

2021 Partnership Grant Budget Revision and Carryover Requests									
As prepared for the November 17, 2021 Legal Services Trust Fund Commission Meeting									
Carryover Requests									
No.	Organization Name	Project Name	2021 Grant Amount	Carryover Amount	Carryover %	Committee Recommendation or Action	Grantee explanations for material budget deviations and/or carry-over request	2020 Approved PG Carryover Amount	2022 PG Award
1	Community Legal Aid SoCal	Orange County Consumer Debt Workshop	\$22,566	\$9,000	40%	Approve	We did not expend as many hours as budgeted as we anticipated returning to the Court for onsite workshops by 2021. Operating remotely, our staff did not have travel time, setup time, or cleanup time. Because of our reduced personnel expenses, non-personnel expenses were reduced proportionately	N/A	\$23,000
2	Central California Legal Services	Tenant/Landlord Housing Law Project	\$68,680	\$68,680	100%	Not Approve	<p>CCLS plans to carryover the full 2021 allocations for two 2021 EAP projects – the Fresno Tenant/Landlord Housing Law (68,680) and the Tulare County UD Workshop (\$68,680). These projects were impacted with the loss of long-term staff coupled with the extreme difficulty CCLS has encountered in recruiting and retaining experienced attorneys. The continuing COVID-19 pandemic presented additional challenges for the projects with the closure of the courts to the public in both counties.</p> <p>The courts have also struggled to serve the public and as key partners, CCLS has partnered with the Courts who assisted in promoting the clinic sessions, however, that has not occurred as planned primarily due to the courts’ closures. At the same time, the multiple and confusing local, state and federal protections provided a false sense of safety from an eviction for tenants. While these protections have ended, the City of Fresno maintains a moratorium for city residents.</p> <p>A key lesson learned during the pandemic is that CCLS needs to adopt a more proactive and intentional approach to reach and inform low-income tenants of the projects’ availability. Prior to the pandemic, the project worked in coordination with community services and faith-based organizations to reach eligible tenants. The vast majority of these groups ceased in-person services and began working remotely which limited community outreach activities.</p> <p>To address these issues, CCLS is taking a new approach in informing low-income tenants to increase their participation with these two projects. With the 2021 EAP carryover funds, CCLS will place an outreach worker in each project to specifically create a marketing/outreach plan with the primary responsibility to inform and engage eligible tenants and the community of the projects’ existence and benefits. As the courts remain closed to the public with few exceptions, the projects do not currently have full access to carry out the activities and no dates have been provided as to a possible full reopening with access to court space. The outreach workers will identify potential alternative sites for the project services to continue; associated costs for these activities are including such as printing, travel, and increased supervision by the team leads. These activities will take place during the first six months of 2022 with the intent to spend down the 2021 funds and increase services throughout 2022.</p>	\$55,260 (78%)	\$60,000
3	Central California Legal Services	Tulare County Unlawful Detainer Workshop	\$68,680	\$68,680	100%	Not Approve		\$69,537 (99%)	\$70,000
4	Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	\$63,774	\$63,774	100%	Not Approve	<p>The Courts in Alameda County have only very recently opened certain courtrooms to the public. The Probate Court where the limited conservatorship cases are heard is still not open for in-person hearings. The Self-Help Center, one of the partners in the partnership, has brought it’s employees back to the courthouses but they are still meeting with litigants virtually. This means that we are still unable to hold in-person workshops and assist in-person on the pro per day of court. We have pivoted to provide one-on-one services to assist litigants with the extensive paperwork necessary to file a petition for limited conservatorship. We also provide one-on-one assistance with the next step, serving the parties with notice. We will continue to provide these services one on one until it is safe to resume the workshops at the Self-Help Center.</p> <p>We have been working with the court to determine how best we can assist litigants with their procedural issues on the day of court. We were given approval from the court for three LAS staff members to have moderator access for the court calendar so we can put the litigants in break-out rooms where volunteers can assist them. Unfortunately, after two of the LAS staff members were trained, this process was stalled because the court was considering hearing these cases in person again. When we learned that the court determined it was not yet appropriate to hear the cases in person, we re-visited our ability to assist litigants virtually on the day of court. Two of the long-time volunteers through Legal Access Alameda who have been trained on limited conservatorships have agreed to assist us with a pilot of this approach. We will be starting with the afternoon calendar on the first and third Thursdays of the month. Our first day of court will take place on November 18, 2021 (there were no pro per litigants scheduled on the November 4th afternoon calendar). Once we work out the kinks, we will be working with the court to assist on the morning calendars as well. We have been spending time networking and trying to get the work out about our services. We have worked closely with the Public Defender, who is appointed by the court to represent the proposed conservatees, to make sure he is familiar with the partnership. He has been referring families with procedural issues directly to us. The Self Help Center is having the flyer for this program translated into other languages and we are hopeful that this will help make more litigants aware of our services.</p>	\$41,008 (68%)	\$48,000

5	Neighborhood Legal Services	Consumer Technology Project	\$88,302	\$75,000	85%	Not Approve	<p>In 2021, NLSLA faced continuing challenges brought about by the 2020 Pandemic. In spite, feeling hopeful because of a vaccination rollout, the effects of the devastating economic impact and the harsh reality of both individual and collective loss and trauma that was felt by the community – NLSLA grappled with providing empathy and support for both staff and the community to heal. This struggle also affected the hiring of new positions. Many different substantive areas needed to hire and housing seemed to be the focus but there was a challenge finding the appropriate hire to meet the needs of the Partnership grants.</p> <p>Hiring for our Chatsworth Consumer Technology Grant was also challenged in spite of targeted outreach, multiple postings and several phone screens and interviews. Consumer debt calls were steadily responded to remotely by self-help staff through 2020 and have continued to rise steadily since early 2021. With the legislation converting past due rent into consumer debt, the need for this Partnership grant is ever more critical for poor people. Because SHLACs are preparing to return on November 8, 2021, we will need to provide the services to litigants both in person and remote.</p> <p>As a result, NLSLA is requesting to carryover \$75,000 of the 2021 Partnership Grant into 2022, to be spent in full by June 30, 2022. With the experienced attorney assisting the project at 40% capacity, adding a full time new attorney, and including 5% of Paralegal assistance, the carried over funds would support these positions through June 30, 2022. In addition, NLSLA was just awarded \$90,000 in 2022 Partnership Grant funding. With the carried over 2021 funds of \$75,000 and the 2022 award of \$90,000, we can sustain 1.40 FTE attorneys and 0.05 FTE paralegal for the 2022 calendar year to support the project.</p>	N/A	\$90,000
6	Neighborhood Legal Services	Stabilizing Families	\$98,114	\$83,000	85%	Not Approve	<p>In 2021, NLSLA faced continuing challenges brought about by the 2020 Pandemic. In spite, feeling hopeful because of a vaccination rollout, the effects of the devastating economic impact and the harsh reality of both individual and collective loss and trauma that was felt by the community – NLSLA grappled with providing empathy and support for both staff and the community to heal. This struggle also affected the hiring of new positions. Many different substantive areas needed to hire and housing seemed to be the focus but there was a challenge finding the appropriate hire to meet the needs of the this unique Partnership Grant.</p> <p>Hiring for our Stabilizing Families Grant was challenged in spite of targeted outreach and significant postings. Probate positions for self-help centers is a more difficult hire to make as not many probate services are offered. Furthermore, because the Court’s limited operations and self-help centers’ continued remote operation - litigants were able to receive information and education remotely. Now that we are preparing to return to SHLAC on November 8, 2021, we will need to provide the services to litigants both in person and remote. However, we are encouraged to report that we have in fact hired a lawyer and we are excited to deliver these services in Antelope Valley and Van Nuys.</p> <p>As a result, NLSLA is requesting to carryover \$83,000 of the 2021 Partnership grant into 2022, to be spent in full by June 30, 2022. With the newly hired attorney stationed in Antelope Valley and adding a full time Paralegal to be stationed in Van Nuys, the carried over funds would support these positions for 6 months. In addition, NLSLA was just awarded \$100,000 in 2022 Partnership Grant funding. With the carried over 2021 funds of \$83,000 and the 2022 award of \$100,000, we ca sustain 1 FT Attorney and 1 FT Paralegal for 2022 to staff the project.</p>	N/A	\$100,000
7	Elder Law & Advocacy	Imperial County Unlawful Detainer Clinic	\$69,661	\$7,171	10%	Staff Approved	The circumstances that resulted in the organization's under expenditures in Attorneys and Employee Benefits are due to the continued effect of: 1) receiving of Payroll Protection Program loan funds that were used during the months of May, June and July to pay salaries; and 2) COVID-19 shelter in place / courthouse closing in March 2020 required the organization to transition from the previously in person clinics to one-on-one telephone or electronic form of assistance. During this transition, the staff attorney was allocating a lower percentage of their time to this project. These two circumstances resulted in \$13,000 in Quarter 1 2021 expenditures that were used for 2020 Quarter 5 carry-over expenditures. We have reduced this initial carry-over by 45%, and in combination with staffing modifications that went into effect on July 1, 2021, we expect to continue to spend down the rest of the funds in 2021.	\$19,931 (29%)	\$74,000
8	Family Violence Law Center	Domestic Violence Pro Per Project	\$24,528	\$3,300	13%	Staff Approved	Extra pandemic-related grant funds were available in 2021 that needed to spent down earlier than December 31, 2021.	N/A	\$21,000
Budget Revisions									
No..	Organization Name	Project Name	2021 Grant Amount	Budget Revision Amount	Budget Revision %	Staff Recommendation	Grantee explanations for material budget deviations and/or carry-over request		
1	Central California Legal Services	Tenant/Landlord Housing Law Project	\$68,680	\$31,209	45%	Approve	Adjusting staffing plan to add a full-time outreach worker and related travel.		
2	Central California Legal Services	Tulare County Unlawful Detainer Workshop	\$68,680	\$26,469	39%	Approve	Adjusting staffing plan to add a full-time outreach worker and related travel.		

3	Neighborhood Legal Services	Stabilizing Families	\$98,114	\$27,358	28%	<b>Approve</b>	NLSLA retained 1.0 FTE attorney to be funded by the project to coincide with the award amount. All supervision and project support provided as in-kind. NLSLA had challenges filling this attorney position and has finally hired a new attorney starting November 1st. NLSLA is also adding a full-time paralegal to assist the attorney and the project with a hire date of January 1st. See also NLSLA's request to carryover \$83,000 of the 2021 PG funds into 2022
4	LACBA Counsel for Justice	LACBA Domestic Violence Legal Services Project	\$89,284	\$10	0%	<b>Self-Executing Approval</b>	Due to Covid-19, and new technology acquired to work remotely, at this time a new server is not requested under our technology budget. As courts reopen, and more volunteers are allowed to return, the need may once again be there as to allow for assistance with in person orders. A reduction was made in office supplies and a lowering in the requested amount for liability assistance
5	Community Legal Aid SoCal	Unlawful Detainer Workshop at Norwalk Superior Courthouse	\$68,680	\$962	1%	<b>Self-Executing Approval</b>	Reduced benefits paid by Trust Fund monies from 29% to 27%; 2% benefits to be paid by non-Trust Fund monies. October 2021 - project originally anticipated \$994 in travel costs. These expenses were not realized, and we will move the funding to the Attorney salary and benefits. This represents about 1.4% of this project budget, so we are not making a formal budget revision request.
6	Community Legal Aid SoCal	Orange County Community Court	\$34,340	\$967	3%	<b>Self-Executing Approval</b>	Reduced benefits paid by the program from 29% to 27%; added 2% benefits to "Non-Trust Fund Monies" and reduced evaluator expenses.
7	Elder Law & Advocacy	Imperial County Unlawful Detainer Clinic	\$69,661	\$2,438	4%	<b>Self-Executing Approval</b>	Increase in Non Personnel Expenses and decrease in Administrative Expenses. Decrease in Administrative Expenses is due to Administrative costs for 1st Quarter or 2021 were carried over to 2020 Partnership Grant. Although the budget revisions are only 6%, I included the revised budget in order for the Carryover calculations to be accurate.
8	Community Legal Aid SoCal	Orange County Consumer Debt Workshop	\$22,566	\$2,679	12%	<b>Staff Approved</b>	Slightly decreased benefits paid by Trust Fund monies; increased administrative staff to reflect de minimis (10%) expense for grant administration.
9	Legal Aid Society of San Bernardino	CAREGIVERS ACCESSING JUSTICE	\$98,114	\$13,502	14%	<b>Staff Approved</b>	The budget reflects the awarded amount which was \$1886 less than the requested sum. The pandemic and the resulting closure of the court resulted in our agency extending offsite and electronic document preparation, which resulted in an increase of paralegal/legal assistant time. This revision reflects an increase in paralegal/caseworker times to 2.8 FTE and attorney time at 1.0 FTE, with a portion of those wages and fringe benefits being covered with other Trust Fund money. One hundred percent of this revised budget was attributed to personnel, with other contributing funds covering the non-personnel costs.
10	Neighborhood Legal Services	Consumer Technology Project	\$88,302	\$14,372	16%	<b>Staff Approved</b>	The budget reflects the awarded amount which was \$1886 less than the requested sum. The pandemic and the resulting closure of the court resulted in our agency extending offsite and electronic document preparation, which resulted in an increase of paralegal/legal assistant time. This revision reflects an increase in paralegal/caseworker times to 2.8 FTE and attorney time at 1.0 FTE, with a portion of those wages and fringe benefits being covered with other Trust Fund money. One hundred percent of this revised budget was attributed to personnel, with other contributing funds covering the non-personnel costs.
11	Inland Counties Legal Services	Consumer Rights Clinic	\$92,227	\$18,367	20%	<b>Staff Approved</b>	The Partnership budget was increased 0.13 FTE staff attorney, decreased 0.02 FTE paralegal, and increased 0.04 FTE legal secretary with corresponding changes in non-trust fund monies for the same FTE. Allocation of all other expense categories were adjusted accordingly, since they were calculated based on FTE allocation.