



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 13, 2013

|   |  |
|---|--|
| Title   | Agenda Item Type   |
| Equal Access Fund: Distribution of Funds for Partnership Grants | Action Required  |
| Rules, Forms, Standards, or Statutes Affected                   | Effective Date   |
| None  | December 13, 2013  |
| Recommended by  | Date of Report   |
| State Bar Legal Services Trust Fund Commission                  | November 24, 2013  |
| Adrian Dollard, Cochair   | Contact  |
| Donna Hershkowitz, Cochair                                      | Bonnie Rose Hough, 415-865-7668<br>bonnie.hough@jud.ca.gov |

**Executive Summary**

As stated in its report on the *Equal Access Fund: Distribution of Fourteenth Year Equal Access Fund Partnership Grants*, the State Bar Legal Services Trust Fund Commission requests that the Judicial Council approve the distribution of \$1,518,000 in partnership grants for 2014, according to the statutory formula in the state Budget Act, and approve the commission’s findings that the proposed budget for each individual grant complies with statutory and other guidelines.

**Recommendation**

The Legal Services Trust Fund Commission recommends that the Judicial Council approve the distribution of \$1,518,000 in Equal Access Fund Partnership Grants for distribution to the following legal services agencies for programs conducted jointly with courts to provide legal assistance to self-represented litigants:

1. **Asian Pacific Islander Legal Outreach:**  
Northern San Mateo County Restraining Order Clinic ..... \$50,000

2. **Bay Area Legal Aid:**  
Housing Law Clinic (Contra Costa) ..... \$60,000
  
3. **Bet Tzedek Legal Services:**  
Building Community & Expanding Access to Legal Services in  
Los Angeles County ..... \$100,000
  
4. **Central California Legal Services, Inc.:**  
Elder Abuse Access to Justice Partnership—Fresno and Tulare Counties ..... \$75,000
  
5. **Community Legal Services in East Palo Alto:**  
San Mateo County Unlawful Detainer Mandatory Settlement Conference ..... \$50,000
  
6. **East Bay Community Law Center:**  
Civil Justice Self Help Project (Alameda) ..... \$65,000
  
7. **Elder Law and Advocacy:**  
Imperial County Bilingual Conservatorship/Guardianship Clinic ..... \$45,000
  
8. **Family Violence Law Center:**  
Alameda County Domestic Violence Self-Representation Assistance ..... \$23,000
  
9. **Greater Bakersfield Legal Assistance, Inc.:**  
Kern County Orders Project ..... \$50,000
  
10. **Inland Empire Latino Lawyers Association:**  
Small Claims Advocacy & Awareness Project (Riverside/San Bernardino) ..... \$25,000
  
11. **Justice and Diversity Center:**  
Family Law Assisted Self-Help (FLASH) Project (San Francisco) ..... \$50,000
  
12. **Legal Aid Foundation of Los Angeles:**  
Long Beach Self-Help Legal Access Center ..... \$80,000
  
13. **Legal Aid of Marin:**  
Unlawful Detainer/MSJ Calendar Assistance ..... \$45,000
  
14. **Legal Aid Society of Napa Valley:**  
Small Claims Assistance Project ..... \$25,000
  
15. **Legal Aid Society of Orange County:**  
Limited Conservatorship Clinic ..... \$25,000  
Unlawful Detainer Clinic.....\$50,000

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|---|--------------------|
| <b>16. Legal Aid Society of San Diego, Inc.:</b>                          |                    |
| Civil Harassment & Elder Abuse Restraining Order Program at the HOJ ..... | \$60,000           |
| San Diego County Conservatorship Assistance Project .....                 | \$55,000           |
| <b>17. Legal Assistance for Seniors:</b>                                  |                    |
| Partnership to Assist Guardianship Litigants (Alameda) .....              | \$30,000           |
| <b>18. Legal Services of Northern California:</b>                         |                    |
| Civil Harassment and Small Claims Mediation Project (Butte) .....         | \$30,000           |
| Mother Lode Pro Per Project (Amador, Calaveras, El Dorado, Placer) .....  | \$58,000           |
| Consumer Assistance Clinic (Yolo) .....                                   | \$57,000           |
| <b>19. Neighborhood Legal Services of Los Angeles County:</b>             |                    |
| Chatsworth Consumer Debt Relief .....                                     | \$40,000           |
| Pasadena Unlawful Detainer Assistance Project .....                       | \$60,000           |
| <b>20. Pro Bono Project Silicon Valley:</b>                               |                    |
| Family Court Settlement Project (Santa Clara) .....                       | \$40,000           |
| <b>21. Public Counsel:</b>  |                    |
| Pro Per Guardianship Clinic (Los Angeles) .....                           | \$60,000           |
| <b>22. Public Law Center:</b>   |                    |
| Orange County Expanded Domestic Violence Assistance Project .....         | \$50,000           |
| Orange County Spanish Language Self-Help Dissolution Workshops .....      | \$60,000           |
| <b>23. San Diego Volunteer Lawyer Project:</b>                            |                    |
| North County Civil Harassment/Unlawful Detainer Self-Help Clinic .....    | \$50,000           |
| <b>24. Watsonville Law Center:</b>  |                    |
| Language Access to Court Project (Santa Cruz) .....                       | \$50,000           |
| <b>Total</b> .....  | <b>\$1,518,000</b> |

The text of the commission’s report and its attachments are found at pages 7–54.

## **Previous Council Action**

The Judicial Council has approved the proposed distribution for each of the past 14 years based on the recommendations of the Legal Services Trust Fund Commission.

## **Rationale for Recommendation**

For the last 14 years, the state Budget Act has contained a provision for the allotment of \$10 million to an Equal Access Fund “to improve equal access and the fair administration of justice.” (Assem. Bill 110, Stats. 2013, ch. 20, pp.11–15; Stats. 2012, ch. 21, pp. 14–18; Stats. 2011, ch. 33, pp. 17–21; Stats. 2010, ch. 712, pp. 21–25; Stats. 2009, ch. 1, pp. 18–22; Stats. 2008, ch. 268, pp. 32–36; Stats. 2007, ch.171, pp. 40–42; Stats. 2006, ch. 47, pp. 26–30; Stats. 2005, ch. 38, pp. 9–11; Stats. 2004, ch. 208, pp.16–17; Stats. 2003, ch. 157, pp. 11–12; Stats. 2002, ch. 379, pp. 30–31; Stats. 2001, ch. 106, pp. 73–74; Stats. 2000, ch. 52, pp. 78–79; Stats. 1999, ch. 50, pp. 55–56.)

In 2005, the Uniform Civil Fees and Standard Fee Schedule Act was approved by the Legislature and the Governor. That act established a new distribution of \$4.80 per filing fee to the Equal Access Fund. The estimated revenue from filing fees for the fund is \$5.7 million per year. Those revenues have been collected by the trial courts since January 2007.

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

The Budget Act states that “[t]he Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. . . . The Judicial Council may establish additional reporting or quality control requirements. . . .”<sup>1</sup> All recipients of partnership grants conduct an annual evaluation of the effectiveness of the programs, and are required to submit their evaluation results to the commission by March 1, 2015.

Under the Budget Act, the Chief Justice, as Chair of the Judicial Council, appoints one-third of the voting members to the commission—five attorney members and two public members, one of whom is a court administrator. The Chief Justice also appoints three nonvoting judges to the commission—two trial court judges and one appellate justice. (The membership roster is attached in the commission’s report at pages 47–48.)

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<sup>1</sup> The Budget Act language is attached in the commission’s report, at pages 15–18.

There are two grant programs, IOLTA-formula grants and partnership grants. The Budget Act provides that 90 percent of the funds be distributed to legal services agencies according to a statutory formula (the IOLTA-formula grants). The remaining 10 percent of the funds are to be distributed as partnership grants to legal services programs for projects conducted jointly with the courts to provide legal assistance to self-represented litigants. The process for choosing the legal services programs to receive these partnership grants is stated in the commission's report at pages 9–12.

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, 2014.

The commission's report on the allocation of the Equal Access Fund shows that the commission has followed the statutory requirements and the additional criteria proposed in a report to the Judicial Council at its August 1999 meeting.

### **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.

Administrative Office of the Courts (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 I 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

180 HOWARD STREET, SAN FRANCISCO, CALIFORNIA 94105-1617

TELEPHONE: 415-538-2252; FAX: 415-538-2389

### LEGAL SERVICES TRUST FUND COMMISSION – 2013-2014

*Adrian Dollard, Esquire*  
Co-Chair  
Qatalyst Partners

*Donna Hershkowitz, Esquire*  
Co-Chair  
Office of Governmental Affairs  
Judicial Council

*Christina S. Stokholm, Esquire*  
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Law Offices of Mark Pachowicz

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*Banafsheh Akhlaghi, Esquire*  
Pars Equality Center

*Tamara Lynn Beard*  
Superior Court of California  
County of Fresno

*Deborah F. Ching*  
Nonprofit Consulting Group

*Mark R. Conrad, Esquire*  
Office of the US Attorney

*Corey N. Friedman, Esquire*  
California Department of Industrial  
Relations

*Mollie Gomez*  
Public Member

*Emily Harpster*  
United Way of the Bay Area

*Parish Knox, Esquire*  
Best Best & Krieger, LLP

*Richard G. Reinis, Esquire*  
Step toe & Johnson LLP

*LaQuita Robbins*  
Public Member

*Susan D. Ryan, Esquire*  
Superior Court of California  
County of Riverside

*Kim Savage, Esquire*  
Law Office of Kim Savage

*Christian Schrieber, Esquire*  
Chavez & Gertler, LLP

*Melanie Snider*  
Family Law Facilitator, Superior  
Court, County of Butte

*Chen Song*  
Nathan Associates, Inc.

*Melissa L. White, Esquire*  
Landau & White Law Offices, LLP

### JUDICIAL ADVISORS

*Hon. Michael J. Convey*  
Superior Court of California  
County of Los Angeles

*Hon. Faye D'Opal*  
Judge of the Superior Court  
County of Marin

*Hon. William J. Murray, Jr.*  
Associate Justice of the Third  
Appellate District

DATE: November 22, 2013

TO: The Judicial Council of California

FROM: Adrian Dollard, Co-Chair  
Donna Hershkowitz, Co-Chair  
Legal Services Trust Fund Commission

Stephanie Choy, Managing Director  
Legal Services Trust Fund Program

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

### EXECUTIVE SUMMARY

Since 1999, the Judicial Council (the "Council") budget has included the Equal Access Fund, for grants to provide free legal assistance to indigent Californians. These grants are made through the Legal Services Trust Fund Commission of the State Bar of California (the "Commission").

Each year the Equal Access Fund is authorized by the State Budget Act. The Budget Act of 2013 includes a basic budgetary allocation from the General Fund of \$10,392,000 and additional funding from the Trial Court Trust Fund in the amount of \$5,482,000. The Budget Act also provides for funds for the cost of administration. Funds remaining, less administrative costs, are to be distributed in two parts: 90% of the funds are allocated according to the statutory Interest on Lawyers' Trust Accounts ("IOLTA") formula; 10% of the funds are set aside for discretionary Partnership Grants to legal services programs.

You first took action to implement this Fund in 1999, adopting procedures for the Chief Justice to appoint a third of the members of the Commission and approving protocols and policies established by the Commission. Each year since 1999, you have approved the award of grants.

At your August 2013 meeting, you approved distribution of the 90% of funds allocated to IOLTA-Formula grants in the total amount of \$14,462,250. These funds were allocated according to a formula set forth in the IOLTA statute (Business and Professions Code sections 6210 et seq.) and pursuant to procedures already in place for determining eligibility and administering grants.

Since that time, it has been determined that filing fee revenue over a two-year period may fall as much as \$890,000 below projected levels. For that reason, prudence dictates that the amount to be distributed in Partnership Grants should be

limited to \$1,518,000, representing approximately \$89,000 less than the originally-calculated value of this grant fund.

It is now timely and appropriate for the Council to approve the distribution of Equal Access Funds set aside for 2013-14 Partnership Grants in the total amount of \$1,518,000 pursuant to the Budget Act of 2013. These competitive, discretionary grants fund partnerships between legal aid organizations and the courts, for projects to help unrepresented litigants at or near the courthouse.

## **INTRODUCTION – THE BUDGET ACT**

The Equal Access Fund, initially created by the Budget Act of 1999, has been continued in each subsequent Budget Act, including the 2013 Budget Act. The Budget Act allocates Equal Access Funds to the Council for distribution of grants to legal services providers through the Commission. The budget also provides for funds for the cost of administration. A copy of the relevant portions of the Budget Act of 2013 is Attachment A.

Since 2005, the basic Equal Access Fund budget allocation has been supplemented with revenue generated through the Uniform Civil Fees and Standard Fee Schedule Act, approved by the Legislature and the Governor. That Act established a new distribution to the Equal Access Fund of \$4.80 per filing fee. The Equal Access Fund has been supplemented through these fees by amounts ranging from about \$2.5 to \$6.4 million annually.

Total projected grant year income available for distribution in 2013-2014, as reported in August, is as follows: (1) the basic budgetary allocation of \$10,392,000 pursuant to the Budget Act of 2013; (2) additional funding from the Uniform Civil Fees Act in the amount of \$5,482,000, less \$274,100 (5% for administration of funds) pursuant to the Budget Act of 2013; and (3) \$60,059 of undistributed prior-year EAF funding, for an estimated total of \$16,069,165.

Current filing fee receipts indicate the possibility that income for 2013-14, and adjustments for 2012-13, could total as much as \$890,000 less than originally estimated. Therefore, caution dictates that the sum available for Partnership Grants should be reduced by 10% of this anticipated shortfall.

The Budget Act establishes two kinds of grants for distribution, IOLTA-Formula Grants and Partnership Grants:

IOLTA-Formula Grants: At its August meeting, pursuant to the Budget Act of 2013, the Council approved distribution of \$14,462,250 to fund IOLTA-Formula Grants. These grants are allocated to eligible legal services projects according to a formula set forth in California's IOLTA statute. Additionally, an amount equal to 5% of the grants is set aside for administrative costs, shared by the State Bar of California and the Administrative Office of the Courts, in a total amount of \$774,100.

Partnership Grants: The Commission now requests that the Council approve distribution of the funds that have been 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." With the

deduction of approximately \$89,000 of anticipated filing fee shortfalls, total funds available for 2013-2014 Partnership Grants equal \$1,518,000.

The 2013-14 year will mark the fourteenth round of Partnership Grants. This report describes the process and criteria that the Commission uses to select the successful applicants, and provides information about the successful proposals, which are listed and described in Attachment B.

**Partnership Grants.** Only recipients of IOLTA and IOLTA-Formula Grants are eligible to apply for these grants, which are awarded to maximize the impact of this funding across areas of legal need, population types, and geographical regions. In the 2013-14 grant cycle, \$1,518,000 will be available for Partnership Grants for operations in calendar year 2014.

As set forth in detail below, the Partnership Grants process begins with evaluation of proposals by Legal Services Trust Fund Program staff and a committee of the Commission. This evaluation encompasses several criteria, including but not limited to ensuring the impartiality of the services and assurances of program effectiveness and fiscal stability. Partnership Grants are considered “seed money” to encourage new projects; consequently, grants for ongoing projects have in the past been reduced significantly after three years of Partnership funding, and have generally been terminated after five years unless extraordinary conditions dictated to the contrary, as defined by written commission protocols.

#### Request for Proposals

In August, the commission issued a Request for Proposals (RFP) for Partnership Grants to all programs currently receiving funding from the Legal Services Trust Fund Program. Notice of the RFP also was distributed to local court personnel. The RFP in Attachment C sets forth selection criteria.

#### 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 used 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.

In 1999, the Commission convened court staff, legal services program directors, and AOC staff to work with Trust Fund Program staff to develop grant-making processes and set criteria for partnership grants. This group concluded, and the Commission concurred, that it was important to give courts and legal services programs

considerable latitude to develop effective models to address the needs within their particular communities. Each round of grants funds a range of projects, including projects in both urban and rural areas and in larger and smaller counties, and those that address different areas of law. Grantees include both new and continuing projects.

In 2008, the Partnership Committee of the Trust Fund Commission reviewed and substantially reaffirmed most of the practices and priorities it had developed over the years for generating proposed allocations. However, the commission did determine to soften the practice of terminating funding after five years, and to consider continuation funding for a short additional time 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, there are also three projects that are being funded to continue services beyond their fifth year of service. These projects serve seriously under-resourced regions of California. Two of the projects operate from substantially rural areas, and one provides assistance on guardianship matters in a severely impact community.

As in past years, we 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 Memorandum of Understanding between the legal services programs and the cooperating court indicating how the joint project, the court, and any existing self-help center, including the family law facilitator (as appropriate), will work together.
- A plan for an appropriate level of direct supervision of paralegals and other support staff by a qualified attorney.
- A plan to anticipate and meet the needs of litigants who are not within the legal services provider's service area or are ineligible for their services.
- A plan to address the needs of unrepresented litigants who do not meet the financial eligibility requirements (e.g., by providing general information in the form of local information sheets, videos, workshops, etc.).
- A clearly stated policy regarding administration of financial eligibility standards, and established protocols to observe that policy.
- Protocols to minimize conflicts of interest, or to address them as needed;

- A plan for project continuity, including efforts to identify and secure additional funding within three years and to be free of Partnership support after five years.
- A multi-phase evaluation plan including such components as surveys, interviews, focus groups, courtroom observations, and file reviews, with a commitment to report on both qualitative and quantitative project results within three months of the end of the grant year.

Because all recipients of the Partnership Grants are organizations that already receive IOLTA and IOLTA-Formula Grants through the Legal Services Trust Fund Program, they are already subject to requirements for oversight and reporting that are in place. 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 who serve as advisors. 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 all Partnership Grant proposals and making funding recommendations 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 members of the Legal Services Trust Fund Commission and the members of its Partnership Grants Committee is provided in Attachment D.

Committee members were each assigned primary responsibility to review three or four applications, and were then divided into “evaluation teams” with a Trust Fund Program staff member providing support and background and conducting any necessary follow-up.

Committee members were given an evaluation form (Attachment E) which provided a structure for assessing 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, evaluation teams met by conference call to review all assigned proposals and to discuss specific concerns and issues with respect to individual projects. The full committee then met on November 1, 2013 to identify promising proposals and develop preliminary grant awards based on individual and team evaluations. This meeting also identified numerous issues for further investigation by Trust Fund staff.

The committee met again on the morning of November 15 to finalize its slate of grant recommendations, which was presented to the full commission for its approval that afternoon.

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 \$1,518,000 available in grants, the Commission received 35 applications totaling \$2,133,261. 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 23 of the 36 currently-funded projects, and from twelve projects that are seeking first-time funding. One project withdrew its application for a eighth year of funding; of the remaining 13 projects that did not seek refunding, six had already received five years of Partnership Grant support.

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

The recommended grants reflect a mix of geographic areas and 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:

| PROGRAM   | PROJECT   | GRANT AWARDS    |
|---|---|-----------------|
| <b>Asian Pacific Islander Legal Outreach</b>      | <b>Contra Costa County API Family Law Clinic</b>                          | <b>\$0</b>      |
| Asian Pacific Islander Legal Outreach             | Northern San Mateo County Restraining Order Clinic                        | \$50,000        |
| Bay Area Legal Aid                                | Contra Costa County Housing Law Clinic                                    | \$60,000        |
| Bet Tzedek Legal Services                         | Streamlining & Expanding Court-Based Conservatorship Clinics              | \$100,000       |
| Central California Legal Services, Inc.           | Elder Abuse Prevention and Conservatorship Project                        | \$75,000        |
| <b>Community Legal Services in East Palo Alto</b> | <b>San Mateo County Unlawful Detainer Mandatory Settlement Conference</b> | <b>\$50,000</b> |
| <b>East Bay Community Law Center</b>              | <b>Civil Justice Self-Help Project</b>                                    | <b>\$65,000</b> |
| Elder Law & Advocacy                              | Imperial Court Bilingual Conservatorship/Guardianship Clinic              | \$45,000        |
| Family Violence Law Center                        | Domestic Violence Self-Representation Assistance Project                  | \$23,000        |

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| Greater Bakersfield Legal Assistance, Inc.               | Orders Project in Kern   | \$50,000        |
| IELLA Legal Aid Project                                  | Small Claims Advocacy & Awareness Project                                      | \$25,000        |
| Justice & Diversity Center                               | Family Law Assisted Self Help Project  | \$50,000        |
| <b>Legal Aid Foundation of Los Angeles</b>               | <b>Long Beach Self-Help Legal Access Center</b>                                | <b>\$80,000</b> |
| Legal Aid of Marin                                       | Mandatory Settlement Conference Calendar                                       | \$45,000        |
| Legal Aid of Napa Valley                                 | Small Claims Assistance Project  | \$25,000        |
| Legal Aid Society of Orange County                       | Limited Conservatorship Clinic   | \$25,000        |
| <b>Legal Aid Society of Orange County</b>                | <b>Online Support for Self-Represented Parties in Family Law Matters</b>       | <b>\$0</b>      |
| <b>Legal Aid Society of Orange County</b>                | <b>Unlawful Detainer Clinic</b>  | <b>\$50,000</b> |
| <b>Legal Aid Society of San Diego</b>                    | <b>Civil Harassment &amp; Elder Abuse Restraining Order Program at the HOJ</b> | <b>\$60,000</b> |
| Legal Aid Society of San Diego                           | San Diego Conservatorship Assistance Project                                   | \$55,000        |
| Legal Assistance for Seniors                             | Partnership to Assist Guardianship Litigants                                   | \$30,000        |
| Legal Services of Northern California (Butte)            | Civil Harassment and Small Claims Mediation Project                            | \$30,000        |
| Legal Services of Northern California (Mother Lode)      | Mother Lode Pro Per Project  | \$58,000        |
| Legal Services of Northern California (Solano County)    | Solano County Restraining Order Clinic   | \$0             |
| Legal Services of Northern California (Yolo County)      | Consumer Assistance Project  | \$57,000        |
| Neighborhood Legal Services of Los Angeles County        | Chatsworth Consumer Debt Relief  | \$40,000        |
| <b>Neighborhood Legal Services of Los Angeles County</b> | <b>Pasadena Unlawful Detainer Assistance Project</b>                           | <b>\$60,000</b> |
| <b>Pro Bono Project Silicon Valley</b>                   | <b>Domestic Violence Limited Scope Representation Program</b>                  | <b>\$0</b>      |
| Pro Bono Project Silicon Valley                          | Family Court Settlement Project  | \$40,000        |
| <b>Public Counsel</b>                                    | <b>Pro Per Guardianship Clinic</b>   | <b>\$60,000</b> |
| <b>Public Law Center</b>                                 | <b>Orange County Expanded Domestic Violence Assistance Project</b>             | <b>\$50,000</b> |
| Public Law Center  | Orange County Spanish Language Self-Help Dissolution Workshops                 | \$60,000        |
| <b>San Diego Volunteer Lawyer Program</b>                | <b>North County Civil Harassment/ Unlawful Detainer Self-Help Clinic</b>       | <b>\$50,000</b> |

|                                |   |                    |
|--------------------------------|---|--------------------|
| Senior Citizens Legal Services | Conservatorship and Elder Abuse Project | \$0                |
| Watsonville Law Center         | Language Access to the Courts           | \$50,000           |
| <b>TOTAL GRANT AWARDS</b>      |   | <b>\$1,518,000</b> |

Highlights of each of project are listed in Attachment B.

**NEXT STEPS: TRUST FUND COMMISSION AND JUDICIAL COUNCIL**

*Legal Services Trust Fund Commission.* At its meeting on November 15, 2013, the Commission reviewed Partnership Grant proposals and selected projects for funding in the 2013-14 grant year.

The Commission and Legal Services Trust Fund Program staff will be responsible for the administration of these Equal Access Funds in tandem with IOLTA revenues and contributions to the Justice Gap Fund. The Commission will continue its oversight of the EAF grant program, including review of expenditure reports and program-owned evaluation. With respect to Partnership Grants, each recipient program must submit a year-of-year evaluation report after the close of the grant year that includes quantitative measurements of services provided, an accounting for its expenditure of grant funds, and a narrative report describing the results of the inquiries it had described in its evaluation plan.

*Judicial Council.* The Budget Act provides that “the Judicial Council shall approve awards made by the Commission if the Council determines that the awards comply with statutory and other relevant guidelines.” It is requested that the Council approve the distribution of \$1,518,000 in 2013-14 Partnership Grants to the projects, and in the amounts, identified in Attachment B.

**SUMMARY OF COUNCIL ACTION REQUESTED**

In conclusion, it is timely and appropriate for the Council to approve, at its December 2013 meeting, the distribution of \$1,518,000 in Partnership Grants pursuant to the Budget Act of 2013. Council approval in December is necessary to enable appropriate grant administration to fund projects for the period beginning January 1, 2014.

**Attachment A: Budget Control Language, Budget Act of 2013**

CHAPTER 20

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, to take effect immediately, budget bill.

[Approved by Governor June 27, 2013. Filed with Secretary of State June 27, 2013.]

AB 110, Blumenfield. Budget Act of 2013.

This bill would make appropriations for the support of state government for the 2013-14 fiscal year.

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

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 2013."

[...]

**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) 45.55.010-Child Support Commissioner Program .....                     | 54,332,000        |
| (3) 45.55.020-California Collaborative and Drug Court Projects .....       | 5,748,000         |
| (4) 45.55.030-Federal Child Access and Visitation Grant Program .....      | 800,000           |
| (5) 45.55.050-Federal Court Improvement Grant Program .....                | 700,000           |
| (6) 45.55.070-Grants-Other .....   | 745,000           |
| (7) 45.55.080-Federal Grants-Other .....                                   | 775,000           |
| <b>(8) 45.55.090-Equal Access Fund Program .....</b>                       | <b>10,392,000</b> |
| (9) Reimbursements .....   | -59,665,000       |
| (10) 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, the funds appropriated in Schedule (8) are to be distributed by the Judicial Council through the Legal Services Trust Fund Commission to qualified legal services projects and support centers as defined in Sections 6213 to 6215, inclusive, of the Business and Professions Code, to be used for legal services in civil matters for indigent persons. The Judicial Council shall approve awards made by the commission if the council determines that the awards comply with statutory and other relevant guidelines. Ten percent of the funds in Schedule (8) shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants and 90 percent of the funds in Schedule (8) shall be distributed consistent with Sections 6216 to 6223, inclusive, of the Business and Professions Code. The Judicial Council may establish additional reporting or quality control requirements consistent with Sections 6213 to 6223, inclusive, of the Business and Professions Code.

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.

[....]

**0250-101-0932--For local assistance, Judicial Branch, payable from the Trial Court Trust Fund ..... 2,194,425,000**

**Schedule:**

|  |                  |
|--|------------------|
| (1) 45.10-Support for Operation of the Trial Courts .....    | 1,758,927,000    |
| (2) 45.25-Compensation of Superior Court Judges .....        | 306,829,000      |
| (3) 45.35-Assigned Judges .....                              | 26,047,000       |
| (4) 45.45-Court Interpreters .....                           | 92,794,000       |
| (5) 45.55.060-Court Appointed Special Advocate Program ..... | 2,213,000        |
| (6) 45.55.065-Model Self-Help Program .....                  | 957,000          |
| <b>(7) 45.55.090-Equal Access Fund .....</b>                 | <b>5,482,000</b> |
| (8) 45.55.095-Family Law Information Centers .....           | 345,000          |
| (9) 45.55.100-Civil Case Coordination .....                  | 832,000          |
| (11) Reimbursements .....                                    | -1,000           |

*[Note: Item 10 does not appear in on-line versions of this bill.]*

**Provisions:**

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

2. 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. Prior to utilizing funds appropriated in Schedule (3), trial courts shall maximize the use of judicial officers who may be available due to reductions in court services or court closures.

3. The funds appropriated in Schedule (4) shall be for payments to contractual court interpreters, and certified or registered court interpreters employed by the courts for services provided during court proceedings and other services related to pending court proceedings, including services provided outside a courtroom, and the following court interpreter coordinators: 1.0 each in counties of the 1st through the 15th classes, 0.5 each in counties of the 16th through the 31st classes, and 0.25 each in counties of the 32nd through the 58th classes. For the purposes of this provision, "court interpreter coordinators" may be full- or part-time court employees, and shall be certified or registered court interpreters in good standing under existing law.

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).

4. 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.

5. 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.

6. 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.

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

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

9. Sixteen (16.0) subordinate judicial officer positions are authorized to be converted to judgeships in the 2013-14 fiscal year in the manner and pursuant to the authority described in subparagraph (B) of paragraph (1) of subdivision (c) of Section 69615 of the Government Code, as described in the notice filed by the Judicial Council under subparagraph (B) of paragraph (3) of subdivision (c) of Section 69615.

10. Notwithstanding any other provision of law, and upon approval of the Director of Finance, the amount available for expenditure in Schedule (1) may be increased by the amount of any additional resources collected for the recovery of costs for court-appointed dependency counsel services.

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

12. Of the amount appropriated in Schedule (1), \$60,000,000 shall be allocated by the Judicial Council to trial courts based on the funding methodology approved by Judicial Council on April 26, 2013.

Funding identified in this provision shall be made available to an individual trial court only upon receipt of a written plan meeting the following criteria:

(a) An individual court plan shall be submitted by the Administrative Office of the Courts to each fiscal and policy committee in each house of the Legislature responsible for court issues on or before September 1, 2013.

(b) An individual court plan shall only include activities intended to maintain or increase public access to justice.

On or after April 14, 2014, but in no event later than May 14, 2014, the Judicial Council shall file a written report to the appropriate fiscal and policy committees of the Legislature on how funds identified in this provision were or will be expended during the 2013-14 fiscal year.

14. Of the amounts appropriated in Schedule (1), \$325,000 shall be allocated by the Judicial Council in order to reimburse the California State Auditor for the costs of trial court audits incurred by the California State Auditor pursuant to Section 19210 of the Public Contract Code. No later than September 1, 2014, the Judicial Council shall report to the appropriate fiscal and policy committees of the Legislature on how the funding identified in this provision was allocated.

15. Not later than October 1, 2013, the Judicial Council shall adopt a rule regarding open meeting requirements that satisfies all of the following:

(a) The rule shall apply to any committee, subcommittee, advisory group, working group, task force, or similar multimember body that reviews issues and reports to the Judicial Council.

(b) The rule shall provide for telephonic access for any person who requests such access.

(c) The rule shall establish public notice requirements for any meeting of a body described in subdivision (a).

[...]

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                    | PROJECT NAME                                       | COUNTY       | NEW OR RETURNING APPLICANT | DESCRIPTION  | PROPOSED ALLOCATION |
|-----|---------------------------------------|--|--------------|----------------------------|--|---------------------|
| 1.  | ASIAN PACIFIC ISLANDER LEGAL OUTREACH | Contra Costa County API Family Law Clinic          | Contra Costa | New project                | With Partnership Grant funding, a family law clinic will be established at the courthouses in Richmond, Martinez and Pittsburg. This proposed project will serve pro per domestic violence petitioners and litigants seeking marital dissolution in a culturally and linguistically competent manner. Educational materials will be developed in Tagalog, Chinese and Vietnamese. Participating litigants will receive an overview of the legal process, filing requirements, effect of a domestic violence protective order or petition for dissolution. Litigants will receive assistance completing their paperwork. Court accompaniment will be provided for permanent restraining order hearings.     | \$0                 |
| 2.  | ASIAN PACIFIC ISLANDER LEGAL OUTREACH | Northern San Mateo County Restraining Order Clinic | San Mateo    | Second year                | This project provides culturally and linguistically competent domestic violence restraining order services for northern San Mateo County Asian and Pacific Islanders residents. The project will operate two weekly clinics, during which litigants will receive an overview of the requirements for a domestic violence protective order and the legal process to obtain an order. Litigants will receive assistance completing their paperwork. Completed forms will be couriered by project staff or volunteers to the Redwood City court for filing. The "runner" will return with TRO's for distribution to litigants. Court accompaniment will be provided for permanent restraining order hearings. | \$50,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME        | PROJECT NAME   | COUNTY       | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|---------------------------|--|--------------|----------------------------|---|---------------------|
| 3.  | BAY AREA LEGAL AID        | Contra Costa Housing Law Clinic                                | Contra Costa | Third year                 | The Clinic provides information, assistance, and referrals to low-income self-represented litigants (landlords and tenants) with legal issues related to landlord-tenant and unlawful detainer law. Assistance provided includes information on landlord and tenant rights and obligations, information on the UD process, document preparation for UD Judicial Council pleadings and other common pleadings, such as applications for a temporary stay of eviction, assistance with the submission and filing of the forms, and referrals to other social and legal service providers.   | \$60,000            |
| 4.  | BET TZEDEK LEGAL SERVICES | Streamlining and Expanding Court-Based Conservatorship Clinics | Los Angeles  | Second year                | <p>Legal access to conservatorships will be expanded via two delivery models.</p> <ul style="list-style-type: none"> <li>■ The capacity of existing self-help clinics will be increased through integration of pro bono attorneys who will review documents prepared by Bet Tzedek staff and conduct “group signings” of completed petitions at various locations throughout the county.</li> <li>■ Technology will be utilized to expand access to litigants in remote locations. Bet Tzedek and the Administrative Office of the Courts (AOC) have worked to complete the development of a computer program that will allow litigants to prepare the necessary forms on their own, with remote assistance provided by BT. Once finalized, the software program will be loaded on computers in the Antelope Valley Courthouse’s Self-Help Center.</li> </ul> | \$100,000           |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                      | PROJECT NAME                                       | COUNTY | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|---|--|--------|----------------------------|---|---------------------|
| 5.  | CENTRAL CALIFORNIA LEGAL SERVICES, INC. | Elder Abuse Prevention and Conservatorship Project | Fresno | Fifth year                 | The project provides services to self-represented petitioners and respondents and includes information and guidance on the necessary steps to obtain a restraining order or conservatorship. Other project services include assistance with new petitions and obtaining Letters of Conservatorship for self-represented litigants for general, dementia and limited conservatorships over the person and probate Code Section 2628 small estates. | \$75,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                         | PROJECT NAME   | COUNTY    | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|--|--|-----------|----------------------------|---|---------------------|
| 6.  | COMMUNITY LEGAL SERVICES IN EAST PALO ALTO | San Mateo County Unlawful Detainer Mandatory Settlement Conference | San Mateo | New project                | The mandatory settlement conference) process in San Mateo County provides both parties in an unlawful detainer action the opportunity to resolve their disputes without the pressure and risk of misunderstandings that make the trial stage so acrimonious and potentially harmful. CLSEPA's project will provide services to facilitate the resolution of cases. Court staff will send the calendar to CLSEPA several days before the MSC hearings to give the program time to run conflicts checks on all cases. At the MSC, CLSEPA attorneys and volunteers will offer advice to all indigent, self-represented tenants who request assistance; a contract attorney will provide assistance to all indigent, self-represented landlords. In addition to providing information and advice, project staff will provide limited scope representation (LSR) to a subset of litigants. Initially, LSR will be prioritized based on the needs of litigants—e.g., individuals who are limited English proficient and/or have a disability that impairs their ability to negotiate on their own behalf. | \$50,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME            | PROJECT NAME  | COUNTY   | NEW OR RETURNING APPLICANT | DESCRIPTION  | PROPOSED ALLOCATION |
|-----|-------------------------------|---|----------|----------------------------|--|---------------------|
| 7.  | EAST BAY COMMUNITY LAW CENTER | Civil Justice Self Help Project                               | Alameda  | New project                | The Civil Justice Self-Help Project will provide legal intervention where low-income litigants are facing potentially life-changing consequences such as the loss of their homes, wage garnishments, or termination of employment. Each clinic will be staffed by a team of EBCLC attorneys and clinical law students. At these workshops, legal advocates will provide one-on-one counseling with participants, under the supervision of attorneys. Litigants will be seen on an appointment basis.   | \$65,000            |
| 8.  | ELDER LAW & ADVOCACY          | Imperial Court Bilingual Conservatorship/ Guardianship Clinic | Imperial | Sixth year                 | The clinic offers bilingual full-service assistance to persons seeking conservatorships, limited conservatorships and guardianships or alternatives. Pro per litigants complete questionnaires designed to elicit all the information necessary for the staff attorney to prepare documents for filing a conservatorship or guardianship petition. Staff assists with service of notice, fee waivers, attends all probate proceedings, and assists with all court paperwork after the final hearing. Litigants are given Due Diligence Declaration templates listing ten steps that should be taken to locate persons entitled to receive notice when whereabouts are unknown. For conservatorship participants with fee waivers, the clinic takes responsibility for obtaining certified copies of final documents. | \$45,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                         | PROJECT NAME                                     | COUNTY  | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|--|--|---------|----------------------------|---|---------------------|
| 9.  | FAMILY VIOLENCE LAW CENTER                 | Domestic Violence Self-Representation Assistance | Alameda | Fourth year                | The DVSRA Project is a collaborative project of Family Violence Law Center (FVLC), Alameda County Bar Association Volunteer Legal Services (VLSC), and the Self-Help Center of the Alameda County Superior Court (SHC). The DVSRA Project provides paperwork assistance for pro per petitioners and respondents seeking to file or respond to petitions for temporary restraining orders. FVLC and VLSC volunteers provide assistance to petitioners at a clinic near the Hayward courthouse; VLSC assists respondents thru existing family law clinics in Fremont and Oakland.                 | \$23,000            |
| 10. | GREATER BAKERSFIELD LEGAL ASSISTANCE, INC. | Orders Project in Kern (OPIK)                    | Kern    | Fourth year                | This project offers 1:1 assistance to pro per litigants in family law cases to obtain and understand their Order After Hearing (OAH) and Judgment and proceed with next steps. An experienced project paralegal helps individual litigants prepare and file necessary paperwork and explains ramifications of new Rule of Court 5.125 that makes it more burdensome for pro per litigants. GBLA has produced a video in English and Spanish that helps litigants understand how a court order works. Courts in Delano and Mojave are also referring litigants to OPIK to complete their orders. | \$50,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME         | PROJECT NAME  | COUNTY                    | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|----------------------------|---|---------------------------|----------------------------|---|---------------------|
| 11. | IELLA LEGAL AID PROJECT    | Small Claims Advocacy and Awareness Project (SCAAP) | Riverside, San Bernardino | Second year                | SCAAP will conduct an all-day clinic at four locations each month. Clinics held at the San Bernardino Self Help Center will be conducted in Spanish. The clinics will focus on how to present a case in Small Claims Court and what happens after a hearing. The service model of the project will be three-session, all-day clinics: How to Present Your Claim (informational session); What Happens After Court (informational session); What Happens After Court Document Preparation Clinic | \$25,000            |
| 12. | JUSTICE & DIVERSITY CENTER | Family Law Assisted Self-Help Project (FLASH)       | San Francisco             | Fourth year                | Information and assistance on family law issues (dissolution, separations, annulments, paternity, custody, visitation, support). Service delivery includes three substantive modes - mediation between self-represented litigants to assist in the resolution of custody and support issues, in-depth assessment through 1:1 appointments, and more extensive assistance for those with particularly complex matters.   | \$50,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                  | PROJECT NAME  | COUNTY      | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|-------------------------------------|---|-------------|----------------------------|---|---------------------|
| 13. | LEGAL AID FOUNDATION OF LOS ANGELES | Long Beach Self-Help Legal Access Center                    | Los Angeles | New project                | The Self-Help Center provides individual assistance for family law, divorce, domestic violence issues (55%), housing (35%), civil complaints and harassment (8%) and civil complaints and debt collection matters (2%). One-on-one assistance will be offered to litigants with a last day UD answer and/or with affirmative defenses, and to those litigants with limited language or comprehension capacity. UD general denials will be handled in a workshop setting. An "introduction to the divorce process" workshop will be initiated to educate litigants about the process and what the court requires in advance to better prepare litigants to initiate a divorce action and to hopefully position the litigants to finish their cases timely and with no document rejection issues. | \$80,000            |
| 14. | LEGAL AID OF MARIN                  | Mandatory Settlement Conference Calendar -Unlawful Detainer | Marin       | Third year                 | The Marin UD-MSD Calendar is held every other Thursday. Court staff emails the calendar to Legal Aid of Marin ("LAM") on Tuesday to give the program time to check for potential conflicts, to contact parties who may have been clients of LAM, and to schedule pro bono attorneys for the UD-MSD Calendar. Staff and volunteer attorneys provide face-to-face negotiations with all parties authorized to settle the matter prior to trial. Settlements are confirmed on the record and memorialized in writing. Stipulations after the MSC, should it be unsuccessful, can also be drafted on behalf of the settling parties if they are both self-represented.  | \$45,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                 | PROJECT NAME  | COUNTY | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|------------------------------------|---|--------|----------------------------|---|---------------------|
| 15. | LEGAL AID OF NAPA VALLEY           | Small Claims Assistance Project                                   | Napa   | Third year                 | The Small Claims Assistance Project (SCAP) assists unrepresented, low-income individuals prepare the legal paperwork and court filings necessary to assert and defend matters in Small Claims Court.  | \$25,000            |
| 16. | LEGAL AID SOCIETY OF ORANGE COUNTY | Limited Conservatorship Clinic                                    | Orange | Third year                 | Services will be provided to individuals seeking assistance with a limited conservatorship. One educational workshop and one follow-up clinic will be held each month at the courthouse. In the introductory workshop a volunteer attorney will provide a general overview of limited conservatorships. The attorney will also distribute and explain the pleadings necessary to file for a limited conservatorship. In the second clinic, LASOC staff and volunteers will provide assistance with completing the necessary court forms. Case files will be opened and advice, counsel, and limited assistance will be given. | \$25,000            |
| 17. | LEGAL AID SOCIETY OF ORANGE COUNTY | Online Support for Self-Represented Parties in Family Law Matters | Orange | New project                | Direct online support to assist self-represented family law litigants in accessing, completing, and e-filing Smart Forms, through any internet connection or I-CAN! Portal. Triage to identify the appropriate forms and necessary information, assistance in completing and e-filing the forms with the Court, and information on next steps such as service requirements. Online assistance will also be used for existing court-run clinics, and clinics now being held at LASOC offices.  | \$0                 |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                   | PROJECT NAME  | COUNTY    | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|--------------------------------------|---|-----------|----------------------------|---|---------------------|
| 18. | LEGAL AID SOCIETY OF ORANGE COUNTY   | Unlawful Detainer Clinic  | Orange    | New project                | This clinic will serve pro per litigants facing eviction with an overview of the eviction process and help completing responsive pleading. E-filing will be encouraged. A general informational workshop will be provided three days a week, and two days a week selected and qualified litigants will receive direct assistance and advice during one-on-one clinics, including forms assistance and review of prior-completed forms.  | \$50,000            |
| 19. | LEGAL AID SOCIETY OF SAN DIEGO, INC. | Civil Harassment & Elder Abuse Restraining Order Program at the HOJ | San Diego | New project                | The proposed program will offer assistance with completion of Civil Harassment and Elder Abuse court forms, formulation of an accurate declaration of facts, and provide users with information and options relating to their cases. Services will be offered on a one-on-one basis for those petitioning for or responding to Civil and Elder Abuse TROs. The project will go beyond the confines of the clinic and offer outreach presentations at local schools, libraries and community centers on neighborhood, elder and school violence, TROs and alternatives to TROs such as creative problem solving and mediation. | \$60,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                   | PROJECT NAME                                 | COUNTY    | NEW OR RETURNING APPLICANT                       | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|--------------------------------------|--|-----------|--|---|---------------------|
| 20. | LEGAL AID SOCIETY OF SAN DIEGO, INC. | Conservatorship Assistance Project           | San Diego | Second year                                      | The project will run on a facilitator-type model and assist self-represented litigants with petitions for Conservatorship of the Person. Bilingual and bicultural staff and volunteers will provide one-on-one services on a "first-come first-serve" basis four half days per week. The project will offer assistance through the entire process, including help in correcting defects in the petition before filing and assistance after the hearing with additional forms and paperwork. The project will implement new Hot Docs software to allow volunteer attorneys to complete forms for clinic participants in their own offices. | \$55,000            |
| 21. | LEGAL ASSISTANCE FOR SENIORS         | Partnership to Assist Guardianship Litigants | Alameda   | Seventh year (not funded for one of these years) | Low-income and indigent litigants are given help with the procedural requirements of guardianships. Assistance is available to unrepresented parties who need help with the guardianship process. Services are provided by VLSC's pro bono attorneys on a day-of-court basis in Berkeley, and by LAS staff at the SHC in Oakland via workshops and referrals from the Clerk. Computerized programs and forms are available at the SHC site.   | \$30,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                    | PROJECT NAME   | COUNTY                               | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|---------------------------------------|--|--------------------------------------|----------------------------|---|---------------------|
| 22. | LEGAL SERVICES OF NORTHERN CALIFORNIA | Unlawful Detainer and Civil Harassment Mediation Project | Butte                                | Third year                 | The court refers eligible litigants to day-of-trial mediation for matters on the Civil Harassment and the Small Claims calendars. If an agreement is reached, a settlement agreement form is completed in accordance with the litigants' stated terms, signed by the litigants and filed with the court. If the case is not resolved, the case proceeds to trial with instructions from the attorney-mediators on next procedural steps. Another proven benefit is the wide range of underlying issues the mediated agreements can address often eliminating or reducing need for additional litigation. Opposing parties have concrete understandings of their respective obligations following the mediation. | \$30,000            |
| 23. | LEGAL SERVICES OF NORTHERN CALIFORNIA | Mother Lode Pro Per Project                              | Amador, Calaveras, El Dorado, Placer | Third year                 | The "road lawyer and paralegal" circuit ride to the clinic sites to provide one-on-one assistance in foreclosure, unlawful detainer, debt collection, general civil, small claims, family law as well as probate, guardianship and grandparent issues. Litigants are assisted in form completion, filing and preparation of orders after hearing.   | \$58,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                    | PROJECT NAME                                   | COUNTY | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|---------------------------------------|--|--------|----------------------------|---|---------------------|
| 24. | LEGAL SERVICES OF NORTHERN CALIFORNIA | Solano County Restraining Order Clinic (SCROC) | Solano | Eighth 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. Assistance includes help completing a detailed declaration of the abuse. Additional assistance in paternity, dissolution, and separation filings is provided to Vallejo residents. Spanish, Mandarin and American Sign Language translations are available.  | \$0                 |
| 25. | LEGAL SERVICES OF NORTHERN CALIFORNIA | Consumer Assistance Project                    | Yolo   | Fifth year                 | This clinic provides assistance with forms and pleadings assistance, discovery and settlement letters. Counseling and coaching, pre-trial and trial preparation- is offered 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. Litigants return for ongoing assistance due to complicated process required to resolve these matters. Services are available in Spanish. | \$57,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                                | PROJECT NAME                                  | COUNTY      | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|-----|---|---|-------------|----------------------------|---|---------------------|
| 26. | NEIGHBORHOOD LEGAL SERVICES OF LOS ANGELES COUNTY | Chatsworth Consumer Debt Relief               | Los Angeles | Second year                | NLSLA will (1) conduct consumer debt answer workshops, and (2) create an entirely-new workshop designed to address the need by low-income litigants for post-judgment assistance. The new workshop will focus on providing information on how to best navigate hearings on claims of exemption and debtor's examinations that occur as part of post-judgment activity. NLSLA's answer workshops help debtor's facing lawsuits make informed decisions as to whether to file an answer. If the litigant decides to file, assistance is provided in the preparation of the answer and all other required forms. | \$40,000            |
| 27. | NEIGHBORHOOD LEGAL SERVICES OF LOS ANGELES COUNTY | Pasadena Unlawful Detainer Assistance Project | Los Angeles | New project                | NLSLA seeks funding to resume its co-operation of the Self-Help Center in the Pasadena Courthouse and provide services to self-represented litigants with unlawful detainer matters. NLSLA plans to offer comprehensive self-help assistance in housing matters, family law matters and other civil areas. Project staff will help litigants prepare court forms and understanding court procedures and rules in English and other languages.   | \$60,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME              | PROJECT NAME   | COUNTY      | NEW OR RETURNING APPLICANT | DESCRIPTION  | PROPOSED ALLOCATION |
|-----|---------------------------------|--|-------------|----------------------------|--|---------------------|
| 28. | PRO BONO PROJECT SILICON VALLEY | Family Court Settlement Project                        | Santa Clara | Fourth year                | This project provides mediation and negotiated collaborative settlement services to parties who have filed or responded to Orders to Show Cause in custody or visitation matters. Judicial officers select cases on the self-represented Law and Motion calendars to receive this service. If the parties agree, one attorney meets with the moving party and another with the responding party to review issues. The parties all come together in a four-way discussion to narrow the issues. If an agreement is reached, the attorneys prepare stipulated orders to be entered by the Court. Complex matters and paternity cases have begun to be mediated although this reduced the numbers of cases completed at each session. | \$40,000            |
| 29. | PRO BONO PROJECT SILICON VALLEY | Domestic Violence Limited Scope Representation Project | Santa Clara | New project                | The Domestic Violence Limited Scope Representation Program focuses on providing legal representation to low-income litigants in Family Court DV matters. The goal and objective is to recruit, train and mentor attorney volunteers, in order to provide legal representation to low-income litigants in Family Court DV matters. Project staff will provide clients with legal representation through volunteer attorneys to resolve their custody, visitation, parentage and restraining orders.   | \$0                 |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME | PROJECT NAME  | COUNTY      | NEW OR RETURNING APPLICANT | DESCRIPTION  | PROPOSED ALLOCATION |
|-----|--------------------|---|-------------|----------------------------|--|---------------------|
| 30. | PUBLIC COUNSEL     | Pro Per Guardianship Clinic                                 | Los Angeles | New project                | The Clinic offers counsel and advice to pro per litigants about guardianships and other probate issues, including visitation petitions, objections to guardianships, setting up blocked accounts, and assistance with court approval to withdraw funds from blocked accounts, changing dependency court orders, orders to show cause, ex parte applications for those who need emergency court hearings, probate court orders of factual findings for Special Immigrant Juvenile Status (SIJS) visa applicants. Clinic attorneys assist with document preparation, review pleadings prepared by pro per litigants, provide instructions on notice requirements, and advice on appearing in court.                          | \$60,000            |
| 31. | PUBLIC LAW CENTER  | Orange County Expanded Domestic Violence Assistance Project | Orange      | New project                | The Expanded Domestic Violence Assistance Project will enhance and expand the scope of existing services to victims of domestic violence who seek restraining orders. Project staff will augment assistance already provided by the Domestic Violence Assistance Program and the Superior Court as well as initiate new features. PLC will use pro bono attorneys and trained law students to assist domestic violence victims write the declarations that accompany restraining orders. In addition, PLC will initiate regular weekly trainings to prepare self-represented domestic violence victims for restraining order hearings and will also place as many petitioners with private pro bono attorneys as possible. | \$50,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO. | PROGRAM LEGAL NAME                 | PROJECT NAME   | COUNTY    | NEW OR RETURNING APPLICANT | DESCRIPTION  | PROPOSED ALLOCATION |
|-----|------------------------------------|--|-----------|----------------------------|--|---------------------|
| 32. | PUBLIC LAW CENTER                  | Spanish Language Self-Help Dissolution Workshops                 | Orange    | Second year                | This project will be a partnership between the Public Law Center (PLC) and the Orange County Superior Court's Self-Help Services to provide assistance to the county's Spanish-speaking, self-represented litigants who require help completing and filing the necessary forms to obtain dissolution, legal separation, or nullity of marriage. A PLC Spanish-speaking attorney will teach a series of three workshops covering different stages of the dissolution process. The classes will be simultaneously transmitted to another courthouse by video remote equipment. A Spanish-speaking attorney will be present at NJC to assist individuals participating from that location. LawHelp is used to convert customer information into Judicial Council forms. | \$60,000            |
| 33. | SAN DIEGO VOLUNTEER LAWYER PROGRAM | North County Civil Harassment/Unlawful Detainer Self-Help Clinic | San Diego | New project                | The CHRO/UD provides advice and assistance in UD and civil harassment restraining order processes. Assistance includes completion of all necessary documents, information and advice regarding filing and service, legal rights and responsibilities of unlawful detainers, consequences of the CHTRO, trial preparation and potential resources for legal advocacy or assistance at the hearings. Staff has Spanish language capacity and materials are available in Spanish. 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.   | \$50,000            |

**2013-14 PARTNERSHIP GRANT PROJECTS**

| NO.                 | PROGRAM LEGAL NAME             | PROJECT NAME                                 | COUNTY                    | NEW OR RETURNING APPLICANT | DESCRIPTION   | PROPOSED ALLOCATION |
|---------------------|--------------------------------|--|---------------------------|----------------------------|---|---------------------|
| 34.                 | SENIOR CITIZENS LEGAL SERVICES | Conservatorship & Elder Abuse Project (CEAP) | Santa Cruz/<br>San Benito | Seventh year               | This project provides legal assistance, education and referral services to litigants seeking conservatorships, elder abuse restraining orders, and guardianships (especially for grandparent petitioners). Staff also assists 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.  | \$0                 |
| 35.                 | WATSONVILLE LAW CENTER         | Language Access to the Court Project         | Santa Cruz                | Sixth year                 | This project provides the Spanish-speaking community with access to the courts in a collaborative partnership with the court's Self-Help Center. A bilingual paralegal assists community members to obtain legal information and fill out court forms and pleadings. Areas of focus include family law, restraining orders, name changes, guardianship of the person, conservatorships, landlord/tenant, and small claims. The project also provides outreach and education to the Spanish-speaking community regarding access to the courts. | \$50,000            |
| TOTAL OF ALL GRANTS |                                |  |                           |                            |   | \$1,518,000         |

**Attachment C: Request for Partnership Proposals**  
**THE LEGAL SERVICES TRUST FUND PROGRAM**  
**EQUAL ACCESS FUND – PARTNERSHIP GRANTS**  
**2014 REQUEST FOR PROPOSAL**

**FORM A – PROJECT ABSTRACT**

1. **Project Name:** \_\_\_\_\_

2. **Program Name:** \_\_\_\_\_

3. **Program Contact:** \_\_\_\_\_

**Phone #:** \_\_\_\_\_ **Email:** \_\_\_\_\_

4. **Amount Requested: \$** \_\_\_\_\_

5. **Cooperating Court(s)\*:** \_\_\_\_\_

**Address, City, Zip:** \_\_\_\_\_

**Presiding Judge:** \_\_\_\_\_

**Phone #:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Other Court Contact  
and Title:** \_\_\_\_\_

**Phone #:** \_\_\_\_\_ **Email:** \_\_\_\_\_

❖ If more than one court is cooperating on this project, provide the requested information for each additional court on a separate sheet.

6. **Current Recipient of a Partnership Grant?**     Yes     No

Previous grant amounts (for this project only): 2009: \_\_\_\_\_

2010: \_\_\_\_\_

2011: \_\_\_\_\_

2012: \_\_\_\_\_

2013: \_\_\_\_\_

Partnership Grant funds remaining as of October 1, 2013: \_\_\_\_\_

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

**6. Summary.** Provide a description of the core aspects of your proposed project.

THE LEGAL SERVICES TRUST FUND PROGRAM  
EQUAL ACCESS FUND – PARTNERSHIP GRANTS  
2014 REQUEST FOR PROPOSAL

**FORM B – PROJECT NARRATIVE**

**Program Name:** \_\_\_\_\_

**Project Title:** \_\_\_\_\_

[See pages 4 through 10 of the RFP Instructions]

1. Program's Qualifications
  
2. Needs Assessment
  
3. Goals and Objectives
  
4. Types of Services
  
5. Evolution of the Project
  
6. Resources Available
  
7. Litigant Eligibility and Subject Matter Screening
  
8. Site and Accessibility
  
9. Staffing, Training and Supervision

**10. Technology and Equipment**

**11. Collaborative Planning with the Court**

**a.** Assurance of the Court's Impartiality and Independence

**b.** Ongoing Coordination

**c.** Clear Distinction Between Parts of Delivery System

**d.** Services Provided, Information and Referrals

**e.** Logistics

- Location/Hours
- Security
- Shared Space
- Equipment/Supplies

**f.** Project Continuity

**g.** Evaluation

**12. Collaborative Partners**

**13. Conflicts/Serving Both Sides/Attorney-Client Relationship (see instructions)**

Do you plan to establish an attorney-client relationship?  Yes  No

- a.** Protocol for conducting conflict checks (if applicable).
- b.** Explanation for serving one side only.
- c.** If serving both sides, state information provided to litigants regarding scope of services and lack of attorney-client relationship.

**14. Referral Protocols**

- a.** Commitments and arrangements with other entities.
- b.** Procedures and protocols.
- c.** Other means of addressing litigant needs.

**15. Timetable**

**16. Evaluation**

**17. Project Continuity**

THE LEGAL SERVICES TRUST FUND PROGRAM  
EQUAL ACCESS FUND – PARTNERSHIP GRANTS  
2014 REQUEST FOR PROPOSAL

**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 2013, 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 project for use on other activities, then applicant will submit to the Commission an explanation of the need for the other activities, justifying the alternate use of the funds.

**(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

---

Print Name

---

Print Name

---

Date

---

Date

THE LEGAL SERVICES TRUST FUND PROGRAM  
EQUAL ACCESS FUND – PARTNERSHIP GRANTS  
2012 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  
2012 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 October 31, 2013

**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 10, 2014**. Grant funds will not be disbursed without receipt of a fully-executed agreement.

**Continuing Projects** must 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 MOUs may be submitted subsequent to the Commission's approval of a Partnership Grant, but **no later than January 10, 2014**.

Status of MOU:

- Continuing MOU is enclosed and will be effective from January 1, 2014 through December 31, 2014.
- A new, fully-executed MOU is enclosed.
- A fully-executed MOU will be provided to the Trust Fund Program no later than January 10, 2014.

Program Name: \_\_\_\_\_

Project Title: \_\_\_\_\_

**C. 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 September 2, 2011

**D. 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 31, 2012**. 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 31, 2012**.

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 \_\_\_\_\_

**Attachment D:****MEMBERS OF THE LEGAL SERVICES TRUST FUND COMMISSION 2012-13****And Partnership Committee Members**

|  |  |
|--|--|
| <p>Adrian Dollard, Co-Chair<br/>Qatalyst Partners<br/>Three Embarcadero Center, 6th Floor<br/>San Francisco, CA 94111<br/>ph: (415) 844-7777      fx: (415) 391-3914<br/>email: <a href="mailto:aedollard@gmail.com">aedollard@gmail.com</a><br/>Attorney Member: 2008-2013<br/>Board of Trustees</p>  | <p>Deborah F. Ching<br/>Principal<br/>Nonprofit Consulting Group<br/>5416 Shenandoah Avenue<br/>Los Angeles, CA 90056<br/>ph: (310) 748-7940      fx: (310) 568-8631<br/>email: <a href="mailto:dfching@earthlink.net">dfching@earthlink.net</a><br/>Public Member: 2008-2011, 2011-2014<br/>Judicial Council</p>                              |
| <p>Donna Hershkowitz, Co-Chair<br/>Assistant Director, Office of Governmental Affairs<br/>Administrative Office of the Courts<br/>2255 N. Ontario Street<br/>Burbank, CA 91504<br/>ph: (818) 558-3068<br/>email: <a href="mailto:donna.hershkowitz@jud.ca.gov">donna.hershkowitz@jud.ca.gov</a><br/>Attorney Member: 2005-2011, 2011-2014<br/>Judicial Council</p> | <p>Mark R. Conrad<br/>U.S. Attorney's Office, Northern District of California<br/>450 Golden Gate Avenue, Box 36055<br/>San Francisco, CA 94102<br/>ph: (415) 436-7025      fx: (415) 436-6748<br/>email: <a href="mailto:mark.conrad@usdoj.gov">mark.conrad@usdoj.gov</a><br/>Attorney Member: 2012-2013, 2013-2016<br/>Board of Trustees</p> |
| <p>Christina S. Stokholm, Co-Vice Chair<br/>Law Offices of Mark Pachowicz<br/>771 East Daily Drive, Suite 230<br/>Camarillo, CA 93010<br/>ph: (805) 987-4975      fx: (805) 987-4980<br/>email: <a href="mailto:christina@pachowicz.com">christina@pachowicz.com</a><br/>Attorney Member: 2011-2014<br/>Board of Trustees</p>                                      | <p>Corey N. Friedman<br/>California Department of Industrial Relations<br/>455 Golden Gate Avenue, Suite 9328<br/>San Francisco, CA 94102<br/>ph: (415) 703-4554      fx: (415) 520-0452<br/>Attorney Member: 2013-2015<br/>Board of Trustees</p>  |
| <p>Judge John A. Sutro, Jr., Retired, Co-Vice Chair<br/>P. O. Box 641<br/>Kentfield, CA 94914<br/>ph: (415) 453-5878      fx: (415) 453-4465<br/>email: <a href="mailto:jasutro@msn.com">jasutro@msn.com</a><br/>Attorney Member: 2010-2013<br/>Board of Trustees</p>  | <p>Mollie Gomez<br/>11839 Allard Street<br/>Norwalk, CA 90650<br/>ph: (562) 868-2422      fx: (714) 571-5270<br/>email: <a href="mailto:molecue8@aol.com">molecue8@aol.com</a><br/>Public Member: 2010-2013, 2013-2016<br/>Board of Trustees</p>   |
| <p>Banafsheh Akhlaghi<br/>NLSCA<br/>35 Miller Avenue #113<br/>Mill Valley, CA 94941<br/>ph: (925) 209-7136<br/>email: <a href="mailto:bakhlaghi1600@gmail.com">bakhlaghi1600@gmail.com</a><br/>Attorney Member: 2010-2013; 2013-2016<br/>Judicial Council</p>  | <p>Emily Harpster<br/>United Way of the Bay Area<br/>221 Main Street, Suite 300<br/>San Francisco, CA 94105<br/>ph: (415) 808-4333      fx: (415) 817-4655<br/>email: <a href="mailto:eharpster@uwba.org">eharpster@uwba.org</a> (private)<br/>Public Member: 2012-2015<br/>Board of Trustees</p>  |
| <p>Tamara Lynn Beard<br/>c/o Legal Services Trust Fund Program<br/>180 Howard Street<br/>San Francisco, CA 94105-1617<br/>email: <a href="mailto:tamarabeard1@gmail.com">tamarabeard1@gmail.com</a><br/>Attorney Member: 2011-2014<br/>Judicial Council</p>  | <p>Parishh Knox<br/>Best Best &amp; Krieger LLP<br/>300 S. Grand Avenue, 25<sup>th</sup> Floor<br/>Los Angeles, CA 90071<br/>ph: (213) 787-2574      fx: (213) 617-7480<br/>email: <a href="mailto:parishh.knox@bbkllaw.com">parishh.knox@bbkllaw.com</a><br/>Attorney Member: 2013-2016<br/>Board of Trustees</p>                             |

|   |   |
|---|---|
| <p>Richard G. Reinis<br/> Steptoe &amp; Johnson, LLP<br/> 2121 Avenue of the Stars, Suite 2800<br/> Los Angeles, CA 90067<br/> ph: (310) 734-3200      fx: (310) 734-3300<br/> email: <a href="mailto:rrainis@steptoe.com">rrainis@steptoe.com</a><br/> Attorney Member: 2011-2014<br/> Judicial Council</p>                                | <p>Chen Song<br/> Nathan Associates, Inc.<br/> 3 Park Plaza, Suite 1980<br/> Irvine, California 92614<br/> ph.: (949) 474-4938      fx: (949) 474-4944<br/> email: <a href="mailto:csong@nathaninc.com">csong@nathaninc.com</a><br/> Public Member: 2013-2016<br/> Board of Trustees</p>  |
| <p>LaQuita (Mary) Robbins<br/> c/o Legal Services Trust Fund Program<br/> 180 Howard Street<br/> San Francisco, CA 94105-1617<br/> email: <a href="mailto:squiry9515@gmail.com">squiry9515@gmail.com</a><br/> Public Member: 2010-2013, 2013-2016<br/> Board of Trustees</p>  | <p>Melissa L. White<br/> Landau &amp; White Law Offices, LLP<br/> 7571 North Remington Avenue, Suite 104<br/> Fresno, CA 93711<br/> ph: (559) 476-1696      fx: (559) 840-1518<br/> email: <a href="mailto:melissa@landauandwhitelaw.com">melissa@landauandwhitelaw.com</a><br/> Attorney Member: 2011-2014<br/> Board of Trustees</p>  |
| <p>Susan D. Ryan<br/> Superior Court of California,<br/> County of Riverside<br/> P. O. Box 1547<br/> Riverside, CA 92502<br/> ph: (951) 777-3840      fax: (951) 777-3841<br/> email: <a href="mailto:susan.ryan@riverside.courts.ca.gov">susan.ryan@riverside.courts.ca.gov</a><br/> Attorney Member: 2012-2015<br/> Judicial Council</p> |   |
| <p>Kim Savage<br/> Law Office of Kim Savage<br/> P. O. Box 41580<br/> Long Beach, CA 90853<br/> ph: (562) 930-1113      fx: (562) 930-0003<br/> email: <a href="mailto:kimsavage@verizon.net">kimsavage@verizon.net</a> (private)<br/> Attorney Member: 2012-2015<br/> Board of Trustees</p>  | <p style="text-align: center;"><b><u>ADVISORS</u></b></p> <p>Hon. Michael J. Convey<br/> Superior Court of California, County of Los Angeles<br/> Northwest District, Department K<br/> 6230 Sylmar Avenue<br/> Van Nuys, CA 91401<br/> ph: (818) 374-2230<br/> email: <a href="mailto:mjconvey@lasuperiorcourt.org">mjconvey@lasuperiorcourt.org</a><br/> Judge: 2012-2015<br/> Judicial Council</p> |
| <p>Christian Schreiber<br/> Chavez &amp; Gertler LLP<br/> 42 Miller Avenue<br/> Mill Valley, CA 94941<br/> ph: (415) 381-5599      fx: (415) 384-5572<br/> email: <a href="mailto:christian@chavezgertler.com">christian@chavezgertler.com</a><br/> Attorney Member: 2013-2016<br/> Board of Trustees</p>                                   | <p>Hon. Faye D'Opal<br/> Superior Court Judge, Marin County<br/> P. O. Box 4988<br/> San Rafael, CA 94913-4988<br/> cell: (415) 497-4209; (415) 444-7258 (Chambers)<br/> email: <a href="mailto:faye_dopal@marincourt.org">faye_dopal@marincourt.org</a><br/> Judge: 2011-2014<br/> Judicial Council</p>  |
| <p>Melanie Snider<br/> Superior Court of California, County of Butte<br/> One Court Street<br/> Oroville, CA 95965<br/> ph.: tba<br/> email: <a href="mailto:msnider@buttecourt.ca.gov">msnider@buttecourt.ca.gov</a><br/> Judge: 2013-2016<br/> Judicial Council</p>   | <p>Hon. William J. Murray, Jr.<br/> Associate Justice of the Court of Appeal<br/> Third Appellate District<br/> 914 Capitol Mall, 4<sup>th</sup> Floor<br/> Sacramento, CA 95814<br/> ph.: tba<br/> email: <a href="mailto:william.murray@jud.ca.gov">william.murray@jud.ca.gov</a><br/> Judge: 2013-2016<br/> Judicial Council</p>   |

**PARTNERSHIP GRANTS COMMITTEE**

| <b>Christina Stokholm (2014) Co-Chair</b> | <b>Melissa White (2014) Co-Chair</b> |
|---|--------------------------------------|
| Tamara Beard (2014)                       | Justice William Murray (2016)        |
| Judge Michael Convey (2015)               | Susan Ryan (2015)                    |
| Corey Friedman (2016)                     | Christian Schreiber (2016)           |
| Mollie Gomez (2016)                       |                                      |
| Donna Hershkowitz (2014)                  |                                      |

**Attachment E: Partnership Grant Committee Proposal Evaluation Form**

**EVALUATION FORM - PARTNERSHIP GRANTS**

NAME OF APPLICANT:

COUNTY(IES):

NAME OF EVALUATOR:

DATE:

**TYPE OF PROJECT** (Check all that apply):

- GENERAL CIVIL
- CONSERVATORSHIP
- DOMESTIC VIOLENCE/CIVIL HARASSMENT/RESTRAINING ORDER
- ELDER LAW
- EXPUNGEMENT
- FAMILY LAW
- GUARDIANSHIP
- LANDLORD/TENANT
- LANGUAGE ACCESS
- OTHER:

**BASIC REQUIREMENTS:**

Yes

No

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Legal Services Trust Fund Program recipient.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Joint court/legal services project located at or near the courthouse.                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Indigent clients/screening mechanism described.                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | Self-represented litigants (no attorney representation anticipated with these funds). |
| <input type="checkbox"/> | <input type="checkbox"/> | 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. (Section 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 or carryover from prior year? 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 addresses collaboration with cooperating court as well as Self-Help Center and Family Law Facilitator staff and other offices of the court? Other local legal services providers? Ongoing coordination? Describes plans to avoid confusion for pro per users of services? Assurance of court's impartiality and independence?

\_\_\_\_\_ 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: