



THE STATE BAR OF CALIFORNIA

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DATE: August 10, 2018

TO: Members of the Legal Services Trust Fund Commission

FROM: Doan Nguyen, Program Supervisor

SUBJECT: Determining Eligibility of Applicants for 2019 Grants

This is a report of the work of the Eligibility Committee on grant applications for 2019 funding. This report describes the review process and summarizes applications received for 2019 IOLTA and EAF grants. The Committee met in person on July 13 and 27, and select Committee members are participating in Eligibility Conferences on August 13. The Committee will meet again before the full Commission meeting on August 17 to hear reports on any pending issues that were raised at their initial meetings.

We received 100 applications for funding in the 2019 grant year, including four new applicants. One of those applicants has since withdrawn.

REVIEW PROCESS

Applications were first reviewed by staff for completeness and for compliance with eligibility requirements established by statute and further interpreted by rules adopted by the State Bar. Eligibility guidelines adopted by the commission restate the requirements of the statute and rules, and offer commentary on factors to be considered in deciding whether an applicant complies with the requirements.

Review of applications by staff, committee and commission members is limited to an assessment of whether each applicant (1) has demonstrated compliance with the statutory requirements, (2) has signed assurances that grant funds will be properly expended, and (3) has provided the financial data that is necessary for the accurate calculation of grant allocations.

Staff reviewed a number of specific applications with the Eligibility Committee at its meeting on July 13 and 27 and identified various issues of concern. Following discussion, the Committee invited two programs to participate in individual Eligibility Review Conferences to provide additional information for Committee consideration. A report regarding these meetings and eligibility recommendations will be made at the August 17 Commission meeting.

August 10, 2018