



Legal Services Trust Fund Commission 2021 Work Plan*

Charge:

The Legal Services Trust Fund Commission (LSTFC) is composed of 24 members (21 voting and three nonvoting judicial members) appointed by the Board of Trustees and Judicial Council of California. The charge of the LSTFC is as follows:

- Administer, in accordance with legal requirements and State Bar Rules, revenue from Interest on Lawyers' Trust Accounts (IOLTA) and other funds remitted to the Legal Services Trust Fund Program of the State Bar including the Equal Access Fund (EAF) from the Judicial Council pursuant to the California state budget.
- The LSTFC determines an applicant's eligibility for grants and notifies each grant applicant that its application has been approved or denied.
- The LSTFC monitors and evaluates a recipient's compliance with Trust Fund Requirements and grant terms.
- The LSTFC also reviews denial or termination of funding and complaints from any person or entity when a grant recipient fails to meet Trust Fund Requirements. (Rules of the State Bar, Title 3, Division 5, Chapter 2, Rule 3.661)
- The LSTFC recommends to the Board of Trustees the annual IOLTA distribution and the distribution plan for any grant funding, including discretionary grants.

* Please note: Due to the current COVID-19 health crisis, implementation of this Work Plan may require flexibility to address pressing needs as they arise. However, all core business and compliance objectives will be timely met.

| STRATEGIC PLAN GOAL & OBJECTIVE | WORK PLAN | DEADLINE | TO BOARD COMMITTEE (Y/N) / DATE |
|---|--|---|---------------------------------|
| None – Core Business | <ul style="list-style-type: none"> Review and approve 2022 IOLTA and EAF Grant awards Review and approve IOLTA and EAF Grant carryover and budget modification requests | <ul style="list-style-type: none"> 11/12/21 11/12/21 | No |
| None – Core Business | <ul style="list-style-type: none"> Review and approve 2022 Partnership Grant awards Review and approve Partnership Grant carryover and budget modification requests | <ul style="list-style-type: none"> 08/13/21 11/12/21 | No |
| None – Core Business | <ul style="list-style-type: none"> Review and approve potential redistribution of unspent Homelessness Prevention Grants Review and approve Homelessness Prevention Grant carryover and budget modification requests | <ul style="list-style-type: none"> 08/14/21 11/12/21 | No |
| None – Core Business | <ul style="list-style-type: none"> Review and approve 2022 Bank Grant awards Review and approve Bank Grant carryover and budget modification requests | <ul style="list-style-type: none"> 11/12/21 11/12/21 | No |
| None – Core Business | <ul style="list-style-type: none"> Draft and approve RFP for the funding of provisionally licensed lawyers from the additional \$5 opt-in Review and approve provisional licensed lawyer awards | <ul style="list-style-type: none"> 3/31/21 6/30/21 | No |
| None – Compliance | <ul style="list-style-type: none"> Review cases in which a grantee’s funding may be terminated because of their failure to comply with relevant legal standards and authorities | Ongoing | No |
| None – Core Business | <ul style="list-style-type: none"> Recommend 2022 IOLTA distribution | <ul style="list-style-type: none"> 06/25/21 | Yes, 07/22/21 |
| Goal 1, objective c: No later than September 30, 2018, determine the appropriate role of, and Board responsibility for, State Bar | <ul style="list-style-type: none"> Gather, codify, and revise, as necessary and appropriate, all of the decision points and considerations that are used as part of the grant | <ul style="list-style-type: none"> Finalize recommendations for BOT by | Yes, Summer 2022 |

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| <p>Standing Committees, Special Committees, Board, and Commissions in the new State Bar.</p> <p>Goal 4, objective b: Study and implement improved programmatic approaches to increasing access to justice.</p> | <p>administration and determination processes and procedures</p> | <p>Summer 2022; codification process complete in 2022 (by the IOLTA/EAF application release date for 2024 funding)</p> | |
| <p>Goal 4, objective a: Support increased funding and enhanced outcome measures for Legal Services.</p> | <ul style="list-style-type: none"> • Aggregate and analyze Homelessness Prevention Grant evaluation data • Draft key findings and outcomes on Homelessness Prevention funds • Aggregate and analyze Bank Grant evaluation data • Draft key findings and outcomes on Bank Grant funds • Participate in Task Force on Justice Gap Funds • Participate in efforts to increase funding for legal aid grants | <ul style="list-style-type: none"> • 12/31/21 • 12/31/21 • 12/31/21 • 12/31/21 • 12/31/20 • Ongoing | <p>No</p> |
| <p>Goal 4, objective e: No later than December 31, 2019, complete a California Justice Gap Study. The Justice Gap Study will be modeled on the 2017 Legal Services Corporation Justice Gap Study but will also include an evaluation of the costs of legal education in California and the impact of those costs on access to justice, as well as possible approaches to addressing the costs of legal education including loan forgiveness programs or other means.</p> | <ul style="list-style-type: none"> • Provide recommendations based on California Justice Gap Study → COMPLETED • Provide input to the Justice Gap Phase II | <ul style="list-style-type: none"> • 06/26/20 | <p>No</p> |