



Judicial Council of California . Administrative Office of the Courts

455 Golden Gate Avenue · San Francisco, California 94102-3688

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REPORT TO THE JUDICIAL COUNCIL

For business meeting on: December 14, 2010

Title	Agenda Item Type
Equal Access Fund: Distribution of Funds for Partnership Grants	Action Required
Rules, Forms, Standards, or Statutes Affected	Effective Date
N/A	December 14, 2010
Recommended by	Date of Report
State Bar Legal Services Trust Fund Commission	November 26, 2010
David Hopmann, Cochair	Contact
David Lash, Cochair	Bonnie Rose Hough, 415-865-7668 bonnie.hough@jud.ca.gov

Executive Summary

The State Bar Legal Services Trust Fund Commission has submitted a report on the distribution of Equal Access Fund partnership grants. In that report, the commission requests that the Judicial Council approve the distribution of \$2 million according to the statutory formula set out in the State Budget. For the last 10 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 14, 2010, approve the allocation of \$2 million 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 to provide legal assistance to self-represented litigants:

Asian Pacific American Legal Center	
Asian Language Self-Help Family Law Workshops	\$50,000
Bet Tzedek Legal Services	
Elder Law Project	\$145,000
California Rural Legal Assistance	
San Joaquin County Landlord/Tenant and Small Claims Pro Per Assistance Project.....	\$55,000
Stanislaus County Landlord/Tenant Pro Per Clinic	\$70,000
Central California Legal Services, Inc.	
Fresno County Elder Abuse Access to Justice Partnership	\$85,000
Tulare County Elder Abuse Protection Partnership	\$55,000
Contra Costa Senior Legal Services	
Senior Self-Help Clinic.....	\$31,000
East Bay Community Law Center	
Consumer Law Clinic	\$50,000
Elder Law and Advocacy	
Imperial County Bilingual Conservatorship/Guardianship Clinic	\$80,000
Family Violence Law Center	
Alameda County Domestic Violence Self-Representation Assistance	\$25,000
Greater Bakersfield Legal Assistance, Inc.	
Kern County Orders Project	\$80,000
Legal Aid Foundation of Los Angeles	
Santa Monica Self-Help Legal Access Center.....	\$45,000
Legal Aid Foundation of Santa Barbara County	
Legal Resource Center in Lompoc	\$90,000
Legal Aid Society of Orange County	
Central Justice Center Self-Help Center.....	\$65,000
Legal Aid Society of San Diego, Inc.	
Civil Harassment Temporary Restraining Order Clinic	\$55,000
Unlawful Detainer Assistance Program, South County Courthouse	\$65,000

Legal Aid Society of San Mateo County	
San Mateo County Landlord/Tenant Clinic	\$45,000
Legal Assistance for Seniors	
Partnership to Assist Guardianship Litigants.....	\$60,000
Legal Services of Northern California	
Yolo County Consumer Assistance Clinic	\$50,000
Mendocino County Self-Help Legal Access Center	\$50,000
Shasta Legal Information and Assistance Program	\$25,000
Solano County Restraining Order Clinic	\$45,000
Los Angeles Center for Law and Justice	
Help With Orders Prepared for Enforcement Project.....	\$60,000
Neighborhood Legal Services of Los Angeles County	
San Fernando Civil Harassment Project	\$90,000
San Gabriel Valley Self-Help Legal Access Center	\$90,000
Pro Bono Project Silicon Valley	
Family Court Settlement Project.....	\$57,000
Public Counsel	
Appellate Self-Help Clinic.....	\$45,000
Public Law Center	
Orange County Courthouse Guardianship Clinic	\$38,000
Public Service Law Corporation of Riverside County	
Inland Empire Expungement Project.....	\$50,000
San Diego Volunteer Lawyer Project	
North County Civil Harassment Restraining Order Clinic	\$65,000
San Francisco Bar Volunteer Legal Services	
Family Law Assisted Self-Help (FLASH) Project	\$50,000
Senior Citizens' Legal Services	
Conservatorship and Elder Abuse Project.....	\$54,000
Watsonville Law Center	
Language Access to Court Project.....	\$80,000

Total\$2,000,000

The text of the commission’s report and attachments are found at pages 7–56.

Previous Council Action

The Judicial Council has approved the proposed distribution for each of the past 11 years based on the recommendations of the Legal Services Trust Fund Commission.

Rationale for Recommendation

Each year the budget-control language requires the Judicial Council to distribute the Equal Access Fund monies to legal services providers through the State Bar Legal Services Trust Fund Commission.¹ The State Bar created the commission to administer the law regulating attorneys’ interest-bearing (IOLTA) trust accounts. (Bus. & Prof. Code, § 6210 et seq.; State Bar Rules Regulating Interest-Bearing Trust Fund Accounts for the Provision of Legal Services to Indigent Persons, 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”² 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, 2012.

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.

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 council approved that distribution on August 27, 2010. The remaining 10 percent of the funds are to be distributed as partnership grants to legal services programs for programs conducted jointly with the courts to provide legal

¹ Sen. Bill 870 (Stats. 2010, ch. 712, pp. 21–25); Assem. Bill X4 1 (Stats. 2009, ch. 1, pp. 18–22); Assem. Bill 1781 (Stats. 2008, ch. 268, pp. 32–36); Sen. Bill 77 (Stats. 2007, ch.171, pp. 40–42); Assem. Bill 1801 (Stats. 2006, ch. 47, pp. 26–30); Sen. Bill 77 (Stats. 2005, ch. 38, pp. 9–11); Sen. Bill 1113 (Stats. 2004, ch. 208, pp.16–17); Assem. Bill 1765 (Stats. 2003, ch. 157, pp. 11–12); Assem. Bill 425 (Stats. 2002, ch. 379, pp. 30–31); Sen. Bill 739 (Stats. 2001, ch. 106, pp. 73–74); Assem. Bill 1740 (Stats. 2000, ch. 52, pp. 78–79); Sen. Bill 160 (Stats. 1999, ch. 50, pp. 55–56).

² The Budget Act language is attached at page 14.

assistance to self-represented litigants. 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.

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, 2011.

Comments, Alternatives Considered, and Policy Implications

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

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.

Implementation Requirements, Costs, and Operational Impacts

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.

Relevant Strategic Plan Goals and Operational Plan Objectives

This recommendation helps implement Goal 1 of the Judicial Council's strategic plan, Access, Fairness, and Diversity, by increasing representation for low-income persons.

Attachments

1. Attachment A: Report of the State Bar Legal Services Trust Fund Commission



THE STATE BAR OF CALIFORNIA

LEGAL SERVICES TRUST FUND PROGRAM

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DATE: November 16, 2010

TO: The Judicial Council of California

FROM: David Lash, Co-Chair
David Hopmann, Co-Chair
Legal Services Trust Fund Commission

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 2010. 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. For the grant periods from 2006-07 through 2009-10, filing fee revenue distributed through the Equal Access Fund was \$4 million, \$5.7 million, \$5.4 million, and \$5.2 million, respectively. Current filing fee receipts support an allocation of \$5,685,000 in total grant year filing fee income for distribution in 2010-11. If actual filing fee receipts for 2010-11 exceed this sum, the excess will be included in the legal services grants for 2011-12.

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.

The Trust Fund's July 2010 report to this Council regarding the distribution of IOLTA-Formula Equal Access Fund Grants was produced prior to the finalization of the Budget Act and relied on estimates of total available funding, including some

filing fee revenue that had been received, but not distributed, in prior years. Based on projections, we recommended, and the Council approved at its July 16 meeting, \$20,000,000 in total Equal Access Fund funding for 2010-11. Any amount collected in excess of this amount will be distributed in the 2011-12 grant year.

Recommended 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 \$18,000,000.
- 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 \$2,000,000.
- Administrative costs, in a total amount up to \$812,500 are shared between the Judicial Council and the Trust Fund Commission.

The 2010-11 budget control language, setting forth the basis for apportioning available funds between administrative costs, IOLTA-Formula Equal Access Grants, and Partnership Grants, is provided in 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 \$2 million 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: Projects are located in both urban and rural areas, in larger and smaller counties, address different areas of law, and are comprised of both new and continuing projects.

In 2008, 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, 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 are also two projects that are being funded to continue services beyond their fifth year of service. In both cases these projects serve large and seriously under-resourced rural areas, and funding is being continued rather than terminated primarily because the utilization of reserved funds has made this possible without prejudice to other projects of lesser duration. The commission has requested that staff advise both projects that this continuation of funding is exceptional and should not be anticipated in future years.

As in past years, we sought and received proposals that span a wide range of substantive, procedural, technical and programmatic solutions. All are required to provide 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.
- A plan for an appropriate level of direct supervision of paralegals and other support staff by a qualified attorney.
- A plan to anticipate and meet the needs of litigants who are not within the legal services provider's service area or are ineligible for their services. 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.
- A plan to address the needs of unrepresented litigants who do not meet the financial eligibility requirements (e.g., by providing general information in the form of local information sheets, videos, workshops, etc.).
- A clearly stated policy regarding administration of financial eligibility standards, and established protocols to observe that policy.
- Protocols to minimize conflicts of interest, or to address them as needed, including: resources available to individuals who cannot be served for any reason; the relationship between the provider and the pro per litigant; and other similar issues.
- A plan for project continuity, including efforts to identify and secure additional funding within three years and to be free of Partnership support after five years.
- A multi-phase evaluation plan including such components as surveys, interviews, focus groups, courtroom observations, and file reviews, with a commitment to report on both qualitative and quantitative project results within three months of the end of the grant year.

Because all recipients of the Partnership Grants are organizations that already receive IOLTA Grants and IOLTA-Formula Equal Access Fund 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 are 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 non-voting judges. All of them participate actively in the commission's work, with each serving or having served on one of its three standing committees, which include the Eligibility and Budgets and Partnership Grants committees.

The Partnership Grants Committee is responsible for evaluating the partnership grant proposals and recommending proposals to the full commission. (The judges participate fully – and vote – during committee considerations; they participate fully but do not vote in full commission deliberations.) A list of the Partnership Grants 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 Trust Fund Program staff member providing background and conducting any necessary follow-up.

Committee members completed an evaluation form (Attachment E) to ensure that each proposal met the basic requirements and that key issues had been addressed by 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 met in evaluation teams to discuss specific concerns or issues with respect to any specific project. The full committee then met on October 26, 2010 to select successful proposals and settle upon tentative allocations based on individual and subcommittee evaluations. Staff contacted 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 October 26 meeting at the direction of the Partnership Grants Committee, were reviewed by the committee in conferences on November 10 and November 16, and subsequently presented to the commission for approval on November 16.

The commission is satisfied that all grant proposals represent well-conceived projects that warrant support with partnership grant funding.

Overview of Applications and Proposed Grants

For the \$2 million available in grants, the commission received 36 applications totaling \$2,554,063. The grant applications represent broad geographic diversity as

well as diversity in substantive areas of law and the nature of services to be provided. We received proposals for refunding from 24 of the 30 projects funded last year, proposals for eleven projects seeking first-time funding, and resumption of funding for one project that was initially funded from 2002 through 2004, but that has gone through significant restructuring in the six years since its Partnership Grant funding terminated. Most of the six projects that did not seek continuation funding were past their fifth year of Partnership Grant funding.

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 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:

ASIAN PACIFIC AMERICAN LEGAL CENTER
 Asian Language Self-Help Family Law Workshops..... \$50,000

BET TZEDEK LEGAL SERVICES
 Elder Law Project \$145,000

CALIFORNIA RURAL LEGAL ASSISTANCE
 San Joaquin County Landlord/Tenant and Small Claims Pro Per
 Assistance Project: \$55,000
 Stanislaus County Landlord/Tenant Pro Per Clinic \$70,000

CENTRAL CALIFORNIA LEGAL SERVICES, INC.
 Fresno County Elder Abuse Access to Justice Partnership \$85,000
 Tulare County Elder Abuse Protection Partnership \$55,000

CONTRA COSTA SENIOR LEGAL SERVICES
 Senior Self Help Clinic..... \$31,000

EAST BAY COMMUNITY LAW CENTER
 Consumer Law Clinic \$50,000

ELDER LAW AND ADVOCACY
 Imperial County Bilingual Conservatorship/Guardianship Clinic \$80,000

FAMILY VIOLENCE LAW CENTER
 Alameda County Domestic Violence Self-Representation
 Assistance \$25,000

GREATER BAKERSFIELD LEGAL ASSISTANCE, INC. Kern County Orders Project	\$80,000
LEGAL AID FOUNDATION OF LOS ANGELES Santa Monica Self-Help Legal Access Center.....	\$45,000
LEGAL AID FOUNDATION OF SANTA BARBARA COUNTY Legal Resource Center in Lompoc.....	\$90,000
LEGAL AID SOCIETY OF ORANGE COUNTY Central Justice Center Self-Help Center	\$65,000
LEGAL AID SOCIETY OF SAN DIEGO, INC. Civil Harassment Temporary Restraining Order Clinic..... Unlawful Detainer Assistance Program – South County Courthouse.....	\$55,000 \$65,000
LEGAL AID SOCIETY OF SAN MATEO COUNTY San Mateo County Landlord/Tenant Clinic.....	\$45,000
LEGAL ASSISTANCE FOR SENIORS Partnership to Assist Guardianship Litigants.....	\$60,000
LEGAL SERVICES OF NORTHERN CALIFORNIA Yolo County Consumer Advice Clinic..... Mendocino County Self Help Legal Access Center	\$50,000 \$50,000
Shasta Legal Information and Assistance Program	\$25,000
Solano County Restraining Order Clinic.....	\$45,000
LOS ANGELES CENTER FOR LAW AND JUSTICE Help with Orders Prepared for Enforcement Project	\$60,000
NEIGHBORHOOD LEGAL SERVICES OF LOS ANGELES COUNTY San Fernando Civil Harassment Project	\$90,000
San Gabriel Valley Self-Help Legal Access Center	\$90,000
PRO BONO PROJECT SILICON VALLEY Family Court Settlement Project.....	\$57,000
PUBLIC COUNSEL Appellate Self-Help Clinic.....	\$45,000
PUBLIC LAW CENTER Orange County Courthouse Guardianship Clinic	\$38,000

PUBLIC SERVICE LAW CORPORATION OF RIVERSIDE COUNTY	
Inland Empire Expungement Project.....	\$50,000
SAN DIEGO VOLUNTEER LAWYER PROJECT	
North County Civil Harassment Restraining Order Clinic	\$65,000
SAN FRANCISCO BAR VOLUNTEER LEGAL SERVICES	
Family Law Assisted Self-Help (FLASH) Project.....	\$50,000
SENIOR CITIZENS LEGAL SERVICES	
Conservatorship and Elder Abuse Project.....	\$54,000
THE WATSONVILLE LAW CENTER	
Language Access to the Court Project.....	\$80,000
TOTAL OF ALL PARTNERSHIP GRANT ALLOCATIONS:	
	\$2,000,000

Highlights of each of project are listed in Attachment B.

STATE BUDGET ACT: LANGUAGE RELEVANT TO THE EQUAL ACCESS FUND

BILL NUMBER: SB 870 (CHAPTERED)

CHAPTER 712
FILED WITH SECRETARY OF STATE OCTOBER 8, 2010
APPROVED BY GOVERNOR OCTOBER 8, 2010
PASSED THE SENATE OCTOBER 8, 2010
PASSED THE ASSEMBLY OCTOBER 7, 2010
AMENDED IN ASSEMBLY OCTOBER 7, 2010

INTRODUCED BY SENATOR DUCHENY, JANUARY 11, 2010

An act making appropriations for the support of the government of the State of California and for several public purposes in accordance with the provisions of Section 12 of Article IV of the Constitution of the State of California, and declaring the urgency thereof, to take effect immediately.

This bill would make appropriations for support of state government for the 2010-11 fiscal year. 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 1.00. This act shall be known and may be cited as the "Budget Act of 2010."

[....]

0250-101-0001--For local assistance,	
Judicial Branch.....	17,753,000
Schedule:	
(1) 45.10-Support for Operation of the Trial Courts	6,201,000
(2) 45.55-Grants.....	73,492,000
(3) Reimbursements	-59,665,000
(4) Amount payable from the Federal Trust Fund (Item 0250-101- 0890):	
.....	-2,275,000

Provisions:

1. In order to improve equal access and the fair administration of justice, of the funds appropriated in Schedule (2), \$10,776,000 is to be distributed 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. Of the \$10,776,000, 10 percent shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and 90 percent shall be distributed consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. The Judicial Council may establish additional reporting or quality control requirements consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code.

2. The amount appropriated in Schedule (1) is available for reimbursement of court costs related to the following activities: (a) payment of service of process fees billed to the trial courts pursuant to Chapter 1009 of the Statutes of 2002, (b) payment of the court costs payable under Sections 4750 to 4755, inclusive, and Section 6005 of the Penal Code, and (c) payment of court costs of extraordinary homicide trials.

0250-101-0890--For local assistance, Judicial Branch, for payment to Item 0250-101-0001, payable from the Federal Trust Fund2,275,000
 0250-101-0932--For local assistance, Judicial Branch, payable from the Trial Court Trust Fund3,150,394,000

Schedule:

(1) 45.10-Support for Operation of the Trial Courts 2,723,214
 ,000
 (2) 45.25-Compensation of Superior Court Judges298,516,000
 (3) 45.35-Assigned Judges26,047,000
 (4) 45.45-Court Interpreters.....92,794,000
 (5) 45.55-Grants.....9,824,000
 (6) Reimbursements -1,000

Provisions:

2. The funds appropriated in Schedule (2) shall be made available for costs of the workers' compensation program for trial court judges.

3. The amount appropriated in Schedule (3) shall be made available for all judicial assignments. Schedule (3) expenditures for necessary support staff may not exceed the staffing level that is necessary to support the equivalent of three judicial officers sitting on assignments.

4. The funds appropriated in Schedule (4) shall be for payments to contractual court interpreters, and certified and registered court interpreters employed by the courts for services provided during court proceedings and other services related to pending court proceedings, including services provided outside a courtroom, and the following court interpreter coordinators: 1.0 each in counties of the 1st through the 15th classes, 0.5 each in counties of the 16th through the 31st classes, and 0.25 each in counties of the 32nd through the 58th classes. For the purposes of this provision, "court interpreter coordinators" may be full- or part-time court employees, or those contracted by the court to perform these services. The Judicial Council shall set statewide or regional rates and policies for payment of court interpreters, not to exceed the rate paid to certified

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

5. Upon order of the Director of Finance, the amount available for expenditure in this item may be augmented by the amount of any additional resources available in the Trial Court Trust Fund, which is in addition to the amount appropriated in this item. Any augmentation must be approved in joint determination with the Chairperson of the Joint Legislative Budget Committee and shall be authorized not sooner than 30 days after notification in writing to the chairpersons of the committees in each house of the Legislature that consider appropriations, the chairpersons of the committees and appropriate subcommittees that consider the State Budget, and the chairperson of the joint committee, or not sooner than whatever lesser time the chairperson of the joint committee, or his or her designee, may determine. When a request to augment this item is submitted to the Director of Finance, a copy of that request shall be delivered to the chairpersons of the committees and appropriate subcommittees that consider the State Budget. Delivery of a copy of that request shall not be deemed to be notification in writing for purposes of this provision.

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

7. 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.

8. Upon approval by the Administrative Director of the Courts, the Controller shall transfer up to \$11,274,000 to Item 0250-001-0932 for recovery of costs for administrative services provided to the trial courts by the Administrative Office of the Courts.

9. In order to improve equal access and the fair administration of justice, of the funds appropriated in Schedule (5), \$5,685,000 is 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 of the Courts, the Controller shall transfer up to 5 percent of \$5,685,000 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 (5) 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.

11. Sixteen (16.0) subordinate judicial officer positions are authorized to be converted to judgeships in the 2010-11 fiscal year in the manner and pursuant to the authority described in subparagraph (B) of paragraph (1) of subdivision (b) of Section 69615 of the Government Code, as described in the notice filed by the Judicial Council under subparagraph (B) of paragraph (3) of subdivision (b) of Section 69615.

12. Notwithstanding any other provision of law, and upon approval of the Director of Finance, reimbursements in Schedule (6) may be increased by the amount of any additional resources collected for the recovery of costs for court-appointed dependency counsel services.

13. Upon approval of the Administrative Director of the Courts, the Controller shall transfer up to \$556,000 of the funding identified in Provision 12 of this item to Item 0250-001-0932 for administrative services provided to the trial courts in support of the court-appointed dependency counsel program.

14. This item includes a one-time augmentation of \$130,000,000 to offset the reductions in trial court funding in the 2010-11 fiscal year, to be transferred as follows: (a) \$25,000,000 shall be transferred from the State Court Facilities Construction Fund to the Trial Court Trust Fund, (b) \$73,400,000 shall be transferred from the Immediate and Critical Needs Account of the State Court Facilities Construction Fund to the Trial Court Trust Fund, and (c) the Judicial Council shall identify \$31,600,000 from the uncommitted fund balance in the Trial Court Trust Fund. Moneys from the Judicial Administration Efficiency and Modernization Fund and the Trial Court Improvement Fund may be transferred to the Trial Court Trust Fund, with specific amounts to be determined by the Judicial Council, if necessary to achieve the \$130,000,000 augmentation.

2010-2011 PARTNERSHIP GRANTS WITH PROGRAM DESCRIPTIONS

PROGRAM LEGAL NAME	PROJECT NAME	COUNTY	NEW OR RETURNING APPLICANT	DESCRIPTION	PROPOSED AWARD
ASIAN PACIFIC AMERICAN LEGAL CENTER	<i>Asian Language Self-Help Family Law Workshops</i>	Los Angeles	New	Lamoreaux Justice Center (LJC) currently offers family law workshops in English and Spanish. APALC will provide similar workshops in Vietnamese, and plans to expand to Korean or Chinese. APALC staff or volunteers will generate court forms for self-represented litigants to file. APALC staff will also assist Vietnamese-speaking litigants on Thursdays at LJC and one other day to be determined at West Justice Center.	\$50,000
BET TZEDEK LEGAL SERVICES	<i>Elder Law Project</i>	Los Angeles	Fifth year	<p>The Elder Law Project staff serves seniors, the disabled, and their families with same-day services, assisting in the preparation and filing of Elder and Dependent Adult Abuse petitions based upon information provided by litigants in a clinic-drafted questionnaire. It serves notices of hearings and reviews the court's minute orders. It also submits the Order Appointing Probate Conservator, has the letter issued and obtains certified copiers for all litigants with fee waivers in the "self-help plus" delivery model.</p> <p>\$70,000 of the funds are allocated to Bet Tzedek to share its model with other programs statewide. It will lead planning for a statewide conference on conservatorships, provide travel subsidies for participants, share best practices and provide continuing technical assistance to programs wishing to develop conservatorship programs in their counties. In particular, Bet Tzedek will help Central California Legal Services to add conservatorships to its elder abuse clinics.</p>	\$145,000

CALIFORNIA RURAL LEGAL ASSISTANCE	<i>Landlord/Tenant and Small Claims Pro Per Assistance Project</i>	San Joaquin	Sixth year	This clinic operates from a dedicated location in the San Joaquin County Superior Court. Two paralegals working under the supervision of CRLA attorneys provide legal information on the judicial process specific in landlord/tenant cases. Services include 1:1 assistance in forms completion; 1:1 assistance in understanding how to file an answer, complaint, other pleading or document; video presentations on the small claims court and unlawful detainer process.	\$55,000
CALIFORNIA RURAL LEGAL ASSISTANCE, INC.	<i>Stanislaus County Landlord/Tenant Pro Per Clinic</i>	Stanislaus	Third year	This landlord/tenant project was relocated to the Civil Division of the Stanislaus County Courthouse. Pro per litigants receive the following services and resources from the Clinic during business hours: information and how-to packets; standard form letters and pleading templates; Judicial Council forms, 1:1 assistance in understanding how to file an answer, complaint, other pleading or document; presentations on the small claims court and unlawful detainer process; referrals and other related information	\$70,000
CENTRAL CALIFORNIA LEGAL SERVICES, INC.	<i>Elder Abuse Access to Justice Partnership</i>	Fresno	Second Year	Project staff help petitioners complete the required forms to obtain a temporary restraining order and the necessary follow-up services to secure their permanent protective orders. Self-represented litigants will receive information on how to navigate the court system, how to prepare for court, specific considerations they are entitled to receive and the necessary measures to obtain an enforceable order after the hearing.	\$85,000

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CENTRAL CALIFORNIA LEGAL SERVICES, INC	<i>Elder Abuse Protection Partnership</i>	Tulare	New Project	Project staff will interview petitioner and respondent litigants, explaining the court process and their rights. Staff will assist petitioners complete the required forms to obtain a temporary restraining order and the necessary follow-up services to secure their permanent protective orders. Petitioners will learn of their right to police reports, available community resources to further meet their needs, and specific considerations they may be entitled to receive to obtain an enforceable order after the hearing. Project staff will work with Bet Tzedek to develop expertise to add conservatorships to their services.	\$55,000
CONTRA COSTA SENIOR LEGAL SERVICES	<i>Senior Self Help Clinic</i>	Contra Costa	Third year	This project will assist seniors in conjunction with the elder court calendar. Information and forms assistance will be provided on elder abuse TROs, consumer protection, credit disputes, financial issues and landlord-tenant issues. Seek to expand to conservatorships of the person on a facilitator-style model.	\$31,000
EAST BAY COMMUNITY LAW CENTER	<i>Consumer Law Clinic</i>	Alameda	Second Year	The Consumer Law Clinic offers training, counseling and materials that enable litigants to better handle their cases when sued by a debt collector, including tools that help guide litigants to negotiate settlements with collectors. With the court staff, the Clinic will also develop materials that give information and referrals so clients can receive reliable, non-predatory financial counseling. EBCLC attorneys and students will conduct 1:1 consultations and provide assistance to those who need additional help.	\$50,000
ELDER LAW & ADVOCACY	<i>Bilingual Conservatorship Clinic</i>	Imperial	Third year	The clinic offers information, education and forms assistance to persons seeking conservatorships and guardianships or alternatives. Participants receive an informational packet and/or forms to fill in and return to the clinic with the requested information. The staff attorney prepares and submits documents required such as orders, and mails required notices and will serve the proposed conservatee when present.	\$80,000

FAMILY VIOLENCE LAW CENTER	<i>Domestic Violence Self-Representation Assistance</i>	Alameda	New Project	The DVSRA Project is a collaborative project of Family Violence Law Center (FVLC), Volunteer Legal Services Corporation of the Alameda County Bar Association (VLSC), and the Self-Help Center of the Alameda County Superior Court (SHC). The DVSRA Project will provide paperwork assistance for pro per petitioners and respondents, specifically in the city of Hayward.	\$25,000
GREATER BAKERSFIELD LEGAL ASSISTANCE, INC.	<i>Kern County Orders Project</i>	Kern	New Project	This project will offer workshops and 1:1 assistance so that indigent pro pre litigants in family law cases obtain and understand their Order After Hearing and Judgment and proceed with next steps. GBLA will locate an experienced bicultural project paralegal inside the Court's Family Law Facilitator's Office to conduct workshops and to assist with preparing and filing necessary paperwork. With the court's cooperation, GBLA will also produce a video in English and Spanish that will be part of the workshop curriculum.	\$80,000
LEGAL AID FOUNDATION OF LOS ANGELES	<i>Santa Monica Self-Help Legal Access Center</i>	Los Angeles	New Project	The Self Help Center provides assistance with Family Law, civil complaints and harassment and unlawful detainer matters, and a growing number of requests for consumer and debt collection matters. LAFLA currently staffs the project with a full-time attorney and part-time paralegal.	\$45,000
LEGAL AID FOUNDATION OF SANTA BARBARA COUNTY	<i>Legal Resource Center in Lompoc</i>	Santa Barbara	Fourth year	This project functions as a walk-in information and assistance center for self-represented litigants. Project staff offers 1:1 consultations and general legal information to assist patrons prepare for court and understand the court processes and procedures. Staff also provides assistance with completion of legal forms and applications. One day per week bilingual assistance is provided by an LAFSB advocate.	\$90,000

LEGAL AID SOCIETY OF ORANGE COUNTY	<i>Central Justice Center Self-Help Center</i>	Orange	Third year	A legal services attorney augments existing court staffing of one attorney and one paralegal to provide information on court procedure and document preparation assistance on issues related to UD's, civil harassment, fee waivers, small claims, etc. LASOC's attorney also assists pro per litigants during the Procedural Assistance Calendar three times per week giving them the opportunity to have a staff member review their case status and provide procedural information. I-CAN! access is also available. Workshops are offered weekly.	\$65,000
LEGAL AID SOCIETY OF SAN DIEGO, INC.	<i>Civil Harassment Temporary Restraining Order Program (East County Courthouse)</i>	San Diego	Fourth year	This clinic provides FLF-like assistance to persons seeking and responding to civil harassment TROs. After-service memos on the civil restraining order process and timelines provided to litigants. Outreach and legal education are provided to community groups and law enforcement on CHTROs and alternatives. Written materials are available in English and Spanish; translation assistance in Arabic.	\$55,000
LEGAL AID SOCIETY OF SAN DIEGO, INC.	<i>Unlawful Detainer Assistance Program-South County Courthouse</i>	San Diego	Third Year	Focused on significantly monolingual communities, this fully-bilingual clinic will assist with UD actions, fee waivers, and service assistance for low-income plaintiffs and defendants, including those affected by the foreclosure crisis. All documents will be translated. Outreach to targeted communities is conducted.	\$65,000
LEGAL AID SOCIETY OF SAN MATEO COUNTY	<i>San Mateo County Landlord/Tenant Clinic</i>	San Mateo	Third Year	This project provides services in landlord/tenant matters. Self-represented litigants who visit the clinic are provided with pleadings, which can be filed with the court in the same building. Post-clinic telephone assistance is anticipated. All services are available in English and Spanish.	\$45,000

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LEGAL ASSISTANCE FOR SENIORS	<i>Partnership to Assist Guardianship Litigants</i>	Alameda	Third year	Low-income and indigent litigants are given help with the procedural requirements of guardianships. Assistance will be available to unrepresented parties of any age, and from any perspective, who need help with the guardianship process. Services will be provided by pro bono attorneys on a day-of-court basis and by LAS staff via workshops and referrals from the Clerk.	\$60,000
LEGAL SERVICES OF NORTHERN CALIFORNIA	<i>Consumer Advice Clinic</i>	Yolo	Second year	This clinic provides procedural assistance to litigants with consumer-related problems to prepare them to self-represent in court or resolve problems before trial, and to steer them toward long-term solutions. Specific areas of focus include disputed debts, credit agency errors, and identity theft.	\$50,000
LEGAL SERVICES OF NORTHERN CALIFORNIA	<i>Self-Help Legal Access Center</i>	Mendocino	Fifth 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, family law, debt collection, civil asset forfeiture.	\$50,000
LEGAL SERVICES OF NORTHERN CALIFORNIA	<i>Legal Information and Assistance Project</i>	Shasta, Lassen, Siskiyou, Trinity, Modoc	Eighth year	This project assists low-income self-represented civil law litigants in four remote counties. Services are provided 1:1 focusing on assisting consumers understand state and local civil law requirements and procedures on filing, responding to pleadings, meeting service and notice requirements, and filing and obtaining enforceable orders after hearing. Mediation clinic to assist litigants with parenting plans and expungement community education classes. Substantive areas include family law, restraining orders, small claims, civil answers, complaints, enforcements of judgments, guardianships, divorce; foreclosures and short sales.	\$25,000

LEGAL SERVICES OF NORTHERN CALIFORNIA	<i>Solano County Restraining Order Clinic (SCROC)</i>	Solano	Fifth Year	This project provides 1:1 assistance with forms completion to low-income pro per litigants seeking domestic violence or civil harassment restraining orders, and assistance with elder abuse and workplace violence. Additional assistance in paternity, dissolution, and separation filings.	\$45,000
LOS ANGELES CENTER FOR LAW AND JUSTICE	<i>Help with Orders Prepared for Enforcement</i>	Los Angeles	Second Year	LACLJ's staff attorney and Justice Corps volunteers will act as the court's scriveners to prepare enforceable Judgments and Orders After Hearings for SRLs who qualify for fee waivers. The project provides self-represented litigants with signed, enforceable copies of court orders issued in their family law cases. No contact is made with the litigants.	\$60,000
NEIGHBORHOOD LEGAL SERVICES OF LOS ANGELES COUNTY	<i>San Fernando Civil Harassment Project</i>	Los Angeles	New Proposal	<p>The San Fernando Self-Help Center's staff and volunteers help people navigate through the court system, from filling out the appropriate forms, to how and what to say before a judge. The Centers provide assistance with small claims, evictions, family law and other civil litigation. Internet access, computerized court forms and Alternative Dispute Resolution are also available. Through the Civil Harassment Project, NLS wishes to expand its services to civil harassment litigants, as well as expand the attorney staff available at the San Fernando SHLAC.</p> <p>This program will share its model for the civil harassment project, by leading planning for a statewide conference on civil harassment (including subsidies for participant travel), sharing HotDocs forms, and by providing technical assistance to self-help programs in civil harassment throughout the year. Additionally, the program will explore piloting the provision of remote services in civil harassment to self-represented litigants in partnership with a small or rural program to be determined.</p>	\$90,000

NEIGHBORHOOD LEGAL SERVICES OF LOS ANGELES COUNTY	<i>San Gabriel Valley Self-Help Legal Access Center</i>	Los Angeles	Third Year	This project, which operates out of the Pasadena Courthouse, is a successful partnership between the Court, 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.	\$90,000
PRO BONO PROJECT SILICON VALLEY	<i>Family Court Settlement Project</i>	Santa Clara	New Project	This project provides attorney assistance to help negotiate collaborative settlement services re Orders to Show Cause (OSCs) in custody or visitation matters. Volunteer or staff attorneys will attend self-represented Law and Motion calendar for court referrals to prepare stipulated orders if an agreement can be reached. One attorney will meet with each party to identify issues, then all will meet together to seek agreement on terms for an order.	\$57,000
PUBLIC COUNSEL	<i>Appellate Self-Help Clinic</i>	Los Angeles	Fifth Year	The clinic provides technical assistance, brief counsel and advice to <i>pro se</i> litigants. The Clinic also: (1) identifies litigants with civil appellate matters that may be appropriate for <i>pro bono</i> representation and makes referrals to the Appellate Courts Committee of the LA County Bar Association; (2) recruits and trains <i>pro bono</i> attorneys and law students to assist in reviewing and handling appeals; (3) disseminates self-help materials created by the Court and Public Counsel; and (4) coordinates with the Office of the Clerk on administrative issues relating to the handling of <i>pro se</i> litigants.	\$45,000
PUBLIC LAW CENTER	<i>Orange County Courthouse Guardianship Clinic</i>	Orange	Third 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 <i>pro bono</i> assistance with the legal process surrounding guardianship proceedings. PLC will develop guides to the individual steps involved in securing guardianships and will create corresponding educational presentations. It will translate the sample set of completed Judicial Council forms into Spanish and Vietnamese.	\$38,000

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PUBLIC SERVICE LAW CORPORATION OF RIVERSIDE COUNTY	<i>Inland Empire Expungement Project</i>	Riverside	New Project	The Project will cover criminal record expungement and/or reduction of past criminal convictions from felonies to misdemeanors. Services will be delivered to pro per litigants in the form of information packets and handouts and in a clinic document preparation setting where interns will prepare PC 1203.4 paperwork for the pro per litigant to file in court.	\$50,000
SAN DIEGO VOLUNTEER LAWYER PROGRAM	<i>North County Civil Harassment Restraining Order Clinic</i>	San Diego	Third Year	The Clinic provides advice and assistance for all stages of the civil harassment process from completing the petition to the hearing procedures. Assistance includes completion of all necessary documents, information and advice on consequences of the CHTRO, trial preparation and potential resources for legal advocacy or assistance at the hearings. Staff has Spanish language capacity. Legal services are delivered by volunteer attorneys and law students overseen by a staff attorney and a managing attorney to supervise to the legal work.	\$65,000
SAN FRANCISCO BAR VOLUNTEER LEGAL SERVICES	<i>Family Law Assisted Self-Help Project</i>	San Francisco	New Project (returning in new form after six year hiatus)	This clinic provides information and assistance on family law issues (dissolution, separations, annulments, paternity, custody, visitation, support). Service delivery has changed from brief service clinics to three more substantive modes - mediation between self-represented litigants (SRLs) to assist in resolution of custody and support issues, in-depth assessment, and more detailed assistance for those with particularly complex matters.	\$50,000
SENIOR CITIZENS' LEGAL SERVICES	<i>Conservatorship & Elder Abuse Project (CEAP)</i>	Santa Cruz	Fourth Year	This project provides legal assistance, education and referral services to litigants seeking conservatorships and elder abuse restraining orders. Staff will also assist litigants to complete required probate and local forms for conservatorships and guardianships, including renewals of LPS conservatorships being transferred from Public Guardian to close relatives.	\$54,000

ATTACHMENT B

THE WATSONVILLE LAW CENTER	<i>Language Access Project</i>	Santa Cruz	Third year	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. The bilingual paralegals assist community members to obtain legal information and fill out court forms and pleadings, addressing language, cultural and literacy needs. Areas of focus include family, restraining orders, name changes, guardianship, conservatorship, landlord/tenant, small claims.	\$80,000
TOTAL					\$2,000,000



THE STATE BAR OF CALIFORNIA

LEGAL SERVICES TRUST FUND PROGRAM

180 HOWARD STREET, SAN FRANCISCO, CALIFORNIA 94105-1617

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

TO: Executive Directors

FROM: Lorna Choy, Senior Grants Administrator
Legal Services Trust Fund Program

DATE: August 16, 2010

SUBJECT: **REQUEST FOR PROPOSAL:**
2011 EQUAL ACCESS FUND PARTNERSHIP GRANTS

We are pleased to issue this Request for Proposal (RFP) for the twelfth grant period of Partnership Grants (calendar year 2011). This RFP is for both current recipients of Partnership Grants applying for refunding and new applicants.

Submit an original and five copies (**6 total**) of the proposal to:

Lorna Choy, Senior Grants Administrator
Legal Services Trust Fund Program
The State Bar of California
180 Howard Street
San Francisco, CA 94105-1639

Hard copies must be received by the Trust Fund Program no later than Friday, September 17, 2010. Additionally, please e-mail your proposal to trustfundprogram@calbar.ca.gov.

The RFP package includes **three** sections:

- Background Information, Process and Criteria (pages 1-3).
- Instructions (pages 4-13).
- Forms (following page 13).

You will find the electronic version of this package at www.calbar.ca.gov/ioltaapplicationmaterials. If you have questions, contact this office by e-mail at trustfundprogram@calbar.ca.gov, or call a Grants Administrator:

Lorna Choy	(415) 538-2535
Daniel Passamaneck	(415) 538-2403
Denise Teraoka	(415) 538-2545

You may also contact Bonnie Hough at the Administrative Office of the Courts at (415) 865-7668 or bonnie.hough@jud.ca.gov.

**THE LEGAL SERVICES TRUST FUND PROGRAM
EQUAL ACCESS FUND - PARTNERSHIP GRANTS**

REQUEST FOR PROPOSAL for 2011 GRANTS

For All Applicants

BACKGROUND INFORMATION, PROCESS AND CRITERIA

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BACKGROUND INFORMATION

The State Budget Act allocates funds to the Equal Access Fund “to improve equal access and the fair administration of justice.” The Fund is given to the Judicial Council to be distributed through the State Bar’s Legal Services Trust Fund Program. A total of \$2,000,000 is tentatively available this year for Partnership Grants to legal services programs “for joint projects of courts and legal services programs to make legal assistance available to pro per litigants.” *This amount will be finalized after the California State Budget has been adopted and the Judicial Council takes action regarding the Equal Access Fund appropriation.*

The administration of Partnership Grants funds is different from other Trust Fund Program grants. This is a competitive grant process. The Trust Fund Commission and Judicial Council have complete discretion and flexibility to distribute the funds in the way they deem most appropriate. Once grant decisions have been made and approved by the Judicial Council, they will be final. There is no appeals process.

TIMING AND GRANT PERIOD

Partnership Grant proposals must be received in the Trust Fund Office by **Friday, September 17, 2010**. We expect the selection process to be concluded in December. Grants will be awarded for a one-year period commencing January 1, 2011.

GRANT SIZE

Historically, grants have been awarded in the range of \$30,000 to \$80,000. Because we are in the extraordinary position of having additional funds to distribute due to a one-time infusion of undistributed filing fee revenue, we may consider applications for larger sums this year. The Commission will notify each successful applicant of a final grant

amount and will request revisions to the proposed budget if the requested amount varies from the final grant award.

SEED MONEY/FUTURE FUNDING

These grants are intended to be “seed money” to help support projects that must eventually be funded from general operating or other sources of revenue. Applicants **must** describe plans for obtaining future funding from other sources for these projects. A project that has received funding for five years will not be considered for renewal except under extraordinary circumstances.

ELIGIBILITY REQUIREMENTS FOR PARTNERSHIP GRANTS

To be eligible to receive a Partnership Grant, there are four basic requirements:

- 1. Qualified Legal Services Projects.** Applicants must be current recipients of Legal Services Trust Fund Program grants.
- 2. Joint Court/Legal Services Program Projects.** Proposals must be for joint projects of courts and legal services programs, preferably at or near the courthouse.
- 3. Indigent.** Recipients of services funded by the grant must be indigent, as defined under Business and Professions Code §6213(d).
- 4. Self-Represented Civil Litigants in State Court.** Use of these funds is restricted to providing assistance to litigants who are pursuing matters in state court without the assistance of counsel. Funds cannot be used to make court appearances on behalf of users of the self-help project.

SELECTION CRITERIA FOR PARTNERSHIP GRANTS

The Commission will consider the extent to which project planners have thoroughly addressed all the issues identified in this RFP, and will select a range of high-caliber projects around the state that serve different client constituencies with a variety of legal problems.

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

- 1. Impact of Services.** The Commission will consider the extent to which the project will address the needs of the targeted population resulting in meaningful and timely outcomes.

2. **Collaboration with Cooperating Court.** This must be a joint project with the court. The Commission will consider the extent to which the applicant and cooperating court plan to collaborate regarding access for self-represented litigants.
3. **Integration with Court-Based Services.** The Commission will consider the extent to which the applicant's services or planned services are integrated with other court-based services, including the Family Law Facilitator, self-help centers and other offices of the cooperating court.
4. **Court's Impartiality.** The Commission will evaluate all proposals to determine their ability to protect the court's independence and impartiality. If the project intends to serve only one side of a matter/case (e.g., only tenants, or only petitioners), the applicant must demonstrate that it has sufficiently explored all the implications of this decision with the court, and identified alternate legal resources that can provide equivalent levels of assistance to the opposing parties.
5. **Conflict of Interest.** If a project establishes an attorney-client relationship with the litigants, the Commission will evaluate the availability of meaningful referrals for individuals who are not eligible to use the services because they present a conflict of interest for the project.
6. **Information and Referrals.** The Commission will consider the method(s) by which the project will provide information and referrals to litigants who are not eligible to use the services for any reason.
7. **Additional Support.** In anticipation of the eventual reduction or elimination of a Partnership Grant, the Commission will consider the applicant's diligence in pursuing other support for the continuation of the project. It will take into account your efforts to pursue other sources of funding and support, as well as funds or support actually contributed, such as commitments of the program's general operating revenue, recruitment of pro bono volunteers and in-kind support.
8. **Evaluation.** All applicants must incorporate evaluation into their Partnership proposal (refer to No. 11 of the Instructions). Applicants seeking refunding will be assessed on their utilization of evaluation results.

EQUAL ACCESS FUND - PARTNERSHIP GRANTS

2011 REQUEST FOR PROPOSAL

FOR ALL APPLICANTS

INSTRUCTIONS

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Proposals will consist of the following components:

- A. Two-page Project Abstract (using attached form)
- B. Ten-page Project Narrative (using attached form)
- C. Assurances for Partnership Grants (using attached form)
- D. Project Budget (using attached form)
- E. Budget Narrative (using attached form)
- F. Indication of Support from Cooperating Court

Submit an **original and five copies (6 total)** of the proposal. Mail or deliver proposals to:

**Lorna Choy, Senior Grants Administrator
Legal Services Trust Fund Program
The State Bar of California
180 Howard Street
San Francisco, CA 94105-1639**

Proposals must be received in the Trust Fund Office by **Friday, September 17, 2010**. Also e-mail your entire proposal to **trustfundprogram@calbar.ca.gov**.

FORM A. PROJECT ABSTRACT

Use the two-page form to provide general project information and to indicate the amount requested. The summary description, standing alone, must accurately and thoroughly summarize the proposed project.

FORM B. PROJECT NARRATIVE

The Project Narrative must be in the following format, using the numbers and titles set forth below. Each question must be answered in the narrative. The proposal must be self-contained. Do not refer the reader to any prior applications, proposals or other documents.

The Project Narrative can be up to ten pages in length, single-spaced, in lettering no smaller than 12 points. Pages must be numbered. The 10-page limit does not include the project abstract, project budget, budget narrative, assurances, letter of support from the court, or the memorandum of understanding.

Applicants for refunding: Identify and explain any changes to your project since it became operational, with particular attention to differences in current-year operations from those stated in your previously-approved proposal. Describe any further changes you intend to make as the result of your experience and/or evaluation outcomes.

1. Program's Qualifications

Provide an overview of your program's qualifications, highlighting experience providing assistance to self-represented litigants and the expertise of staff members who are responsible for the project.

2. Needs Assessment

Describe the methods used to select the subject matter to be addressed and services to be offered by the project, including a clear rationale for the decision. Describe the demographics of the client community and the geographic area served by the project. Explain why the target population is in particular need of services on an ongoing basis. Include information about the lack or limitation of other legal resources and any other special factors.

3. Goals and Objectives

Describe the project's goals and objectives and, if you are applying for refunding, whether they have changed over the life of the project or are expected to change for the upcoming funding cycle. Include quantitative goals and estimates of the actual number of litigants to be served. Highlight the outcomes to be achieved for users of the project. Discuss the involvement of the court and other collaborative partners in setting and achieving the goals and objectives.

4. Types of Services and Resources Available

Describe the subject areas to be covered and types of services to be offered. Describe the specific kinds of legal problems you expect to address and how services will be delivered to pro per litigants. Applicants for refunding must describe all changes envisioned for the proposed continuation of the project and the reasons for any such changes.

Identify or list resources available to pro per litigants, including written materials, audio-visual resources and/or computer stations. Identify any new resources to be developed. Who will be responsible for preparing those materials or other

resources? Will resources be available in multiple languages? How will you publicize the availability of existing or new resources?

5. Litigant Eligibility and Subject Matter Screening

Describe how you will verify income eligibility for each litigant. Also describe the methods you will use to screen for subject matter eligibility.

6. Conflicts/Serving Both Sides/Attorney-Client Relationship

- a. If the project expects to establish an attorney-client relationship with any litigant, describe how you will check for conflicts. Will you have online access to the program's database, or will some other method be used to check for conflicts? Describe any conflicts panel you have established or plan to establish, and the protocols to be used for making referrals.
- b. If the project intends to serve only one party or side of a matter, explain why the project will limit its services in this way. The applicant **must** demonstrate that it has explored with the court all of the implications of this decision to serve one side, and has addressed any risk of an appearance of impropriety on the court's part. Your letter of support from the presiding judge must clearly indicate that the court understands the implications and agrees with the program's decision to serve one side.

Describe all steps taken to ensure that the interests of the opposing party(ies) have been considered. List all persons and/or offices with whom you have communicated that provide services in the courthouse, or in the relevant area(s) of law (e.g., public defender's office, association of landlords' attorneys, etc.).

- c. If the project does not expect to establish attorney-client relationships, describe the methods that will be used to make litigants aware of any limitations on the scope of services to be provided. How will you ensure that customers understand an attorney-client relationship will not be established?

7. Referral Protocols

Describe referral information that is being or will be provided to ineligible litigants.

- a. How will you make *meaningful referrals* in situations where the project will serve only one side, or where a conflict arises? (A "meaningful referral" is one that directs the recipient of the referral to a source of information or advice that will actually assist the recipient.)

- 1) Describe the commitments made by the entities to which litigants will be referred. What arrangements have been made to expedite the referral process and to guarantee effective referrals?
 - 2) Describe the procedures and protocols used to ensure referred pro per litigants are being assisted in a *meaningful* manner by said entities.
 - 3) Describe how you will otherwise address the needs of unrepresented litigants. For example, will general information in the form of fact sheets, videos or other materials be available to those who are referred elsewhere?
- b. For litigants who are ineligible for services due to income, subject matter or residency, what arrangements will be made to provide them referrals or otherwise address their needs? Will general information in the form of fact sheets, videos or other materials be available to these individuals?

8. Staffing, Training and Supervision

Identify the staffing for the project. If you expect to use volunteers, indicate the number of volunteers involved and describe the work that volunteers will undertake. How will staff and volunteers be trained? Who will be responsible for supervision? If the supervisor will not be on-site, describe the steps taken to ensure adequate supervision.

9. Technology and Equipment

Identify the equipment that is or will be available for use by staff and volunteers of the project, including telephones, copiers, and computers. Explain how that equipment is or will be incorporated into the project's operations. If the equipment is or will be shared with other agencies, describe the ways that usage is or will be coordinated. Also identify any equipment that you will make available directly to users of the project. What database systems and web-based legal resources will you utilize?

10. Site and Accessibility

Provide information about the location or planned location for the project, including its accessibility. How will you address language barriers and ensure that the services provided are culturally competent? For courthouse-based projects, describe the signage that has been or will be posted in the courthouse. If the project is not located at the courthouse, explain how you will help ensure that litigants follow up with the assistance received and otherwise overcome the distance barrier.

11. Evaluation

Annual submission of evaluation reports is a condition of funding. All grant recipients will be required to submit an Evaluation Plan in March, 2011 and a Final Evaluation Report after the close of the grant year. In addition, projects receiving Partnership Grant funding for the first time must submit an Interim Status Report in July, 2011.

The Evaluation Plan and Interim Status Report provide grantees with information needed to assess project performance compared to stated goals, and to design and implement changes as appropriate. Both the discussion of methodology and the dissemination of findings are important for the effective and efficient use of Equal Access Fund money.

At the close of the grant year, all grantees will be required to provide data on the services provided and to assess the quality and effectiveness of the project as a whole. The project must also provide a report of funding and expenditures. Grantees are asked to assess the quality and effectiveness of their services using a combination of evaluation methodologies that may include focus groups, customer surveys, interviews with court personnel, file review and courtroom observations. Materials providing guidance in undertaking such assessments are posted at the California Legal Advocates web site. (Go to CALegalAdvocates.org, select the "Legal Services Trust Fund Evaluation Toolkit" link in the left-hand column, then click the "Evaluation Toolkit" link.)

12. Timetable

For new projects, describe the proposed timetable for implementation of the project in 2011, including plans for each quarter of the grant year. For ongoing projects, describe the continuing work plan for 2011.

13. Project Continuity

Applicants **must** describe plans for obtaining other sources of funding for their projects. Include fundraising efforts, commitments of future funding, in-kind contributions, etc. Applicants should have plans to obtain other funding for 50% to 100% of their project's costs after three years of Partnership Grant funding, and to operate independently from the Partnership Grants Program after no more than five years.

For projects that have been funded for three years or more, explain the need for continued Partnership Grant funding. Indicate how much of the program's own general operating revenues have been committed to the project. Indicate all funding sources that you approached, the amounts requested and the amounts actually raised for 2010 operations. Specifically identify any funds that have

been obtained by leveraging your Partnership Grant. If other funding or support was not obtained, explain the reasons why you were not able to garner this support.

Ordinarily, the Commission will not provide Partnership Grant funding for the same project for more than five years. However, recognizing that programs continue to face difficult challenges related to fundraising, and particularly those operating in rural locations, the Commission may consider an application for funding beyond the fifth year. Any applicant seeking funding beyond the fifth year must describe extraordinary circumstances that justify a departure from the Commission's general policy. You must clearly demonstrate exceptional and unusual circumstances. Please contact Trust Fund staff for further information before preparing such a proposal.

14. Collaborative Partners

Provide information about others who will collaborate on the project, as well as all in-kind support for the project. Include information about current and planned collaboration with other local legal services programs, the Family Law Facilitator, Family Law Information Center, other self-help projects in the court and community, the Clerk of the Court, and other offices of the cooperating court. Describe the substance and effectiveness of any existing collaboration and any modifications that are envisioned. Explain steps that are being taken to help litigants avoid confusion about the different services available, and to minimize duplication of effort. If a subgrant of any Partnership Grant funds is envisioned, provide details for that arrangement, including plans for oversight and evaluation of the services provided by the subgrantee.

15. Collaborative Planning with the Court

Provide information about the court that has jointly agreed to sponsor this project, including the history of collaboration between the court and the applicant. Describe the general areas of responsibility that the court has agreed to assume, and those that will remain the responsibility of the applicant.

Existing projects should attach a copy of their current agreements with the court and identify any areas that will be the subject of revisions. Applicants must specifically address the following issues with the court:

- a. Assurance of the Court's Impartiality and Independence** – If the project proposes to provide services for only one party or side of a matter, the court must indicate its agreement and understanding of the implications of this decision in its letter of support. Describe the discussions that have occurred to arrive at that decision and provide specific details regarding the court's understanding.

- b. Ongoing Coordination** – You must arrange for ongoing meetings with court personnel, no less often than quarterly, to discuss collaboration issues as they arise. You should develop formal agendas for these meetings. Services must be coordinated with all self-help providers in the participating court system, including the Family Law Facilitator and the Family Law Information Center, whether or not they provide assistance to the same litigants the project serves.
- c. Clear Distinction Between Parts of Delivery System** – You must identify existing services that the court makes available for self-represented litigants, and clarify how services provided through the Partnership Grant project are different. How will users of the services distinguish between the court's neutral role and your Partnership Grant project?
- d. Services Provided, Information and Referrals** – You must articulate a clear agreement about the types of legal issues covered by this project, resources available, and level of service provided to consumers, as well as clear protocols regarding information and referrals available for persons ineligible for services.
- e. Logistics** – There must be plans for:
- **Security** – providing adequate security for staff, volunteers, and users of the project. Who will provide that security?
 - **Location/Hours** – ensuring the project's location and hours of operation for the provision of services are clearly specified.
 - **Equipment/Supplies** – providing equipment and supplies. If equipment is to be shared with other offices, describe the limitations to be placed on their use and what, if any, reimbursement will be required.
 - **Shared Space** – addressing all issues that may arise if more than one project is sharing space at the court.
- f. Project Continuity** – There must be plans for discussion between the legal services program and the court regarding the ongoing nature of the proposed project, including whether and how the project can be continued following this grant year.
- g. Evaluation** – There must be plans for ongoing integral evaluation that gathers, organizes and incorporates input from both the legal services program and the court during and after the grant year to ascertain ways to improve the services.

FORM C. ASSURANCES FOR PARTNERSHIP GRANTS

Provide appropriate signatures for the Assurances.

FORM D. PROJECT BUDGET

Use the attached Project Budget form to provide an estimated project budget, including the amount requested for the upcoming funding cycle of Partnership Grants (Column 1), Other Trust Fund monies that the program will commit to the project (Column 2), and Non-Trust Fund monies (Column 3). Identify the value of any in-kind contributions in Column 5. Carry-over Partnership Grant funds, if any, should be included at line 25.

FORM E. BUDGET NARRATIVE

Complete the attached Project Budget Narrative form to provide an explanation for each line item in the project budget. Identify the costs to be covered by a Partnership Grant, by other Trust Fund monies, and any expenses to be covered by cash or in-kind contributions by any organization, including the applicant, the cooperating court, or any third party partner. Also identify the nature and source of all cash or in-kind resources to be utilized by the project, the estimated value of such in-kind contributions and the basis for the estimated value.

Expense Categories. Descriptions of expenses to be included in the Project Budget (Form D) and Budget Narrative (Form E) are as follows:

Lawyers. Salaries and wages paid to staff attorney(s), whether full-time, part-time or temporary.

Paralegals. Salaries and wages paid to staff paralegal(s) (including law graduates, legal assistants and law students), whether full-time, part-time or temporary. Paralegals are persons working under the supervision and control of an attorney, whose duties consist primarily of such activities as intake interviewing, case investigations, checking court records, legal research, client representation at administrative hearings and outreach and community work.

Other Staff. Salaries and wages paid to all other staff, including administrative and support staff, whether full-time, part-time or temporary.

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

Space. A share of space costs commensurate with the actual costs of housing staff and services funded by this proposed grant. This may include rent, utility payments, maintenance/janitorial expenses.

Equipment Rental and Maintenance. Lease or rental expenses for office furniture, fixtures and equipment (except telephone) acquired for use by the proposed project; a commensurate share of anticipated maintenance costs for that equipment.

Supplies, Printing and Postage. Basic office supplies, including materials used in copiers. Equipment purchases under \$1,000 may be included here. Printing and postage should also be included in this category.

Telecommunications. Local, long distance, or cellular telephone service expenses incurred directly by the proposed project. Similar and related expenses for voice mail, conference calls, videoconferencing, or other telecommunications services should be included as well. Telecommunications equipment purchases that will not be depreciated may also be included here.

Travel. Travel expenses incurred by staff or volunteers to provide services through, or to administer, the proposed project.

Training. Non-personnel costs associated with training or continuing education for **staff members or volunteers** who provide services through the proposed project. You may include the cost of travel to and from training events, per diem, conference registration fees or tuition, purchase or production of training materials, etc. Do not include expenses associated with training that you provide to the public or to other organizations.

Library. Expenses for the maintenance and expansion of office libraries required by the proposed project, including subscriptions to periodicals, books and update services or electronic research services. Individual purchases exceeding \$1,000 should be included under "Capital Additions."

Insurance. A share of professional liability insurance and bonding costs proportionate to staff who are funded by the proposed grant. A share of property insurance (fire and theft) and liability insurance for property and automobiles commensurate with their use by the proposed project.

Audit. Costs related to auditing the Partnership Grant. Do not include costs for bookkeeping or ongoing accounting services here.

Evaluation. Expenses for gathering and analyzing information and data, and reporting on the effectiveness of services provided.

Capital Additions. Equipment and library purchases over \$1,000 per item. Provide a separate description for each such proposed purchase. Purchases of tangible personal property with Trust Fund monies are governed by the "Guidelines for Acquisition of Tangible Personal Property."

Contract Service to Clients. Payments to private attorneys, consultants or organizations to provide professional services to litigants through the proposed project. **Itemize** individual contracts, specifying contractors, the general nature of duties to be performed, the rate of compensation and the contract amount.

Contract Service to Organization. Payments for all other services to the organization specifically with regard to the proposed project, such as bookkeeping or other accounting services, technology and development consultant fees, etc. **Itemize** individual contracts, specifying contractors, the general nature of duties to be performed, the rate of compensation and the contract amount.

Other. Expenses not included above. **Itemize** individual “Other” expenses.

FORM F. INDICATION OF SUPPORT FROM COOPERATING COURT

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

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. Grant funds will not be disbursed without receipt of a fully-executed agreement.

- ❖ Programs with existing projects must include a copy of their currently-effective Memorandum of Understanding, together with a description of any changes that are proposed for the coming grant year and the reasons for such changes. Revised MOU’s may be submitted subsequent to the Commission’s approval of a Partnership Grant, but should be submitted **no later than January 31, 2011.**
- ❖ For programs applying for new project funding, the Memorandum of Understanding may be submitted subsequent to the Commission’s approval of a Partnership Grant, but should be submitted **no later than January 31, 2011.**

**THE LEGAL SERVICES TRUST FUND PROGRAM
EQUAL ACCESS FUND – PARTNERSHIP GRANTS
2011 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): 2005: _____

2006: _____

2007: _____

2008: _____

2009: _____

2010: _____

Partnership Grant funds remaining as of August 31, 2010: _____

(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
2011 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
2011 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 2010, 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 project.

Signed:

Executive Director
Applicant Program

Chair, Board of Directors
Applicant Program

Date

Date

**THE LEGAL SERVICES TRUST FUND PROGRAM
EQUAL ACCESS FUND - PARTNERSHIP GRANTS
2011 REQUEST FOR PROPOSAL**

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 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
2011 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
2011 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: 2010-2011
MEMBERS OF THE PARTNERSHIP GRANTS COMMITTEE**

<p>David Lash, Trust Fund Commission Co-Chair 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 Attorney Member: 2007-2013 Judicial Council</p>	<p>Ellen Pirie, Trust Fund Commission Vice Chair County of Santa Cruz 701 Ocean Street, Room 500 Santa Cruz, CA 95060 ph: (831) 454-2200 fx: (831) 454-3262 e-mail: ellen.pirie@co.santa-cruz.ca.us Attorney: 2002-2007, 2007-2010, 2011 Board of Governors</p>
<p>Mollie Gomez 2101 N. Tustin Avenue Santa Ana, CA 92705 ph: (562) 868-2422 fx: (714) 571-5270 e-mail: molecue8@aol.com Public Member Client: 2010-2013 Board of Governors</p>	<p>Donna Hershkowitz Assistant Director, Office of Governmental Affairs Judicial Council–Administrative Office of the Courts 770 L Street, Suite 700 Sacramento, CA 95814 ph: (916) 323-3121 fx: (916) 323-4347 e-mail: donna.hershkowitz@jud.ca.gov Attorney Member: 2005-2011 Judicial Council</p>
<p>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 Attorney Member: 2008-2011 Board of Governors</p>	<p>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 Attorney Member: 2010-2011 Judicial Council</p>
<p><u>Hon. Maria P. Rivera</u> Justice, First District Court of Appeal 350 McAllister Street San Francisco, CA 94102-4712 ph: (415) 865-7240 fx: (415) 865-7309 e-mail: maria.rivera@jud.ca.gov Judge: 1999-2001 Justice: 2002-2013 Judicial Council</p>	<p>Barry J. Tucker 12676 Rue Parc San Diego, CA 92131 ph: (619) 742-5062 e-mail: barrytucker@san.rr.com Attorney Member: 2009-2012 Board of Governors</p>

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: