

2020 Budget Revision and Carry-Over Requests**As prepared for the Eligibility & Budget Review Committee and Legal Services Trust Fund Commission Meetings**

No.	Organization Name	Date Submitted	Grant	2020 Grant Amount ¹	Budget Revision Total	Budget Revision %	Carry-Over Amount	Carry-Over %	Staff Recommendation or Action	Form D grantee explanations for material budget deviations and/or carry-over request
On-time Requests (25% or above)										
1	Asian Americans Advancing Justice - Los Angeles	11/2/2020	IOLTA	\$1,901,010	\$ 776,878	41%	\$ 1,191,668	63%	Defer to Commission	<p>Note from OA&I staff: Advancing Justice-LA submitted a timely request to revise their 2020 IOLTA and EAF budgets and to carry forward a portion of those funds. Staff missed this request, however, in assembling the batch that the Commission approved on November 13, 2020. This happened as grant portfolios changed hands in the fall. Staff apologize and ask the Commission to consider this on-time revision and carryover request at the Commission's February 26 meeting.</p> <p>The original budget was developed prior to the pandemic. With COVID-19 and consequent shelter-in-place orders, new expenses and priorities have arisen, e.g. equipment and technology to support remote services, and increased facilities/janitorial costs.</p> <p>We had to shift programmatic priorities due to COVID-19. In April-July, we received other, non-State Bar funding to implement COVID-19 rapid response programming, pivoting the majority of our staff to work on this project. Because the funding covered the bulk of our organizational expenses during that time period, fewer expenses were allocated to our other funding sources, including IOLTA/EAF. This resulted in an under-expenditure/carry-over of our 2020 funds. Additionally, we anticipate decreased revenue in 2021 and are prioritizing spending down restricted funds in 2020.</p>
2	Asian Americans Advancing Justice - Los Angeles	11/2/2020	EAF	\$804,460	\$ 276,523	34%	\$ 396,158	49%	Defer to Commission	<p>Note from OA&I staff: Advancing Justice-LA submitted a timely request to revise their 2020 IOLTA and EAF budgets and to carry forward a portion of those funds. Staff missed this request, however, in assembling the batch that the Commission approved on November 13, 2020. This happened as grant portfolios changed hands in the fall. Staff apologize and ask the Commission to consider this on-time revision and carryover request at the Commission's February 26 meeting.</p> <p>The original budget was developed prior to the pandemic. With COVID-19 and consequent shelter-in-place orders, new expenses and priorities have arisen, e.g. equipment and technology to support remote services, and increased facilities/janitorial costs.</p> <p>We had to shift programmatic priorities due to COVID-19. In April-July, we received other, non-State Bar funding to implement COVID-19 rapid response programming, pivoting the majority of our staff to work on this project. Because the funding covered the bulk of our organizational expenses during that time period, fewer expenses were allocated to our other funding sources, including IOLTA/EAF. This resulted in an under-expenditure/carry-over of our 2020 funds. Additionally, we anticipate decreased revenue in 2021 and are prioritizing spending down restricted funds in 2020.</p>
Requests Submitted After November 2nd (25% or above)										
3	California Rural Legal Assistance	2/12/2021	IOLTA	\$ 3,672,960	See below	See below	\$ 1,279,765	35%	Approve	<p>Note from OA&I staff: The requested carryover amount is nearly identical to a carryover previously approved by the Commission; this request seeks to re-allocate those funds from administrative costs to program personnel costs.</p> <p>CRLA's request to carryover \$1.28M in 2020 IOLTA funding was approved by the State Bar. CRLA now seeks approval for a change to the allocations within that approved carryover budget. In order to avoid workforce reductions in 2021, CRLA has modified its budget to move \$579,910 out of the Administrative Non-Personnel line item. These funds were originally allocated to reduce the loan on CRLA's headquarters in Oakland. We have instead allocated approximately \$259,000 toward attorney wages, \$86,000 toward community outreach worker/paralegal wages, \$51,000 toward other staff wages, and \$96,000 in associated payroll taxes and benefits within the Program Personnel cost center and \$86,850 has been allocated to the Administrative Personnel line item. These reallocations will allow us to provide greater continuity of assistance in our service areas by preserving our current workforce.</p>
4	Harriett Buhai Center for Family Law	1/28/2021	IOLTA	\$ 306,230	-	Under 10%	\$ 130,026	42%	Approve	The Harriett Center for Family Law has benefited from a PPP loan as well as some additional CARES ACT funding. In order to be able to maximize the other funding opportunities we were not able to full expend the State Bar IOLTA and EAF 2020 funds and kindly request that we be able to roll those funds over to the 2021 calendar year where we expect to have less funding from multiple sources.
5	Harriett Buhai Center for Family Law	1/28/2021	EAF	\$ 129,590	-	Under 10%	\$ 33,903	26%	Approve	The Harriett Center for Family Law has benefited from a PPP loan as well as some additional CARES ACT funding. In order to be able to maximize the other funding opportunities we were not able to full expend the State Bar IOLTA and EAF 2020 funds and kindly request that we be able to roll those funds over to the 2021 calendar year where we expect to have less funding from multiple sources.
6	Inland Empire Latino Lawyers Association	11/30/2020	IOLTA	\$ 166,770	-	Under 10%	\$ 80,476	48%	Approve	IELLA received a COVID-19 PPP loan. The PPP loan resulted in underspending of IOLTA and EAF payroll expenses during 2020.
7	Inland Empire Latino Lawyers Association	11/30/2020	EAF	\$ 70,580	-	Under 10%	\$ 45,034	64%	Defer to Commission	IELLA received a COVID-19 PPP loan. The PPP loan resulted in underspending of IOLTA and EAF payroll expenses during 2020.
8	Los Angeles Center for Law and Justice	12/2/2020	IOLTA	\$ 303,530	N/A	N/A	\$ 103,061	34%	Approve	The extraordinary circumstances of the COVID 19 pandemic caused all of LACLI to move to remote work. As we worked to reformat our programs and figure out solutions to enable client access to our services, many other items were put on hold. For example, we had a couple of staff members move on from their positions. Although typically we would have hired to fill those vacant spots immediately, with things in such flux, we chose not to. LA County was in lockdown and this had the immediate effect of slowing down referrals to our services. With this initial decrease, there was no immediate pressing need to fill those positions, as well. Meanwhile our staff members had to reallocate their time in order to help cover those vacancies. Although the need for our services had realistically not decreased, this initial choice was made to wait to hire as we, with the rest of the country, tried to figure out our best steps forward. Other items that we had budgeted for also were underutilized as the circumstances of the pandemic prevented travel, forced many trainings to move online (at a decreased price or for free), and put a hold on projects that we had intended to pursue with the funds (such as the modification of LACLI's case management system for EAF).

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9	National Health Law Program	12/21/2020	IOLTA	\$ 378,962	N/A	N/A	\$ 125,160	33%	Approve	As noted above, IOLTA has an overall project carryover of 33%. This percentage in carryover is mainly because we were advised by The State Bar of California to carry over as much funding as possible into 2021 to absorb the funding decrease during that year. The line items that have resulted in under-expenditure are as follows: Total personnel @ 31%; Space @24%; Equipment Rental & Maintenance @71%; Office Supplies @67%; Printing & Postage @80%; Insurance @46%, and administrative personnel @51%. We want to take this opportunity to additionally request a reallocation from Program Travel, initially budget at \$6,999, to the Library line item in the amount of \$2,999, and in the Other expense line item in the amount of \$4,000. That would allow NHeLP to cover more of the books/subs/reference, audit, dues, and membership costs it has already incurred during this year, and we foresee incurring in 2021. Due to COVID-19, the Program Travel line item was not spent, as travel during 2020 was restricted.
10	San Diego Volunteer Lawyer Program	2/3/2021	IOLTA	\$ 381,820	\$ 25,643	28%	See below	See below	Approve	In early March 2020, the SDVLP staff attorney who was located at the San Diego Family Justice Center (FJC) resigned. The plan was to hire a replacement, however, the pandemic and subsequent lockdown began. The FJC shut down almost completely, and we did not hire another attorney for that position. It is for this reason that we were unable to expend the funds.
Informational Purposes Only (Requests Below 25%)										
11	California Rural Legal Assistance	2/12/2021	IOLTA	\$3,672,960	\$ 602,195	16%	See above	See above	Approve	Note from OA&I staff: The requested carryover amount is nearly identical to a carryover previously approved by the Commission; this request seeks to re-allocate those funds from administrative costs to program personnel costs. CRLA's request to carryover \$1.28M in 2020 IOLTA funding was approved by the State Bar. CRLA now seeks approval for a change to the allocations within that approved carryover budget. In order to avoid workforce reductions in 2021, CRLA has modified its budget to move \$579,910 out of the Administrative Non-Personnel line item. These funds were originally allocated to reduce the loan on CRLA's headquarters in Oakland. We have instead allocated approximately \$259,000 toward attorney wages, \$86,000 toward community outreach worker/paralegal wages, \$51,000 toward other staff wages, and \$96,000 in associated payroll taxes and benefits within the Program Personnel cost center and \$86,850 has been allocated to the Administrative Personnel line item. These reallocations will allow us to provide greater continuity of assistance in our service areas by preserving our current workforce.
12	Coalition for California Welfare Rights Organizations	12/5/2020	IOLTA	\$ 378,962	\$ 21,838	17%	\$ 79,792	22%	Approve	Due to the COVID-19 coronavirus pandemic CCWRO underexpended its 2020 allocation as staff starting working out of their homes. A classic example is "travel". All travel was frozen and it continues in 2021. The \$5,000 training funding was not touched in 2020 due to the pandemic. In short, the carry-over funds will help us keep existing staff rather than laying off staff given the reduction of the 2021 IOLTA funding.
13	Coalition for California Welfare Rights Organizations	12/5/2020	EAF	\$ 160,367	\$ 10,575	15%	\$ 27,699	17%	Approve	Due to the COVID-19 coronavirus pandemic CCWRO underexpended its 2020 allocation as described in D. In 2021 CCWRO was hit with a 28% reduction in IOLTA funding – from \$539,329 down to \$391,492. This was major blow to CCWRO, and it would have resulted in laying off much pandemic needed staff. The carry-over funds plus anticipated attorney fees for 2021 saved the day. Given the carry over and anticipated attorney fees and input from our Board, it was decided to keep existing staff rather than laying off staff given the reduction of the 2021 IOLTA funding.
14	Legal Aid Foundation of Los Angeles	11/24/2020	IOLTA	\$ 2,129,290	N/A	N/A	\$ 452,972	21%	Approve	Due to infusion of PPP loan during COVID-19, IOLTA and EAF grants were under spent.
15	Legal Aid Foundation of Los Angeles	11/24/2020	EAF	\$ 901,060	N/A	N/A	\$ 213,913	24%	Approve	Due to infusion of PPP loan during COVID-19, IOLTA and EAF grants were under spent.
16	Los Angeles Center for Law and Justice	12/2/2020	EAF	\$ 128,440	N/A	N/A	\$ 25,874	20%	Approve	The extraordinary circumstances of the COVID 19 pandemic caused all of LACLJ to move to remote work. As we worked to reform our programs and figure out solutions to enable client access to our services, many other items were put on hold. For example, we had a couple of staff members move on from their positions. Although typically we would have hired to fill those vacant spots immediately, with things in such flux, we chose not to. LA County was in lockdown and this had the immediate effect of slowing down referrals to our services. With this initial decrease, there was no immediate pressing need to fill those positions, as well. Meanwhile our staff members had to reallocate their time in order to help cover those vacancies. Although the need for our services had realistically not decreased, this initial choice was made to wait to hire as we, with the rest of the country, tried to figure out our best steps forward. Other items that we had budgeted for also were underutilized as the circumstances of the pandemic prevented travel, forced many trainings to move online (at a decreased price or for free), and put a hold on projects that we had intended to pursue with the funds (such as the modification of LACLJ's case management system for EAF).
17	San Diego Volunteer Lawyer Program	2/3/2021	IOLTA	\$ 381,820	See above	See above	\$ 92,540	24%	Approve	In early March 2020, the SDVLP staff attorney who was located at the San Diego Family Justice Center (FJC) resigned. The plan was to hire a replacement, however, the pandemic and subsequent lockdown began. The FJC shut down almost completely, and we did not hire another attorney for that position. It is for this reason that we were unable to expend the funds.
18	USD School of Law Legal Clinics	11/29/2020	IOLTA	\$ 220,090	N/A	N/A	\$ 31,418	14%	Approve	Due to the COVID-19 global pandemic, our organization made a strategic decision to conserve 2020 IOLTA/EAF grant funds for 2021 carry-over by using other available funds whenever possible. Our University, like most Universities in the country, is experiencing a massive loss in tuition revenue during the 2020-2021 academic year due to the COVID-19 pandemic, which will certainly result in additional budget cuts in 2021. It is our hope and expectation that carrying-over 2020 IOLTA/EAF funds into 2021 will allow our organization to continue to provide the same high level of service to our clients despite these budget challenges. In addition, one of our Spanish speaking Paralegals left for another position in January 2020. We were able to reallocate the Paralegal's work to other existing Spanish speaking clerical staff members. One of the existing Spanish speaking clerical staff members began taking evening classes to become a Paralegal during the Fall 2020 semester. The tuition for the Paralegal classes and required textbooks were paid for by the USD Legal Clinics, but not using IOLTA/EAF funds. Finally, our Spanish speaking Paralegal funded by the EAF grant worked slightly less hours during the calendar year than originally projected due to additional responsibilities at home due to the COVID-19 pandemic. Thank you for your time and consideration of our carry-over request.
19	Worksafe, Inc.	11/2/2020	IOLTA	\$ 378,962	-	Under 10%	\$ 51,440	14%	Approve	Worksafe received a Paycheck Protection Program (PPP) loan by the Small Business Administration.
20	Worksafe, Inc.	11/2/2020	EAF	\$ 160,367	-	Under 10%	\$ 16,380	10%	Approve	Worksafe received a Paycheck Protection Program (PPP) loan by the Small Business Administration.