

**LEGAL SERVICES TRUST FUND COMMISSION  
PARTNERSHIP GRANTS COMMITTEE MEETING  
Meeting Summary and Action Items**

Thursday, July 29, 2021, 10:00 a.m.–12:00 p.m.  
State Bar of California (Conference Call via Zoom)

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**Roll Call**

**Members Present**

Chair Christina Vanarelli  
Will Boschelli  
Eric Isken  
Christian Schreiber

**Advisors**

Judge Lisa R. Jaskol  
Justice William J. Murray, Jr.

**Liaisons**

Bonnie Hough  
Zach Newman (standing in for  
Salena Copeland)  
Melanie Snider

**Staff**

Christal Bundang  
Erica Carroll  
Elizabeth Hom  
Doan Nguyen  
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**Members Absent**

Kim Bartleson

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**OPEN SESSION**

Chair Vanarelli called the meeting to order at 10:00 a.m.

**I. ROLL CALL**

Roll call was taken, and quorum was established.

**II. CALL FOR PUBLIC COMMENT**

Chair Vanarelli invited members of the public to comment on any items on the agenda. The following comment was made: Zach Newman of Legal Aid Association of California (LAAC) voiced LAAC's support for staff recommendations presented in the meeting materials.

**III. CONSENT**

**A. Approval of Meeting Summary and Action Items from June 18, 2021 Meeting**

The committee approved the June 18, 2021, meeting summary and action items by unanimous roll call vote (Isken moved, Schreiber seconded).

**IV. DISCUSSION AND ACTION ITEMS**

**A. Discuss and Approve 2022 Partnership Grant Recommendations**

At its June 18 meeting, the committee asked staff to gather more information from Riverside Legal Aid (RLA) before finalizing award amounts. Senior Program Analyst Christal Bundang reported that staff met with RLA and the partner court to discuss the planned hybrid clinic model (paralegal support and document preparation assistance) in response to notice of a tentative award amount lower than the organization requested. She indicated that the Superior Court was aware of the changes to the original

proposal and in agreement with RLA's planned services. RLA also indicated that it was committed to seeking additional funding to make up the difference in order to return the clinic to the level of service it originally planned. Based on the information learned through follow up, staff recommended RLA at the same funding level as previously proposed.

After discussion the committee passed the following resolution by unanimous roll call vote (Schreiber moved, Isken seconded):

**RESOLVED**, that the Partnership Grants Committee approve the list of 2022 Partnership Grant allocation recommendations, as referenced in Attachment C. (See attachment.)

#### **B. Presentation on Feedback from 2022 Partnership Grant Applications**

Bundang presented an informational item regarding the feedback survey distributed to 2022 Partnership Grant applicants. The survey consisted of 16 questions and use a Likert scale. Six applicant organizations responded.

The general sentiment was that, while there is room for improvement with this new process, it appears the committee is moving in the right direction. Specific areas that were helpful included the use of the new scoring rubric, transparency about funding priorities, and providing an informational webinar early in the process. There was also a recommendation to host a second webinar during the application process to provide additional technical assistance.

The committee discussed the survey results and low response rate, whether it could signify that most applicants found the new process acceptable or if more outreach was required. Staff noted that among the survey respondents, some of them host multiple Partnership projects and thus represent a higher proportion of applications than might be apparent at first glance. The committee also focused on unfavorable responses from one organization and what steps could be taken to address concerns raised in that survey response.

In discussing next steps, all agreed that some rubric categories might be refined in the next iteration, and additional interfacing with applicants through a second webinar would also be helpful.

#### **C. Discuss and Approve Proposed Plan Regarding Additional 2022 EAF Partnership Funding**

Bundang reported that Governor Newsom signed budget bill SB 129 on July 12, which allocated an additional \$4.34 million to EAF Partnership Grants that must be encumbered or spent by June 30, 2023.<sup>1</sup> There was a subsequent bill modifying the budget, but it had no impact on this Partnership funding.

State Bar staff and Judicial Council staff met to make recommendations to the Partnership Committee regarding administration of the "Partnership Grant 2.0" (to distinguish it from regular Partnership funding).

In response to committee questions, staff reported there was no additional guidance from the Legislature about administering these grants; they would follow the typical process. However, there is a new reporting requirement, with a report due to the Legislature on January 1 each year. This may

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<sup>1</sup> Amount as reported at this meeting. The EAF Partnership Grant additional funding amount was subsequently adjusted at the August 13 Legal Services Trust Fund Commission meeting, where it was reported that \$3.88 million would be distributed.

require a move to semi-annual reporting, because year-end reporting won't be finalized in time to issue a report on January 1.

To avoid delay in disbursements, staff recommended that Partnership Grant 2.0 be administered separately from the 2022 grants approved in agenda item IV.A., and under a new RFP. Applicants under Partnership Grant 2.0 would be subject to the same threshold eligibility requirements (qualified legal services project, joint Court/QLSP project, self-represented litigants) and utilize the same 2022 scoring rubric. Staff also noted that the prior requirement that the project be located "at or near courthouse" doesn't appear to be a mandatory criterion and was omitted from the 2022 RFP.

The committee then discussed two possible options for organizations applying for Partnership Grant 2.0 funding:

Option 1: Only existing 2022 grant recipients (as approved in item IV.A.) would be eligible to apply for supplemental funding. This option would provide grantees an opportunity to improve their applications and demonstrate why supplemental funding should be awarded. Staff would provide the full rubric scores and technical assistance as needed, and this funding would have a shortened grant period (April 2022-December 2022). Under this option, applicants would only be permitted to request up to the amount of their originally requested grant amount.

Discussion included whether to increase the possible funding range from \$120,000 to \$150,000; whether this would require applicants to expand the services they are offering or to merely address any deficiencies in their prior application; and whether this would give staff and the committee enough time to prepare and administer these grants. Timing of payments was also discussed: Partnership Grant payments are paid annually in January; if the Partnership Grant 2.0 funding were used as a supplement to an existing project, organizations would have discretion to evenly distribute expenses for the whole year by using more of the initial Partnership payment in the first quarter, knowing that additional funding from Partnership Grant 2.0 would be disbursed in the second quarter.

Option 2: All applicants would submit a new application. The intent of this option would be to encourage applicants to develop unique and larger scope projects or propose substantial expansion of an existing project, with an extended 21-month grant period (April 2022 - December 2023).

Due to time constraints, and to ensure consistency in review, the new application would use the same 2022 scoring rubric. Discussion centered on whether carryovers would be permitted; a suggested funding range of \$75,000 to \$300,000; how to prioritize and target outreach efforts; and flexibility towards funding more technology-based projects.

Following discussion of this substantial one-time increase in Partnership Grant funding, the committee decided to offer both options to applicants. Offering two application options would involve setting aside a portion of the funding to allow projects that weren't fully funded in 2022 to seek that additional funding under option 1, and the remaining funding would go to new projects under option 2. Staff noted a similar process was followed with a different discretionary grant, with some authority delegated to staff in order to ease review of two sets of applications. Staff confirmed this would not delay the current round of 2022 funding slated for disbursement in January 2022 and reminded the committee that any unallocated funding would be returned to the Equal Access Fund for formula distribution.

The committee discussed the benefits and challenges of administering such a large increase for one year in general. Judicial Council staff reported that it was also possible that there may be a sustained increase in funding, though not as high as this one-time increase.

A general timeline of September/October outreach to courts and QLSPs, release of an RFP in November, and an application due date of December 17 were considered.

After discussion, the committee passed the following resolution by unanimous roll call vote (Boschelli moved, Isken seconded):

**RESOLVED**, that the Partnership Grants Committee recommends that the Legal Services Trust Fund Commission approve the proposed plan for the additional Partnership Grant funding:

- Administer the additional funding as a separate grant opportunity
- Require that all applicants meet threshold eligibility requirements
- Utilize the same 2022 Partnership Grants Scoring Rubric
- Allow applicants to apply for supplemental funding for an existing 2022 Partnership Grant project and/or new project proposal
- Adopt the proposed grant administration timeline from July 2021 – December 2023, with specific dates to be confirmed following approval

## **V. ADJOURN**

There being no other business, the meeting was adjourned at 11:41 a.m.

**2022 Partnership Grant Funding Recommendations**  
**To be completed at the July 29, 2021 Partnership Grant Committee Meeting**

Total Amount Requested:	\$3,094,000
<b>Total Amount Available:</b>	<b>\$2,580,574</b>
2021 Amount Awarded (for reference)	\$2,420,000

Organization	Project Title	Rubric Score				Total Amount Requested	2021 Award Allocation	PG Committee Tentative Funding Recommendation (as of May 7, 2021)	PG Committee Funding Recommendations (as of July 29, 2021)
		Selection Criteria Total	Funding Priority	Innovation	TOTAL				
Bet Tzedek Legal Services	Decedent's Estate Self-Help Clinic (NEW)	63	20	2	85	\$ 120,000	N/A	\$ 120,000	\$ 120,000
Bet Tzedek Legal Services	Remote Pro Se Technology Initiative (NEW)	63	20	6	89	\$ 150,000	N/A	\$ 120,000	\$ 120,000
California Rural Legal Assistance, Inc.	San Joaquin Housing Helpline Court Clinic Partnership (NEW)	59	20	3	82	\$ 137,000	N/A	\$ 120,000	\$ 120,000
Central California Legal Services	Tulare County Unlawful Detainer Workshop	62	16	0	78	\$ 75,000	\$ 68,680	\$ 70,000	\$ 70,000
Central California Legal Services	Tenant/Landlord Housing Law Project	51	16	0	67	\$ 72,000	\$ 68,680	\$ 60,000	\$ 60,000
Central California Legal Services	Guardianship Project	43	12	0	55	\$ 65,000	\$ 58,868	\$ 41,000	\$ 41,000
Community Legal Aid SoCal	Compton Self-Help Economic Expansion Project (NEW)	54	20	2	76	\$ 92,000	N/A	\$ 92,000	\$ 92,000
Community Legal Aid SoCal	Orange County Consumer Debt Workshop/Clinic	54	16	0	70	\$ 29,000	\$ 22,566	\$ 23,000	\$ 23,000
Community Legal Aid SoCal	Unlawful Detainer Workshop - Norwalk Courthouse	55	12	0	67	\$ 66,000	\$ 68,680	\$ 60,000	\$ 60,000
Elder Law & Advocacy	Imperial County Unlawful Detainer Clinic	54.7	17.3	0	72.0	\$ 74,000	\$ 69,661	\$ 74,000	\$ 74,000
Family Violence Law Center	Domestic Violence Pro Per (DVPP) Project	56.7	12	0	68.7	\$ 25,000	\$ 24,528	\$ 21,000	\$ 21,000
Inland Counties Legal Services	Consumer Rights Clinic	54	12	0	66	\$ 95,000	\$ 92,227	\$ 88,000	\$ 88,000
Justice & Diversity Center of the Bar Association of San Francisco	Shriver - SASH Self-Help	54	16	0	70	\$ 71,000	\$ 39,246	\$ 36,000	\$ 36,000
LACBA Counsel for Justice	LACBA-Domestic Violence Legal Services Project	63	16	0	79	\$ 99,000	\$ 89,284	\$ 80,000	\$ 80,000
Legal Access Alameda	Family Law Settlement Conference	58	12	0	70	\$ 65,000	\$ 63,774	\$ 61,000	\$ 61,000
Legal Access Alameda	Family Law Day of Court	63	12	0	75	\$ 30,000	\$ 29,434	\$ 25,000	\$ 25,000
Legal Aid Foundation of Los Angeles	2022 - Torrance Self-Help Center	63	16	0	79	\$ 100,000	\$ 88,302	\$ 84,000	\$ 84,000
Legal Aid Foundation of Santa Barbara County	Legal Resource Center Partnership	56	12	2	70	\$ 125,000	\$ 114,793	\$ 115,000	\$ 115,000
Legal Aid of Marin	Homelessness Prevention through Mandatory Settlement Conferences	64	20	1	85	\$ 80,000	\$ 78,491	\$ 80,000	\$ 80,000
Legal Aid Society of San Bernardino	Caregivers and Small Estates Accessing Justice	51	12	0	63	\$ 138,000	\$ 98,114	\$ 85,000	\$ 85,000
Legal Aid Society of San Diego	Name Change & Gender Marker Change Self-Help Clinic	54	12	4	70	\$ 85,000	\$ 83,397	\$ 75,000	\$ 75,000
Legal Aid Society of San Diego	Unlawful Detainer Clinic Expansion Project	64	12	0	76	\$ 80,000	\$ 78,491	\$ 72,574	\$ 72,574
Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	54	12	0	66	\$ 87,000	\$ 63,774	\$ 60,000	\$ 60,000
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	54	8	0	62	\$ 67,000	\$ 63,774	\$ 48,000	\$ 48,000
Legal Services of Northern California	Yolo Consumer Clinic	59	20	0	79	\$ 67,000	\$ 62,000	\$ 67,000	\$ 67,000
Neighborhood Legal Services	STABILIZING FAMILIES PARTNERSHIP GRANT	54	16	0	70	\$ 102,000	\$ 98,114	\$ 100,000	\$ 100,000
Neighborhood Legal Services	CHATSWORTH CONSUMER TECHNOLOGY PARTNERSHIP GRANT	54	16	0	70	\$ 100,000	\$ 88,302	\$ 90,000	\$ 90,000
Neighborhood Legal Services	PASADENA CONTINUUM OF SERVICES	54	16	0	70	\$ 105,000	\$ 79,472	\$ 81,000	\$ 81,000
Public Counsel	Guardianship Clinic	59	8	2	69	\$ 60,000	\$ 29,434	\$ 22,000	\$ 22,000
Public Law Center	DeFacto & Adoptive Parent Assistance Project	59	16	0	75	\$ 50,000	\$ 49,057	\$ 47,000	\$ 47,000
Public Law Center	Orange County Courthouse Guardianship Clinic	54	12	0	66	\$ 60,000	\$ 39,246	\$ 32,000	\$ 32,000
Riverside Legal Aid	Small Estates Partnership	46	8	0	54	\$ 110,000	\$ 98,114	\$ 70,000	\$ 70,000
San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	61.7	16	4	81.7	\$ 130,000	\$ 98,114	\$ 93,000	\$ 93,000
San Luis Obispo Legal Assistance Foundation	San Luis Obispo County Rental Clinic	64	20	3	87	\$ 115,000	\$ 98,114	\$ 110,000	\$ 110,000
Santa Clara University Alexander Law Center	Consumer Debt Clinic	54	12	0	66	\$ 60,000	\$ 58,868	\$ 50,000	\$ 50,000
Senior Citizens Legal Services	Indigent Landlord/Tenant Services and Mediation (NEW)	65	20	5	90	\$ 108,000	N/A	\$ 108,000	\$ 108,000

<b>\$ 3,094,000</b>	<b>\$ 2,163,599</b>	<b>\$ 2,580,574</b>	<b>\$ 2,580,574</b>
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<b>Available</b>	<b>\$ 2,580,574</b>	<b>\$ 2,580,574</b>
<b>Balance</b>	<b>\$ -</b>	<b>\$ -</b>