERVICES TRUST FUND PROGRAM
EQUAL ACCESS FUND – PARTNERSHIP GRANTS
2010 REQUEST FOR PROPOSAL**

FOR ALL APPLICANTS

FORM B – PROJECT NARRATIVE

Program Name: _____

Project Title: _____

[See pages 5 through 10 of the Request for Proposal INSTRUCTIONS for an explanation of how to complete this Project Narrative and a list of the subjects to be addressed.]

**THE LEGAL SERVICES TRUST FUND PROGRAM
EQUAL ACCESS FUND – PARTNERSHIP GRANTS
2010 REQUEST FOR PROPOSAL**

FOR ALL APPLICANTS

FORM C – PROJECT ASSURANCES

Program Name: _____

Project Title: _____

Applicant assures compliance with the following:

1. Applicant agrees it will use any grant funds it receives from the Partnership Grants portion of the Equal Access Fund only for purposes allowed under the State Budget Act of 2009, upon approval thereof, and any grant agreement it enters into with the Legal Services Trust Fund Program.
2. Applicant agrees to expend any grant funds solely on civil legal assistance to indigent self-represented litigants in California courts.
3. Applicant will not discriminate on the basis of race, color, national origin, religion, gender, handicap, age or sexual orientation.
4. Applicant will comply with quality control procedures adopted by the State Bar.
5. Applicant will permit reasonable site visits or present additional information deemed reasonably necessary to determine compliance with the terms of a grant under the Partnership Grants portion of the Equal Access Fund.
6. Applicant will comply with fiscal management and control procedures adopted by the State Bar.
7. Applicant agrees to consult with the Legal Services Trust Fund Program concerning media coverage of any project funded by a Partnership Grant.
8. Applicant understands that any proposal submitted for a Partnership Grant, and all documents submitted pursuant to issuance of a Partnership Grant, are public documents and may be disclosed to any person.
9. Applicant assures that, to the extent this grant is being sought for an existing project, the funds will be in addition to and will not supplant current funding committed to that project. However, to the extent applicant seeks to move some of the funding already committed to the self-help center for use on other activities, then applicant will submit to the Commission an explanation of the need for the other activities, justifying moving some of the previously-committed funds from the existing self-help center.

(Assurances: Partnership Grant RFP Form C, page 2:)

10. Applicant agrees it will cooperate with data collection processes or with research efforts of the Legal Services Trust Fund Program or the Administrative Office of the Courts to evaluate the Partnership Grants Program.

Signed:

Executive Director
Applicant Program

Chair, Board of Directors
Applicant Program

Date

Date

**THE LEGAL SERVICES TRUST FUND PROGRAM
 EQUAL ACCESS FUND - PARTNERSHIP GRANTS
 2010 REQUEST FOR PROPOSAL
 FOR ALL APPLICANTS**

FORM D - PROJECT BUDGET

1. Program Name:			
Project Title:			
2. Prepared by:			
E-mail:		Phone/Ext:	

ACCOUNT TITLE	PROPOSED PARTNERSHIP GRANT	OTHER TRUST FUND MONIES	NON-TRUST FUND MONIES	TOTAL	IN-KIND CONTRIBUTIONS (IF ANY)*
Personnel					
3. Lawyers					
4. Paralegals					
5. Other Staff					
6. SUBTOTAL					
7. Employee Benefits					
8. TOTAL PERSONNEL					
Non-Personnel					
9. Space					
10. Equipment Rental & Maintenance					
11. Supplies, Printing & Postage					
12. Telecommunications					
13. Travel					
14. Training					
15. Library					
16. Insurance					
17. Audit					
18. Evaluation					
19. Capital Additions					
20. Contract Service to Clients					
21. Contract Service to Organization					
22. Other					
23. TOTAL NON-PERSONNEL					
24. TOTAL					
25. Projected Carry-over Funds					
26. Total Amount of Funds Available					

* In-Kind Contributions will not be added to the "Total" column.

**THE LEGAL SERVICES TRUST FUND PROGRAM
EQUAL ACCESS FUND – PARTNERSHIP GRANTS
2010 REQUEST FOR PROPOSAL**

FOR ALL APPLICANTS

FORM E - BUDGET NARRATIVE

Program Name: _____

Project Title: _____

[See pages 11 through 13 of the Request for Proposal INSTRUCTIONS for an explanation of how to complete this Budget Narrative and for explanations of the expense categories listed on Form D.]

**THE LEGAL SERVICES TRUST FUND PROGRAM
EQUAL ACCESS FUND – PARTNERSHIP GRANTS
2010 REQUEST FOR PROPOSAL
FOR ALL APPLICANTS**

FORM F – SUPPORT FROM COOPERATING COURT

Program Name: _____

Project Title: _____

A. Letter of Support:

Attach a Letter of Support signed by the **Presiding Judge** of the court(s) cooperating on the proposed project. If the project is serving one side only, the court's letter must confirm its support for such a program and clearly indicate that it understands the nature of the planned services.

Status of Letter:

- Signed by Presiding Judge and attached
- Will be sent to Trust Fund Program no later than January 29, 2010

B. Memorandum of Understanding:

All applicants must provide a copy of a formal agreement with the cooperating court setting forth the duties and responsibilities of each party as regards this project. This agreement should reflect all financial or in-kind support to be provided by each party, and all logistical and administrative matters reflected in the proposal.

New Projects: A Memorandum of Understanding with the cooperating court need not be included with the submission of a completed RFP for a **new project**. However, successful applicants must submit a fully-executed MOU to the Trust Fund Program no later than January 29, 2010. Grant funds will not be disbursed without receipt of a fully-executed agreement.

Continuing Projects: For **continuing projects**, attach a copy of the Memorandum of Understanding now in effect. Identify any changes proposed for the upcoming term of the agreement and the reasons for such changes. Revised MOU's may be submitted subsequent to the Commission's approval of a Partnership Grant, but no later than January 29, 2010.

Status of MOU:

- Fully executed and attached
- Enclosed draft to be executed and provided to the Trust Fund Program by _____
- To be drafted, executed and provided to the Trust Fund Program by _____

**LEGAL SERVICES TRUST FUND COMMISSION
PARTNERSHIP GRANTS COMMITTEE
2009-2010**

Hon. Maria Rivera, Chair*

Justice of the First District Court of Appeal
350 McAllister Street
San Francisco, CA 94102
ph: (415) 865-7240
fax (415) 865-7309
e-mail: rivera@jud.ca.gov

Monica Mitchell*

Supervising Attorney
Superior Court of California, County of San Bernardino
655 W. 2nd SL, 2nd Floor
San Bernardino, CA 92415
ph: (909) 386-9161
e-mail: mmitchell@courts.sbcounty.gov

Donna Hershkowitz *

Assistant Director, Office of Governmental Affairs
Judicial Council-Admin. Office of the Courts
770 L Street, Suite 700
Sacramento, CA 95814
ph: (916) 323-3121
fax: (916) 323-4347
e-mail: donna.hershkowitz@jud.ca.gov

Ellen Pirie*

County of Santa Cruz
701 Ocean Street, Room 500
Santa Cruz, CA 95060
ph: (831) 454-2200
fax: (831) 454-3262
e-mail: ellen.pirie@co.santa-cruz.ca.us

David Lash*

O'Melveny & Myers LLP
400 S. Hope Street
Los Angeles, CA 90071
ph: (213) 430-8366 fx: (213) 430-6407
e-mail: dlash@omm.com

Barry Tucker

Foley & Lardner LLP
402 W. Broadway, 23rd Floor
San Diego, CA 92101
ph: (619) 685-4653 fx: (619) 234-3510
e-mail: btucker@foley.com

Kathleen Meehan

Department of Justice
Office of the Attorney General
2550 Mariposa Mall, Room 5090
Fresno, CA 93721
ph: (559) 477.1679 fx: (559) 445.5106
e-mail: Kathleen.Meehan@doj.ca.gov

Tania Ugrin-Capobianco*

Superior Court of California, County of El Dorado
2850 Fairlane Court, Building C
Placerville, CA 95667
ph: (530) 621-5155 fx: (530) 295-2536
e-mail: tania@eldoradocourt.org

*Members appointed by the Chair of the Judicial Council.

EVALUATION FORM - PARTNERSHIP GRANTS

NAME OF APPLICANT:

COUNTY(IES):

NAME OF EVALUATOR:

DATE:

TYPE OF PROJECT (Check all that apply):

- _____ GENERAL CIVIL
- _____ FAMILY LAW
- _____ GUARDIANSHIP
- _____ LANDLORD/TENANT
- _____ OTHER:

BASIC REQUIREMENTS:

Yes	No	
_____	_____	Legal services trust fund program recipient.
_____	_____	Joint court/legal services project located at or near the courthouse.
_____	_____	Indigent clients/screening mechanism described.
_____	_____	Self-represented litigants (no court appearances anticipated with these funds).
_____	_____	State court.

DISCRETIONARY CRITERIA

For the following criteria, please rank on a scale of 1 to 5, with 1 being inadequate, 3 being adequate, and 5 being an outstanding response. The relevant Section in applicant's Project Narrative is listed below. **Evaluate the responses based on experience and performance to date as well as plans for the future. Applicants should describe any changes they intend to make in the project, but should not include changes that would require additional Partnership Grant funds.**

- _____ PROGRAM'S QUALIFICATIONS (Section 1) Adequate expertise? Experience operating pro per projects? Success in this project so far?

- _____ NEEDS ASSESSMENT/GOALS AND OBJECTIVES (Sections 2,3) Clearly meeting an unmet client need? Services needed on an ongoing basis? Rationale for project design? Clear goals? Adequate involvement of others in goal setting?

- _____ TYPES OF SERVICES/RESOURCES (Section 4) Clear description of services? Proposed changes adequately explained? Resources described?

- _____ FINANCIAL ELIGIBILITY AND SUBJECT MATTER SCREENING (Sections 5) Adequate systems to verify income eligibility? Subject matter?

- _____ CONFLICT CHECKING/RELATIONSHIP WITH LITIGANT (Section 6) Clear communication about whether an attorney-client relationship is established? Adequate methods for checking conflicts? Complete explanation why limiting services to one side? Letter from Presiding Judge reflecting his/her clear understanding of the implications of serving only one side?

- _____ REFERRAL PROTOCOLS (Section 7) Clear description of procedures, protocols ensuring meaningful referrals? Commitments, arrangements agreed to by other entities? Conflict panel? Other info or materials provided to ineligible litigants?

- _____ STAFF, TRAINING AND SUPERVISION (Section 8) Adequate plans for training and supervision, especially if supervisor is not on-site?

- _____ SITE AND ACCESSIBILITY/TECHNOLOGY AND EQUIPMENT (Sections 9 and 10) Adequate site? Adequate equipment, including technology? Services physically accessible, culturally competent, bilingual, etc.? Plans to overcome distance barriers?

- _____ EVALUATION (Section 11) Clear description of evaluation systems and successful evaluations. Plans for changes and improvements as needed? Input from both the program and the court available?

- _____ TIMETABLE. (Sections 12) Proposed timetable? Quarterly plans?

- _____ CONTINUITY AND OTHER FUNDING AND SUPPORT. (Section 13) Complete and clear plans for and/or success in leveraging Partnership Grant funds to obtain other funding? Inclusion of program's own operating revenue? List of additional funds and amounts provided? Description of extraordinary circumstances, challenges limiting fundraising success?

- _____ COLLABORATIVE PLANNING WITH PARTNERS AND THE COURTS (Sections 14 and 15) Adequately address collaboration with cooperating court (and with Family Law Facilitator, if applicable) and other service providers? Describes plans to avoid confusion for pro per users of services?

_____ CLEAR ABILITY TO PERFORM HIGH QUALITY WORK ON ONGOING BASIS
(from overall narrative)

TOTAL NUMBER OF POINTS: _____

CHECKLIST OF ISSUES ADDRESSED WITH COOPERATING COURT:

- _____ Assurance of Court's impartiality and independence.
- _____ Ongoing coordination.
- _____ Clear distinction between parts of delivery system.
- _____ Services provided, information and referrals.
- _____ Security.
- _____ Location/hours.
- _____ Equipment/supplies.
- _____ Shared space.
- _____ Project continuity.
- _____ Evaluation.

OVERALL COMMENTS:

SUGGESTED GRANT CONDITION(S):

MORE INFORMATION READER WOULD LIKE:

EVALUATION FORM - PARTNERSHIP GRANTS

For Staff ONLY: CHECKLIST FOR FORMS AND ATTACHMENTS

- Assurances signed
- Support letter submitted from presiding judge including court's understanding of all the implications presented serving one side/party.
- Complete budget.
- Budget attached for existing project, if any.
- Complete budget narrative, matches project narrative.

Comments:

- Grant level requested seems reasonable for project.
- Comments: