



**Eligibility Category:** LSP

**Grant Year:** 2021

**Due Date:** March 16, 2020 5:00pm PST

**Prepared by:** [Catherine Borgeson](#)

**Email:** [Catherine.Borgeson@calbar.ca.gov](mailto:Catherine.Borgeson@calbar.ca.gov)

**Contact Phone:** 415-538-2021

**Funding Opportunity:** Partnership Grants

**Project Title:** Test PG 2021

**Program Name:** Test BriCo Legal Services234

**Applicant Title:** Senior Program Analyst

**Address:** 180 Howard Street 5th Floor

**City:** San Francisco

I verify the information in the Organization Profile is accurate and up to date.

I verify that I have read, and am familiar with, the eligibility requirements and funding criteria for Partnership Grants.

## Form A - Project Profile

**1. Application Contact:** contact

**Job Title:** test

**Email:** test@gmail.com

**Telephone:** 4153453444

### County(ies) Served by this Project

Butte

**3. Total Amount** \$40,000

**Requested:**

Request project amounts  
divisible evenly by 1,000.



**County    Branch (If Applicable)    Address    On-Site Days/Hours    Total Hours/Month**

**5. Is the project currently in operation, regardless whether funded by a Partnership Grant?**

An existing project would be considered “new” or not currently funded, if the proposal indicates a change to the location of the host court, or a significantly change to its substantive focus.

Yes

**5.a. Current Project Summary**

Provide a brief summary of services provided to date in the current year, with any relevant highlights, benchmarks, challenges, etc. What changes have been made to the project over the past year, and what changes are anticipated over the year for which funding is sought? (250 word limit)

test

**5.b. Is the project currently funded by a Partnership Grant?**

Yes

**Select Project for 2020 - Test Refunding:**

**Number of years this 2 project has been currently funded by a Partnership Grant:**

**6. Project Abstract: Describe the core aspects of your proposed grant project, including the legal area to be addressed; the target constituency; the type(s) of services to be provided; the location and hours of operation for this project; project staffing; general nature of court participation; and main goals.**

This abstract will be submitted in summaries provided to the Legal Services Trust Fund Commission and the Judicial Council, as well as it is pulled into the Letter of Support template on Form F of this application. (250 word limit)

test test test test

**7. Substantive Area(s)**



Health and Long-term Care, Income Maintenance, Other

**7.a. Explain "Other":**

## Form B - Project Description

**1. Program's Qualifications: What is the applicant program's experience providing assistance to self-represented litigants, including court-based services? (250 word limit)**

test

**2. Needs Assessment: Describe the demographics of the target community, the geographic area to be served by the project, and why the target population is in particular need of the services to be provided. (250 word limit)**

test

**3. Types of Services to be Provided: Describe the legal issues to be addressed and the type and level of services to be offered by the project. (250 word limit)**

test

**Number of Individual Services    Number of Workshops    Individuals to be Served at Workshops/Group Activities**

**4.a. Describe the format for any workshops, including any use of video conference or electronic document assembly, and the goal for each type of workshop. (250 word limit)**

**4.b. Identify any new resource materials to be developed, who will be responsible for preparing those materials, and how they differ from materials already posted, i.e., at [www.courts.ca.gov](http://www.courts.ca.gov). (250 word limit)**

**4.c. Other**

Identify any further or additional project goals, not identified above. (250 word limit)



## 5. Community Engagement

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**5.a. Outreach:** Describe how you will communicate the availability of services to litigants and the community. (250 word limit)

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test

**5.b. Language Access:** Describe language capabilities among staff, including resources for translation services if necessary for serving the target population. (250 word limit)

---

test

**5.c. Describe current and planned coordination and collaboration on this project with existing court-based services, other legal services providers, or other community organizations. (250 word limit)**

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fine.

## 6. Quality Control

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**6.a. Staffing Structure:** Identify key personnel involved in staffing and supervising this project. If supervision is not being provided on-site, describe the steps that will be taken to ensure quality control. (250 word limit)

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test

**6.b. Supervision of Volunteers:** Identify any volunteers to be utilized, their anticipated role, and how they will be trained and supervised. (250 word limit)

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test

**6.c. Pro Se Document Review:** How will the project ensure that documents are completed correctly? Who will conduct the review and when? (250 word limit)

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test

**6.d. Sub-Grants:** Provide details for any sub-grant(s), including plans for oversight and evaluation of the services provided by the sub-grantee. (250 word limit)

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test

## 7. Eligibility for Services

**7.a. Identify all criteria and guidelines used to establish eligibility for services and how the project screens for eligibility for services. (250 word limit)**

test

**7.b. Identify any resources or referrals to be provided to litigants who are not eligible for this project's services. (250 word limit)**

This response will be included in the Letter of Support template on Form F of this application.

tester

**7.c. Partnership Grants may only be used for services provided to indigent individuals, as defined at Business & Professions Code Section 6213(d). How will the organization ensure Partnership Grant funds will only be used to provide services to indigent individuals? (250 word limit)**

**8. Attorney-Client Relationship: Will this project establish an attorney-client relationship?**

Yes

**8.a. Describe how project staff will check for client conflicts, and how individuals will be served if a conflict is identified, i.e., referrals to a conflict panel, independent contractor, etc. (250 word limit)**

This response will be included in the Letter of Support template on Form F of this application.

test 123

**8.a. Explain how litigants will be made aware of the scope of services to be provided and that no attorney-client relationship will be established. (250 word limit)**

This response will be included in the Letter of Support template on Form F of this application.

**9. Impartiality of the Court: Will this project serve only one party or side of a matter?**

Yes

**9.a. Identify which side will be served, and why the project has established this limitation? What are the social implications of this decision? How will this project address any risk to the appearance of the court's impartiality as a result of limiting services to one side of these matters? (250 word limit)**

This response will be included in the Letter of Support template on Form F of this application.

**10. Partnership with the Host Court**

(A formal letter of support and memorandum of understanding must be uploaded to Form F; see the instructions for detailed information about these documents.)

**10.a. Facilities; Access; In-Kind Support: Identify all space and material resources being provided by the court, and any special access to facilities or data to be provided to the project or its staff. (250 word limit)**

test

**10.b. Regular Meetings: Project staff should meet no less than quarterly with key court partners, with a formal agenda. Identify the schedule for these meetings, who is expected to participated, and any issues currently to be resolved. (250 word limit)**

test

**10.c. Evaluation Support: The court is considered to be an equal partner in ensuring that the funded services are meaningfully evaluated. Identify the court's role in evaluating this project. (250 word limit)**

test

**10.d. Additional Components of the Court's Partnership: If there are any aspects of the court's partnership that have not been identified above. (250 word limit)**



**11. New Project Implementation Timetable:** For projects that are not currently in operation, or that propose significant changes to existing operations, describe the proposed timetable for implementation of the project or revisions by quarter for the grant year. (250 word limit)

## 12. Evaluation

Projects must submit detailed reporting and evaluation materials after each grant year. These will include an expenditures report, information on the demographics of clinic customers, findings from client satisfaction surveys, a report on meetings with court partners, and at least one additional evaluation modality.

**Upload a copy of the Satisfaction Survey now in use, or a proposed survey to be implemented in the coming grant year:**

**Sample\_PDF\_for\_Testing.pdf**

2.8 KB - 02/05/2020 5:10pm

Total Files: 1

**12.a. Describe how the survey will be distributed, and how data will be gathered and analyzed. (250 word limit)**

test

**12.b. Identify at least one additional evaluation methodology to be used in assessing the impact or efficacy of this project's services. (250 word limit)**

test

## 13. Project Continuity

Partnership Grant policy prioritizes funding for new and rural projects; funding is typically terminated after no more than five consecutive years.

**13.a. Describe plans to obtain funding that will sustain this project's services beyond the typical Partnership Grant funding cycle. (250 word limit)**

test



**13.b. List all funding sources that have been explored or pursued for this Partnership Grant project in the last twelve months. Specifically identify applications submitted, amounts requested, revenue raised for project operations, and any funds that were obtained by leveraging the Partnership Grant. This section may also be used to explain any barriers to pursuing funds. (250 word limit)**

test

## Form C - Project Budget

### Program Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
1. Lawyers	\$1	\$0	\$0	\$1
2. Paralegals	\$0	\$0	\$0	\$0
3. Other Staff	\$0	\$0	\$0	\$0
SUBTOTAL	\$1	\$0	\$0	\$1
4. Employee Benefits	\$0	\$0	\$0	\$0
TOTAL PROGRAM PERSONNEL	\$1	\$0	\$0	\$1

### Program Non-Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
5. Space	\$0	\$0	\$0	\$0
6. Equipment Rental and Maintenance	\$0	\$0	\$0	\$0
7. Office Supplies	\$0	\$0	\$0	\$0
8. Printing and Postage	\$0	\$0	\$0	\$0
9. Telecommunications	\$0	\$0	\$0	\$0
10. Technology	\$0	\$0	\$0	\$0
11. Program Travel	\$0	\$0	\$0	\$0
12. Training	\$0	\$0	\$0	\$0
13. Library	\$0	\$0	\$0	\$0
14. Insurance	\$0	\$0	\$0	\$0



15. Evaluation	\$0	\$0	\$1	\$1
16. Contract Service to Clients	\$0	\$0	\$0	\$0
17. Other	\$0	\$1	\$0	\$1
TOTAL PROGRAM NON-PERSONNEL	\$0	\$1	\$1	\$2
TOTAL PROGRAM	\$1	\$1	\$1	\$3
<b>Administrative and Overhead</b>				
18. Admin Personnel	\$39,998	\$0	\$0	\$39,998
19. Admin Non-Personnel	\$4	\$0	\$0	\$4
TOTAL ADMINISTRATIVE	\$40,002	\$0	\$0	\$40,002
<b>TOTAL AMOUNT OF FUNDS</b>	\$40,003	\$1	\$1	\$40,005

## 1. Lawyers

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
test	1.00	1.00	3.00	5.00
test	1.00	3.00	2.00	6.00
test	3.00	3.00	3.00	9.00
TOTAL LAWYERS	5.00	7.00	8.00	20.00

## 2. Paralegals

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
TOTAL PARALEGALS	0.00	0.00	0.00	0.00

## 3. Other Staff

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00



TOTAL OTHER STAFF	0.00	0.00	0.00	0.00
<b>TOTAL PERSONNEL (in FTEs)</b>	5.00	7.00	8.00	20.00

## Form D - Budget Narrative

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## Personnel

Account Title	Proposed Partnership Grant	Narrative
1. Lawyers	1	test
2. Paralegals	0	test
3. Other Staff	0	
<b>SUBTOTAL</b>	<b>1</b>	
4. Employee Benefits	0	
<b>TOTAL PERSONNEL</b>	<b>1</b>	

## Non-Personnel

Account Title	Proposed Partnership Grant	Narrative
5. Space	0	
6. Equipment Rental and Maintenance	0	test
7. Office Supplies	0	
8. Printing and Postage	0	
9. Telecommunications	0	
10. Technology	0	
11. Program Travel	0	
12. Training	0	
13. Library	0	
14. Insurance	0	
15. Evaluation	0	
16. Contract Service to Clients	0	
17. Other	0	
<b>TOTAL NON-PERSONNEL</b>	<b>0</b>	
<b>Administrative</b>		
18. Personnel	39998	test
19. Non-Personnel	4	
<b>TOTAL ADMINISTRATIVE</b>	<b>40002</b>	
<b>TOTAL AMOUNT OF FUNDS</b>	<b>40003</b>	

## Form E - Project Assurances



Please download the Assurances document and upload a signed copy below. Please upload PDF files only.

Upload Signed  
Assurances Document:

Sample\_PDF\_for\_Testing.pdf

2.8 KB - 02/05/2020 3:59pm

Total Files: 1

## Form F - Agreement of the Partner Court

Any uploaded Letter(s) of Support and MOU are listed below and also attached at the end of this pdf.

1. Upload Letter(s) of  
Support:

Sample\_PDF\_for\_Testing.pdf

2.8 KB - 02/05/2020 3:59pm

Total Files: 1

2. Upload MOU(s):

Refer to application  
instructions for MOU  
requirements.

### Supporting Documents (Optional)

When naming optional supporting documents, please include the Organization's acronym (or short name) and a 1-5 word description of the file.



## Staff Review

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**Project Budget:** No Revision Required

**All Services at  
Courthouse:**

**Application Review No  
Complete:**

Sample PDF for Testing

Sample PDF for Testing



## Instructions for Completing the Request for Proposals for Partnership Grants

Partnership Grant proposals must be submitted on SmartSimple. For information about the Request For Proposal, including eligibility, requirements, and selection criteria, refer to the Partnership Grant RFP Requirements, Priorities and Policies document found on the SmartSimple home page.

### Overview

A completed proposal will include the following components:

- Form A – Project Profile
- Form B – Project Description
- Form C – Project Budget
- Form D – Budget Narrative
- Form E – Project Assurances
- Form F – Agreement of the Partner Court

All responses should be self-contained and should only refer to materials uploaded to the proposal.

### General Information

- Click the check-boxes to confirm that the information on the applicant’s organization profile is accurate and up-to-date, and that the applicant is familiar with the grant requirements.
- If the applicant has not already done so, click on Requirements, Priorities and Policies to review the funding criteria and priorities for Partnership Grants.
- **Project Title:**
  - **Currently-funded Projects:** Do not provide a project title at this time. The title will be identified at Form A, item 5.b.
  - **Projects seeking first-time Partnership Grant Funding:** Provide a title for this project that references the county or court branch, and the substantive legal area or intended constituency – e.g., “Del Norte Unlawful Detainer Clinic” or “Martinez Courthouse Seniors Clinic”.

### Form A - Project Profile

Respond to questions, providing basic information on the proposed project.

Item 3 – Total Amount Requested: Partnership Grants will be funded in amounts evenly divisible by 1000. If a grant amount is input here that does not end with three zeroes, this cell will round the figure up or down to the nearest thousand.

## Partnership Grant RFP Instructions

## Page 2

Item 4 - Clinic Location and Hours: Identify the Partner Court, location of services (if different), address, schedule of days and hours of operation, and the total onsite hours of service per month. Use the gold “+” button to add a row for each host court; use the gold “X” button to delete a row.

Item 5: Identify whether the project is currently in operation.

- Item 5a – Current Project Summary: If the answer to Item 5 is “yes”, provide a brief summary of any relevant highlights, benchmarks, challenges, etc. from the prior year’s operations, including any changes made over the prior year or anticipated for the coming year. Item 5b; Indicate whether the project is currently funded by a Partnership Grant.
  - An existing project would be considered “new” or not currently funded if it changes locations or significantly changes its substantive focus.
  - **If the answer to 5b is “yes”**, select the project title from drop-down menu.
  - **If the answer to 5b is “no”**, ensure that a title for this project has been provided on the General Information tab. Project titles should reference both the jurisdiction or court branch where services will be provided, and the legal area or constituency to be served.

Item 6 – Project Abstract: Provide a brief abstract of the proposed project generally describing the legal area to be addressed; the target constituency; the type(s) of services to be provided; the location and hours of operation for this project; project staffing; general nature of court participation; and main goals. This abstract will be submitted in summaries provided to the Legal Services Trust Fund Commission and the Judicial Council, and is incorporated into the Court’s Letter of Support template that is included as part of this application at Form F.

Item 7 – Substantive Areas: Identify all substantive areas to be addressed by this project.

### **Form B - Project Description**

Respond to questions to provide a detailed description of the proposed project.

Item 1 - Program’s Qualifications: Describe the applicant program’s experience providing assistance to self-represented litigants, including court-based services.

Item 2 - Needs Assessment: Describe the demographics of the target community, the geographic area to be served by the project, and why the target population is in particular need of the services to be provided.

Item 3 - Types of Services to be Provided: Describe the legal issues to be addressed and the type and level of services to be offered by the project.

Item 4 – Goals and Objectives: Click the “Open” button to input data to the chart, indicating the number of anticipated services or activities for each category. Input 0 when no such services are anticipated; do not leave blank cells.

## Partnership Grant RFP Instructions

## Page 3

- Item 4a – Workshop Format: Describe the format for any workshops, including any use of video conference or electronic document assembly, and the goal for each type of workshop. (250 word limit)
- Item 4b – New Resource Materials: Identify any new resource materials to be developed, who will be responsible for preparing those materials, and how they differ from materials already posted, i.e., at <https://www.srln.org/node/524/toolkit-tools-evaluation-court-based-self-help-centers-california-cfcc-2015><https://www.srln.org/node/524/toolkit-tools-evaluation-court-based-self-help-centers-california-cfcc-2015>.

Item 5 – Community Engagement:

- Item 5a- Outreach: Describe how this project will communicate the availability of services to litigants and the community.
- Item 5b - Language Access: Describe language capabilities among staff, including resources for translation services if necessary for serving the target population.
- Item 5c - Coordination: Describe any current and planned coordination and collaboration on this project with existing court-based services, other legal services providers, or other community organizations.

Item 6 – Quality Control:

- Item 6a - Staffing Structure: Identify key personnel involved in staffing and supervising this project. If supervision is not being provided on-site, describe the steps that will be taken to ensure quality control.
- Item 6b - Supervision of Volunteers: Identify any volunteers to be utilized, their anticipated role, and how they will be trained and supervised.
- Item 6c - Pro Se Document Review: Describe how the project will ensure that documents are completed correctly; identify who will conduct the review and when review will be conducted.
- Item 6d - Sub-Grants: Provide details for any sub-grant(s), including plans for oversight and evaluation of the services provided by the sub-grantee.

## Partnership Grant RFP Instructions

## Page 4

## Item 7: Eligibility For Services

- Item 7a – Criteria, Guidelines, Screening: Identify all criteria and guidelines used to establish eligibility for services, and how the project will screen for eligibility for services.
- Item 7b – Alternate Resources or Referrals: Identify any resources or referrals to be provided to litigants who are not eligible for this project's services.
- Item 7c – Funding Reserved for Assisting Indigent Litigants: Describe how the organization will ensure that Partnership Grant funds are only used to provide services to indigent individuals as defined at Business & Professions Code Section 6213(d).

Item 8 - Attorney-Client Relationship: Indicate whether an attorney-client relationship will be formed with litigants receiving services through this project.

- Item 8a: Additional details about the relationship with litigants
  - **If the answer to Item 8 is “yes”**, describe how project staff will check for client conflicts, and how individuals will be served if a conflict is identified, i.e., referrals to a conflict panel, independent contractor, etc.
  - **If the answer to Item 8 is “no”**, explain how litigants will be made aware of the scope of services to be provided and that no attorney-client relationship will be established.

Item 9 - Impartiality of the Court: Indicate whether this project serve only one party or side of a matter (for example, only respondents, only defendants, etc.)

- Item 9a: Additional information about projects that only serve one side or party: If the answer to Item 9 is “yes”, identify which side will be served, and why the project has established this limitation. Describe the social implications of this decision, and indicate how this project will address any risk to the appearance of the court's impartiality as a result of limiting services to one side in these matters.

Item 10: Partnership with the Host Court.

Please note: A formal letter of support signed by the Presiding Judge, and a Memorandum of Understanding with the host court, must be uploaded to Form F; see below for detailed information about these documents.

- Item 10a - Facilities; Access; In-Kind Support: Identify all space and material resources being provided by the court, and any special access to facilities or data to be provided to the project or its staff.
- Item 10b - Regular Meetings: Project staff should meet no less than quarterly with key court partners. Identify the schedule for these meetings, who is expected to participate, and any issues currently to be resolved.

## Partnership Grant RFP Instructions

## Page 5

- Item 10c - Evaluation Support: The court is considered to be an equal partner in ensuring that the funded services are meaningfully evaluated. Identify the court's role in evaluating this project.

Item 11: New Project Implementation Timetable: Projects that are not currently in operation, or that propose significant changes to existing operations, must describe the proposed timetable for implementation of the project or revisions by quarter for the grant year.

Item 12 – Evaluation: Projects must submit detailed reporting and evaluation materials after each grant year. These will include an expenditures report, information on the demographics of clinic customers, findings from client satisfaction surveys, a report on meetings with court partners, and at least one additional evaluation modality.

- Use the gold “upload” button to upload a copy of the Satisfaction Survey now in use, or a proposed survey to be implemented in the coming grant year.
- Item 12a: Describe how satisfaction surveys will be distributed, and how data will be gathered and analyzed.
- Item 12b: Identify at least one additional evaluation methodology to be used in assessing the impact or efficacy of this project's services. Some options include focus groups, court file reviews or courtroom observations, or time or efficiency studies. Sample materials and resources for evaluation of court-based self-help centers can be found on the Judicial Council’s website: <https://www.srln.org/node/524/toolkit-tools-evaluation-court-based-self-help-centers-california-cfcc-2015>.

Item 13 – Project Continuity: Partnership Grant funding is prioritized for new and rural projects; funding is typically terminated after no more than five consecutive years.

- Item 13a – Plans for Sustaining Funding: Describe plans to obtain funding that will sustain this project's services beyond the typical Partnership Grant funding cycle.
- Item 13b – Fund Development Efforts: List all funding sources that have been explored or pursued for this Partnership Grant project in the last twelve months. Specifically identify applications submitted, amounts requested, revenue raised for project operations, and any funds that were obtained by leveraging the Partnership Grant. This section may also be used to explain any barriers to pursuing funds.

### **Form C - Project Budget; Form D – Project Budget Narrative**

- Partnership Grants will be funded in amounts evenly divisible by 1000; this Form C must reconcile with the grant amount requested at Form A item 3.
- The entire budget must be specific to the proposed project’s activities. The budget should include the entire project and should identify all the funding sources that will support it,

## Partnership Grant RFP Instructions

## Page 6

including the proposed Partnership Grant, as well as any other State Bar or non-State Bar monies committed to the project.

- Click the gold “Open” button to open the Project Budget Worksheet. Use this worksheet to identify all funds allocated to this project, from all funding sources. The chart has three sections: Program Personnel, Program Non-Personnel, and Administrative & Overhead. These categories are more fully described below.
- The description of project staff at Form B, the amounts budgeted for staff wages at Form C, and the narrative description of the personnel budget lines at Form D, should tell a consistent story.
- At the bottom of Form C, provide the requested information about the proposed staffing for the project, including the total full-time equivalent staffing (FTE) for each category of staff assigned to the project, by funding source (Partnership Grant, other State Bar monies, non-State Bar monies). Identify staff by their role within the project, rather than by name.
- Form D Narrative:
  - Click the gold “Open” button to open the Budget Narrative Worksheet. This chart pertains only to the proposed Partnership Grant funding identified on Form C; for each line item, use the “Narrative” column to indicate the purpose for the expenditure and the basis for calculating the allocation.
    - Explain any expenses under Contract Services to Clients (row 16) and Non-Personnel/Other (row 17), in the fields provided beneath the chart.
    - For any administrative allocations, identify the costs included in the allocation, and how the Partnership Grant’s share of those costs was calculated.
    - Any volunteers or contributed staffing should be identified above at Form B, part 6b.
    - Any significant in-kind support from the Court, such as use of facilities or equipment, should be identified above at Form B, Part 10a.

Expenses that may be allocated to the Partnership Grant budget are as follows:

#### PROGRAM EXPENSES

Program expenses are those expenses arising directly from the operation of the project.

Program Personnel: Funded program staff must be providing, or directly supervising, project services.

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

## Partnership Grant RFP Instructions

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

3. Other Staff: Salaries and wages paid to all other staff providing services through this project, whether full-time, part-time, or temporary.

4. Employee Benefits: Fringe benefits and payroll taxes paid on behalf of employees, such as retirement, FICA, health and life insurance, workers' compensation, unemployment insurance, and other payroll-related costs, for staff providing services to litigants through this project.

Program Non-Personnel Expenses: Non-personnel costs incurred directly through operation of the project may be included based on anticipated actual costs.

5. Space: Funds should only be allocated for "Space" costs to the extent that project-related work will be performed at the applicant's offices rather than at a court-based or other off-site location.

6. Equipment, Rental and Maintenance: Lease or rental expenses for equipment (except telephone) to be used by the proposed project; a commensurate share of anticipated maintenance costs for that equipment.

7. Office Supplies: Basic office supplies, including materials used in copiers and other small equipment. Equipment purchases under \$1,000 that enable services funded by the Partnership Grant may be included here.

8. Printing and Postage: Outside printing and postage.

9. Telecommunications: Local, long-distance, or cellular telephone service expenses incurred directly by the proposed project. Similar and related expenses for conference calls, videoconferencing or other telecommunication services should be included as well.

10. Technology: Expenses related to software purchases, subscriptions, and updates; computer hardware costing less than \$1,000 may also be listed here.

11. Program Travel: Travel expenses incurred by staff or volunteers to provide services through the proposed project.

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

13. Library: Expenses for the maintenance and expansion of office libraries required by the proposed project, including subscriptions to periodicals, books and update services.

## Partnership Grant RFP Instructions

## Page 8

14. Insurance: A share of professional liability insurance and bonding costs proportionate to staff who provide services through the proposed project.

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

16. Contract Service to Clients: Payments to private attorneys, consultants or organizations to provide professional services to litigants through the proposed project. Itemize individual contracts on Form D, including the identity of the contractors, the general nature of duties to be performed, and the rate of compensation or the contract amount.

17. Other Non-Personnel Program Expenses: Expenses not included above, arising directly as a result of the operation of the project. Itemize individual expenses comprising this item on Form D.

**ADMINISTRATIVE AND OVERHEAD**

Allocations to support the administration and overhead expenses of the project should be included under the “Administrative and Overhead” section of Forms C and D.

- Administration and overhead can include both personnel and non-personnel expenses associated with the organization’s management and support of the project, apart from the direct provision or supervision of services.
- Any administrative or overhead allocation should be explained on Form D. Identify the expenses included, and how the Partnership Grant’s share of those expenses was calculated.
  - The methodology for these calculations must be reasonable and appropriate for the expenditure, the project, and the organization as a whole, and should be calculated in a manner consistent with cost allocations for other projects operated by the organization.
  - Examples of appropriate allocation methodologies include ratios based on the project’s share of the organization’s total FTEs, attorney FTEs, or total operations budget.

18. Administrative Personnel Expenses: Salaries, wages, and benefits for personnel working on administration of the project.

19. Administrative Non-Personnel Expenses: A reasonable share of organizational non-personnel expenses such as payroll administration or audit expenses may be allocated to the project, commensurate with the size of the project and as appropriate to the project’s role within the organization.

**Form E: Project Assurances**

Download the Project Assurances document; obtain the signatures of the Executive Director and the Board President or another authorized board representative; scan the signed document and save it as a PDF file; and then upload the signed document where indicated on this form. Only PDF files may be uploaded.

### Form F: Agreement of the Partner Court

For each partner court, upload a Letter of Support and a Memorandum of Understanding.

\* Letter(s) of Support:

- A separate letter, signed by the Presiding Judge, must be provided with each application, for each county in which the project will operate.
- How to generate the letter of support:
  - Identify the Presiding Judge:
    - Select the appropriate Presiding Judge from the “Add Contacts” drop-down menu.
    - To add a new Presiding Judge to the list:
      - Select the “New Contact” option at the top of the drop-down list, and indicate the person’s role as “Presiding Judge.”
      - Click the “Add to Application” button to bring up a dialogue box for inputting contact information for the Presiding Judge. Click “Submit” at the bottom of this dialogue box to save the data. The selected Presiding Judge’s name should now appear on the Form.
  - Click “Create Template” to bring up a dialogue box to provide the following information:
    - Select a “Form F Template Name” that references the title of the project.
    - Indicate the status of the project MOU by clicking the appropriate radio button. (See below for more details about MOUs.)
    - Add any necessary additional comments.
    - Select the Presiding Judge’s name from the “Select Presiding Judge” drop-down on the template.
  - Review the letter for accuracy; click Save & Finish Later; then click “Download Letter” to produce a hard copy of the Letter of Support for the Presiding Judge’s signature.
  - Once the letter has been signed, scan it as a PDF and upload it to the proposal again by using the “Upload Letter(s) of Support” button. Only PDFs can be uploaded.
- Memorandum(a) of Understanding (MOU):

The applicant must enter into a formal agreement with each host court setting forth the duties and responsibilities of each party relative to the proposed project.

- This MOU should include the Project Title, the identity of the host court and the participating QLSP, the parties’ respective duties and obligations, details about the contract contact for each party, the date on which the agreement begins and terminates (or the conditions for terminating the agreement), any financial and/or in-kind support to be provided by either party, and any other logistical or administrative matters reflected in the proposal.

## Partnership Grant RFP Instructions

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- Lease or Use-of-Space agreements, agreements that do not cover the entire grant period, and unsigned agreements will not fulfill this MOU requirement.
- When uploading the MOU, provide a name for it that identifies the project, the county or region served, and the applicable grant period – for example, the 2020 Yuba County Small Claims Project MOU, or the Del Norte Fines and Fees Project Continuing Agreement .
- Projects in operation under a continuing MOU must still upload that MOU to the new proposal.

**Additional Documents**

Grants will not be funded until all required documentation has been submitted and approved, including the Court Letter of Support and Memorandum of Understanding identified at Form F. Programs offered a different grant amount than had been requested, must also complete a Revised Budget; after all documents have been approved and an award has been confirmed, grantees must execute a grant agreement with the State Bar before funding can be disbursed.




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

This document provides information for organizations interested in submitting proposals for Partnership Grants.

- Section A includes background on applicant eligibility requirements.
- Section B describes the criteria used to select successful Partnership Grant proposals.
- Section C states policies regarding whether, or to what extent, certain activities would be eligible for funding through a Partnership Grant.

Organizations intending to submit proposals for Partnership Grants should review these materials to ensure that the proposed projects are eligible for this funding, and that their proposals describe those activities in a manner that best addresses the principal concerns of the funding authorities.

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### **BACKGROUND**

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

Partnership Grants are awarded through a competitive process: The Commission reviews proposals and makes funding recommendations to the Judicial Council. Grants are awarded for a one-year period commencing January 1. Decisions of the Commission, as approved by the Judicial Council, are final; there is no appeals process.

Partnership Grants are primarily intended to support new projects or services, and to sustain services in rural or isolated areas. Consideration will also be given to ensuring that this funding

supports projects serving a diverse range of geographic areas, substantive issues, and client constituencies.

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

### **A. Applicant Eligibility Requirements**

Applicants for Partnership Grants must meet the following eligibility requirements:

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

### **B. Selection Criteria for Partnership Grants**

Partnership Grants are competitive and discretionary. The Commission will recommend grant awards with consideration for the need within the communities to be served, and the extent to which the proposals address the following issues:

- Impact of Services: The project must address the needs of the targeted population and achieve meaningful and timely outcomes.
- Collaboration with Cooperating Court: The project must be jointly undertaken with the court. The Commission will consider the extent to which the applicant and cooperating court will collaborate on this project to achieve access for self-represented litigants.

- **Integration with Court-Based Services:** The applicant's services, or planned services, should be integrated with other court-based services, including the Family Law Facilitator, self-help centers, and other offices of the cooperating court.
- **Court's Impartiality:** The proposal must ensure the court's independence and impartiality. If the project's services are to be reserved for only one litigant role, such as petitioners but not respondents, or defendants but not plaintiffs, the applicant must demonstrate that it has thoroughly explored all the implications of this decision with the court, and identified alternate legal resources that can provide meaningful if not equivalent levels of assistance to the opposing parties.
- **Conflict of Interest:** If the project establishes an attorney-client relationship with the self-represented litigants, it must provide meaningful referrals for individuals who are not eligible to use the services because they present a conflict of interest for the project.
- **Information and Referrals:** The proposal must address the methods by which the project will provide information and alternatives to litigants who are not eligible to use its services for any reason.
- **Continuity Planning:** In anticipation of the eventual termination of Partnership Grant support, the applicant must diligently pursue other means for supporting the continuation of the project. The Commission will consider efforts to pursue other sources of funding and support, as well as contributions actually received, such as commitments of the program's general operating revenue, recruitment of volunteers, and in-kind support.
- **Evaluation:** All applicants must incorporate evaluation plans into their Partnership Grant proposal and complete a year-end evaluation report.

### **C. Policies Regarding Administration Of Partnership Grants**

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

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

Self-represented litigants receiving services under a Partnership Grant are not prohibited from forming a confidential relationship with a lawyer, so long as they remain unrepresented when they appear in court. While we will ultimately defer to the court's own determination as to

whether the litigant is self-represented, factors impacting this determination include where any attorney's participation takes place, and whether the attorney's name appears on pleadings or in the records of proceedings in court. So long as no appearance is made on the record and no representational activity occurs in court, formation of an attorney-client relationship in and of itself is not inconsistent with the "self-represented" status of a litigant.

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

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

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

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

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

- The contract governing the relationship between the grant recipient organization and the court must clearly specify that grant-funded court staff will only work on project activities, not on other duties that might be assigned by the court.
- The contracted staff must follow the Guidelines for the Operation of Self-Help Centers, with particular regard to ensuring the court's neutrality as to the fact that services are being provided, the manner in which they are provided, and the persons to whom they are provided.
- The services funded would not otherwise be provided by the court, but for the Partnership Grant. The Partnership Grant shall not supplant existing funding or services.
- The project budget must include additional funding sufficient to assist litigants who do not qualify to be served with Partnership Grant funding.

- In these and all cases, the court must participate in providing feedback and in developing evaluative data. Where funding is sub-granted to the court partner for payment of court staff, this evaluative data will include information on the number of litigants using the service who do not meet the definition of “indigent” found at Business & Professions Code §6213.

**Prioritization of Funding for New Projects and to Sustain Services in Rural Areas (July 2019)**

Partnership Grant funding is prioritized first to support new projects, and to sustain projects serving rural areas. Other projects seeking funding beyond a 5th year will be considered for funding only after proposed awards have been identified first for all prioritized projects, and then for any proposals seeking funding for a second through fifth year. The State Bar retains discretion to waive this policy and consider proposals for funding in excess of five years under certain exceptions together with proposals seeking funding of less than six years.

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

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

PROGRAM	PROJECT	COUNTY	FUNDING HISTORY		
			GRANT YEAR	AMOUNT REQUESTED	GRANT AWARDED
Bay Area Legal Aid	Alameda County Consumer Rights Clinic	Alameda	2021	\$74,000	
Bet Tzedek Legal Services	Self-Help Elder and Dependent Adult Restraining Order Clinic	Los Angeles	2017	\$80,000	\$80,000
			2018	\$80,000	\$80,000
			2019	\$80,000	\$80,000
			2020	\$80,000	\$80,000
			2021	\$80,000	
Central California Legal Services	Guardianship Project	Fresno	2016	\$57,320	\$25,000
			2017	\$50,000	\$50,000
			2018	\$59,851	\$60,000
			2019	\$80,000	\$70,000
			2020	\$70,533	\$70,000
			2021	\$73,000	
Central California Legal Services	Tenant/Landlord Housing Law Project	Fresno	2015	\$114,238	\$75,000
			2016	\$74,825	\$50,000
			2017	\$62,000	\$41,000
			2018	\$75,000	\$75,000
			2019	\$70,000	\$70,000
			2020	\$71,042	\$71,000
			2021	\$71,000	
Central California Legal Services	Tulare County Unlawful Detainer Workshop	Tulare	2020	\$69,443	\$70,000
			2021	\$70,000	
Community Legal Aid - SoCal	Orange County Community Court Clinic	Orange	2020	\$29,379	\$29,000
Community Legal Aid - SoCal	Orange County Consumer Debt Workshop	Orange	2019	\$47,260	\$47,000
			2020	\$47,988	\$48,000
			2021	\$43,000	
Community Legal Aid - SoCal	Unlawful Detainer Workshop at Norwalk	Los Angeles	2018	\$66,356	\$66,000
			2019	\$60,789	\$60,000
			2020	\$59,271	\$59,000
			2021	\$70,000	
Elder Law & Advocacy	Imperial County Unlawful Detainer/Elder Abuse Restraining Order Self-Help Clinic	Imperial	2016	\$80,000	\$65,000
			2017	\$65,000	\$65,000
			2018	\$68,800	\$68,000
			2019	\$69,000	\$68,000
			2020	\$68,000	\$68,000
			2021	\$71,000	
Family Violence Law Center	Domestic Violence Pro Per Project	Alameda	2016	\$25,000	\$25,000
			2017	\$25,000	\$25,000
			2018	\$25,000	\$25,000
			2019	\$25,000	\$23,000
			2020	\$25,000	\$25,000
			2021	\$25,000	

PROGRAM	PROJECT	COUNTY	FUNDING HISTORY		
			GRANT YEAR	AMOUNT REQUESTED	GRANT AWARDED
Housing and Economic Rights Advocates	Probate Clinic	San Mateo	2021	\$42,000	
Inland Counties Legal Services	Consumer Clinic Partnership	San Bernardino	2021	\$294,000	
Justice & Diversity Center of The Bar Association of San Francisco	FLASH-CARE	San Francisco	2016 2017 2018 2019 2020 2021	\$65,000 \$63,450 \$65,000 \$66,057 \$60,000 \$60,000	\$20,000 \$63,000 \$65,000 \$50,000 \$50,000
Justice & Diversity Center of The Bar Association of San Francisco	Shriver-SASH Self-Help	San Francisco	2018 2019 2020 2021	\$108,959 \$105,708 \$110,000 \$74,000	\$103,000 \$80,000 \$70,000
LACBA Counsel for Justice	Domestic Violence Legal Services Project	Los Angeles	2019 2020 2021	\$90,370 \$91,196 \$97,000	\$90,000 \$91,000
Legal Access Alameda	Alameda County Family Law Day of Court Project	Alameda	2016 2017 2018 2019 2020 2021	\$80,395 \$65,293 \$65,000 \$65,000 \$30,000 \$30,000	\$60,000 \$65,293 \$64,231 \$30,000 \$30,000
Legal Access Alameda	Family Law Status Conference Project	Alameda	2019 2020 2021	\$65,000 \$65,000 \$65,000	\$65,000 \$65,000
Legal Aid Foundation of Los Angeles	Torrance Self-Help Center	Los Angeles	2020 2021	\$100,000 \$100,000	\$100,000
Legal Aid Foundation of Santa Barbara County	Legal Resource Center Partnership	Santa Barbara	2020 2021	\$114,587 \$126,000	\$110,000
Legal Aid of Marin	Community Court Expansion	Marin	2019 2020 2021	\$80,000 \$80,000 \$80,000	\$80,000 \$80,000
Legal Aid Society of San Bernardino	Caregivers Accessing Justice	San Bernardino	2018 2019 2020 2021	\$124,928 \$124,825 \$85,000 \$100,000	\$82,000 \$85,000 \$85,000
Legal Aid Society of San Diego	Name Change & Gender Marker Change Self-Help Clinic	San Diego	2019 2020 2021	\$120,000 \$85,000 \$85,000	\$85,000 \$85,000

PROGRAM	PROJECT	COUNTY	FUNDING HISTORY		
			GRANT YEAR	AMOUNT REQUESTED	GRANT AWARDED
Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion (Shriver)	San Diego	2018	\$120,000	\$103,000
			2019	\$120,000	\$100,000
			2020	\$100,000	\$80,000
			2021	\$80,000	
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	Alameda	2017	\$65,789	\$65,000
			2018	\$65,375	\$65,000
			2019	\$65,000	\$65,000
			2020	\$65,000	\$50,000
			2021	\$65,000	
Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	Alameda	2020	\$98,041	\$60,000
			2021	\$65,000	
Legal Services of Northern California	Small Claims and Guardianship Self-Help Project	Yolo	2019	\$82,000	\$82,000
			2020	\$85,000	\$85,000
			2021	\$62,000	
Legal Services of Northern California - Mother Lode	Mother Lode Pro Per Project	Amador, Calaveras, El Dorado, Placer, Nevada, Sierra	2012	\$48,000	\$50,000
			2013	\$58,000	\$58,000
			2014	\$58,000	\$58,000
			2015	\$58,000	\$55,000
			2016	\$55,000	\$50,000
			2017	\$60,000	\$60,000
			2018	\$60,000	\$60,000
			2019	\$85,000	\$85,000
			2020	\$85,000	\$98,000
			2021	\$95,000	
Neighborhood Legal Services	Consumer Technology Project	Los Angeles	2021	\$126,000	
Neighborhood Legal Services	Housing Cases Continuum of Services	Los Angeles	2021	\$113,000	
Neighborhood Legal Services	Stabilizing Families	Los Angeles	2021	\$113,000	

PROGRAM	PROJECT	COUNTY	FUNDING HISTORY		
			GRANT YEAR	AMOUNT REQUESTED	GRANT AWARDED
Public Counsel	Guardianship Clinic	Los Angeles	2014	\$76,339	\$60,000
			2015	\$60,000	\$60,000
			2016	\$60,000	\$55,000
			2017	\$60,000	\$60,000
			2018	\$60,000	\$60,000
			2019	\$60,000	\$45,000
			2020	\$60,000	\$30,000
			2021	\$60,000	
Public Law Center	De Facto & Adoptive Parent Assistance Project	Orange	2020	\$50,000	\$50,000
			2021	\$50,000	
Public Law Center	Orange County Courthouse Guardianship Clinic	Orange	2018	\$60,000	\$60,000
			2019	\$60,000	\$60,000
			2020	\$60,000	\$30,000
			2021	\$60,000	
Riverside Legal Aid	Small Estates Assistance Program	Riverside	2016	\$37,712	\$37,000
			2017	\$59,211	\$59,000
			2018	\$68,000	\$68,000
			2019	\$103,177	\$90,000
			2020	\$105,005	\$105,000
			2021	\$105,000	
San Diego Volunteer Lawyer Program, Inc.	Central Division Restraining Order Clinic	San Diego	2019	\$100,000	\$100,000
			2020	\$100,000	\$100,000
			2021	\$130,000	
San Luis Obispo Legal Aid Foundation	Sal Luis Obispo County Rental Clinic	San Luis Obispo	2021	\$100,000	