

2019 Bank Grant Budget Revision and Carry-Over Requests

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As prepared for the LSTFC Bank Grants Committee Meeting, February 22, 2019								
No.	Program Name	Project Name	Date Submitted	Budget Modification Amount	Carry-Over Amount	Total Annual Grant	% of Grant	Comments
1	Alameda County Bar Volunteer Legal Services	Community and Business Resiliency Project - "Start Small Bay Area"	9/7/2018	\$ 19,000	N/A	\$ 120,000	15.83%	Increasing Salaries & Wages for Attorneys (\$2,000) and Paralegals (\$17,000) and reducing Space (\$10,220) and Employee Benefits (\$8,780). Paralegal position is also the Program Manager. Both positions increased to 90%. No changes to proposed activities, objectives, or strategies.
2	California Indian Legal Services	Native American Record Clearing (NARC) Project	9/7/2018	\$ 8,524	N/A	\$ 41,540	20.52%	Almost all budget line items have been revised. Including Administrative costs, there is a \$5,860 shift from Personnel to Non-Personnel expenses. <b>Non-Personnel ratio of 31% exceeds 25% standard maximum.</b> There are no Contract Services included in Non-Personnel expenses. Changes that exceed \$1,000 include decreases in Attorneys (\$4,370) and Other Staff (\$2,346); and increases in Other (\$3,324), Paralegal (\$2,124), and Program Travel (\$2,024). Increase in Other explained as \$40 Livescan cost for 80 individuals. Travel expense explained as 4 trips for 3 people @ \$750 per trip. No changes to proposed activities, objectives, or strategies.
3	California Indian Legal Services	Strengthening Tribal Communities through Economic Development	8/2/2018	\$ 11,928	\$ 11,928	\$ 100,000	11.93%	This is a request to transfer the unused balance from a 2017 grant to their current Native American Record Clearing grant listed above. <b>Staff recommendation is to not approve this request, especially considering that the current grant also has a 20.52% carry over request.</b>
4	California Rural Legal Assistance Foundation	The California Housing Equity & Inclusion Initiative	9/7/2018	\$ 55,559	N/A	\$ 200,000	27.78%	Elimination of \$52,000 Sub-Recipient allocation with increases in Total Personnel (\$36,590), Non-Personnel (\$11,775) and Total Administrative (\$3,635). Increase in Personnel is divided between Attorneys (\$33,250) and Employee Benefits (\$6,674) less a reduction in Other Staff (\$3,334). \$12,000 added to Contract Services for contract attorney. Revised Personnel costs are 77.3% and Administrative costs are 8.6%. FTEs increased from 1.65 to 2.20. Grant goals and objectives remain unchanged.
5	Elder Law & Advocacy	Mortgage Foreclosure Prevention and Assistance for Seniors	9/6/2018	\$ 6,013	N/A	\$ 130,000	4.63%	This budget modification does not require approval as it falls within allowable variances. There is a net \$43 reduction in Total Personnel and corresponding increase in Non-Personnel. Increase is in Attorneys (\$4,580). Decreases are in Employee Benefits (\$2,786), Other Staff (\$1,837), and Program Travel (\$1,290). No changes to proposed activities, objectives, strategies, or goals.
6	Greater Bakersfield Legal Assistance	Phase 2 - Neighborhood Revitalization	9/7/2018	N/A	\$ 46,817	\$ 225,000	20.81%	Revised budget of \$271,817 is presumably \$46,817 greater than grant based on projected carry-forward of 2018 funds. 2 attorneys on this program left for jobs in LA. Total Personnel increased \$49,168, while Non-Personnel decreased \$2,891. Personnel increase divided between Attorneys (\$51,111) and Employee Benefits (\$7,559) less elimination of Paralegals (\$9,502). FTEs increased from 1.95 to 2.65. Non-Personnel decrease is mostly in Litigation (\$2,771). No changes to proposed activities, objectives, strategies, or goals.
7	Justice & Diversity Center of the Bar Association of San Francisco	Systemic Change & Empowerment for Immigrant Tenants	9/14/2018	\$ 1,043	N/A	\$ 25,000	4.17%	This budget modification does not require approval as it falls within allowable variances. All line item changes are less than \$1,000.
8	Law Foundation of Silicon Valley	Silicon Valley Community Redevelopment Legal Assistance	9/7/2018	\$ 15,565	N/A	\$ 150,000	10.38%	Net decrease in Personnel of \$2,615 and increase in Non-Personnel of \$2,935. Non-Personnel at 14.6% remains well below standard maximum (25%). Increases are in Attorneys (\$9,735), Space (\$2,520), Other (\$1,450), and Employee Benefits (\$1,030). Decrease is in Paralegals (\$13,380). Virtually no change in overall FTEs. Training deliverable removed. Focus on preservation of current affordable housing rather than financing and creation of new housing.
9	Legal Aid at Work	Disability Community Redevelopment Through the ADA	9/7/2018	\$ 22,700	N/A	\$ 120,000	18.92%	Total Personnel increased \$19,356 with same decrease to Non-Personnel. FTEs (all Attorneys) increase from 0.65 to 0.80. Increases divided between Attorneys (\$15,486), Employee Benefits (\$3,870), and Space (\$3,344). Decreases are in Litigation (\$14,000), Program Travel (\$4,500), Other (\$3,000), and Printing & Postage (\$1,200). No changes to proposed activities, objectives, strategies, or goals.
10	Legal Aid of Sonoma County	Housing Preservation Project	11/15/2018	\$ 25,081	\$21,000 to \$26,000	\$ 175,000	12% to 14.9%	2019 Budget total is \$181,000 including \$6,000 carry-over, which is 3.4% of the original grant amount. Request to carry-over another \$15,000 to \$20,000 from 2018 to use in 2020. For 2019, Non-Personnel increased \$24,003, with the majority of increase (\$21,800) in Contract Services to Clients. Adjusting for Contract Services, Non-Personnel costs are 13.5% of the portion of the grant not being sub-granted (\$111,000). Personnel costs are decreased \$19,658, with the majority in Attorneys (\$16,116).

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11	Legal Assistance for Seniors	Housing Community Education & Policy Development	9/1/2018	\$ 4,814	N/A	\$ 25,000	19.26%	Total Personnel decreased \$1,375 with \$1,333 increase in Total Administrative. Revised Administrative cost is 6.9% and Personnel is 83%. Decrease is in Attorneys (\$3,916). Increases are in Other Staff (\$2,639) and Administrative-Personnel (\$1,233). No changes to proposed activities, objectives, strategies, or goals.
12	Center for Gender & Refugee Studies	Expanding Critical Avenue for Legal Status for CA Immigrants Through Strategic Litigation of Gang Based Asylum Cases	12/20/2018	\$ 20,024	N/A	\$ 125,000	16.02%	Total Personnel increased \$20,024 with \$19,822 decrease to Non-Personnel. Lawyers increase \$13,250 to one FTE, and Employee Benefits increases \$4,670 based on Lawyer increase. Most of the decrease is in Litigation (\$18,400), which is reduced to \$10,000 based on projection of expert witness and translation/interpretation services costs.
13	Central California Legal Services	Housing Element Advocacy & Litigation	12/21/2018	\$ 85,287	\$ 63,032	\$ 275,000	31.01%	Total Personnel decreased \$22,255. Total Administrative increased \$76,652 and Non-Personnel increased \$8,635. Lawyers decrease \$9,127; Other Staff increase \$8,632; and Employee Benefits decrease \$21,760. Administrative cost is 22.7% of total. Non-Personnel increases primarily in Training (\$4,609); Library (\$1,584), and Space (\$1,414). Legal Director's time reduced from 40% to 25% and Housing Team Leader's time reduced from 50% to 35%, without any expected reduction in program deliverables. Health insurance costs are lower than projected.
14	Harriett Buhai Center for Family Law	Bank Grant RFP Application	12/21/2018	\$ 11,561	\$ 10,178	\$ 34,320	33.69%	Total Personnel increased \$11,151. Total Administrative decreased \$1,383 and Non-Personnel increased \$410. Lawyers increase \$5,892; Other Staff increase \$4,162; and Employee Benefits increase \$2,127. Administrative cost reduced to 12.9% of total. Non-Personnel increased to 13.1%. Due to staffing issues there were delays in initiating the project resulting in utilizing less money than planned during the 1st year of the grant.
15	Santa Clara University Alexander Law Center	Foreclosure Prevention Project	12/21/2018	\$ -	\$ -	\$ 25,000	0.00%	Since 2018 was the first year of the foreclosure prevention work we learned a great deal about the needs of low-income homeowners in Santa Clara County including how the Law Center can best serve. Our staffing and service delivery model will not change. However, we anticipated clients would seek our help with loan modifications and perhaps affirmative matters; few consumers sought our services in those areas. Although, we may still assist in some way with loan modifications we want to focus our efforts and project deliverables where we are most effective. Thus, the foreclosure prevention project description will be modified to assist current homeowners affected by or at risk of foreclosure and former homeowners with the economic aftereffects of foreclosure, including debt relief, credit repair assistance, and asset building activities.