

2021 IOLTA Grant Budget Revision and Carry-Over Requests						
As prepared for the December 10, 2021 Eligibility & Budget Review Committee Meeting						
Carryover Requests						
No.	Organization Name	2021 Grant Amount	Carryover %	Staff Recommendation	Grantee explanations for material budget deviations and/or carry over request	2022 IOLTA Award
1	Asian Americans Advancing Justice - Los Angeles	\$530,860	50%	Defer to Committee	In addition to prioritizing spending down our 2020 State Bar IOLTA and EAF carry-over funds, we also received a PPP loan that required us to allocate expenses to other funding sources during a time-limited period in 2020 to be eligible for loan forgiveness. As a result, we under-spent our 2021 State Bar IOLTA and EAF funds though expect to fully spend this down by June 2022.	\$567,620
2	California Rural Legal Assistance, Inc.	\$1,650,553	49%	Defer to Committee	The COVID-19 pandemic has and is continuing to have impact on our organization related to voluntary turnover, where we believe may be attributable to the “Great Resignation”. Specifically, related to the demand in Attorney workforce, the market has created competition with increased compensation expectations where we cannot compete. In addition, due to the volatility of funding for Legal Aid Organizations, CRLA has positioned itself to carryforward funding into 2022 to maintain continuity in meeting Rural California Civil Legal Service community needs by preserving our current workforce.	\$2,610,210
3	Disability Rights California	\$2,323,926	71%	Defer to Committee	<p>In 2020, when Disability Rights California learned that the economic impact of the pandemic would affect future IOLTA Trust Fund and Equal Access grant funding, we took immediate steps to reduce spending and preserve funds to be used for ongoing personnel costs. We reviewed the one-time projects in the 2020 IOLTA Trust Fund budget and quickly decided to indefinitely postpone the capital project as well as some of the technology initiatives. In addition, we instituted a hiring freeze and did not move forward with new positions, which had not been filled yet, that were included in the IOLTA Trust Fund CY2020 budget. By implementing these expense reductions we generated carryover funds that were used in CY2021 when the IOLTA and EA grants were significantly reduced. Using carryover funds, we were able to preserve all current staff positions as well as restore some positions that were frozen in 2020.</p> <p>The 2021 IOLTA carryover funds will be fully utilized prior to June 30, 2022. We appreciate the flexibility of the State Bar in helping us to bridge the loss of funding between 2020 and 2021 with carryover funds.</p> <p>We do not expect to have EA carryover funds as that grant should be fully expended by the end of December, 2021. While there are some variations in spending between actual and budget, none of the line items are over 10% so a budget revision has not been submitted.</p>	\$3,363,340

4	Los Angeles Center for Law and Justice	\$95,390	59%	Defer to Committee	The COVID-19 pandemic and its unpredictable consequences resulted in LACLJ ending up unable to use the 2020 State Bar funds as initially intended. Following the generous extension of the 2020 IOLTA/EAF funds through the end of 2021, LACLJ was able to prioritize maximizing the usage of the 2020 funds and adjusting as necessary throughout the calendar year as unexpected sources of funding materialized (CARES Act and PPP) and expenses fluctuated from the norm. However, this resulted in us having to push back the spending of the 2021 IOLTA/EAF funds, and resulted in a larger carryover amount.	\$168,240
Budget Revisions						
No.	Organization Name	2021 Grant Amount	Budget Revision %	Staff Recommendation	Grantee explanations for material budget deviations and/or carry over request	
1	Greater Bakersfield Legal Assistance	\$384,630	28%	Defer to Committee	<p>Greater Bakersfield Legal has had extraordinary challenges in maintaining staffing. This is attributable to several factors. First, the pandemic has mobilized the job market, making higher paying larger city jobs available to local talent. Secondly, we have had several employees out on family leave during the year. Lastly, establishing a hybrid work model based on courts closing in person and re-opening partially has made it difficult to achieve continuity in our work force.</p> <p>GBLA had large carryovers from the prior year, caused primarily by the onset of the pandemic, which exacerbated the current year carryover. Although we will have spent the 2020 carryover during 2021, it compounded the under spending in the current year.</p> <p>The final contributor to our under spending is in non-personnel, which is in some line items allocated a proportional share. This share is calculated using FTE (Full Time Equivalent) personnel, and therefore under spent based on the prior mentioned vacancies.</p>	

2021 EAF Grant Budget Revision and Carry-Over Requests						12/8/2021
As prepared for the December 10, 2021 Eligibility & Budget Review Committee Meeting						
Carryover Requests						
No.	Organization Name	2021 Grant Amount	Carryover %	Staff Recommendation	Grantee explanations for material budget deviations and/or carry over request	2022 EAF Award
1	Greater Bakersfield Legal Assistance	\$342,960	76%	Defer to Committee	<p>APPLIES TO BOTH IOLTA & EAF:</p> <p>Greater Bakersfield Legal has had extraordinary challenges in maintaining staffing. This is attributable to several factors. First, the pandemic has mobilized the job market, making higher paying larger city jobs available to local talent. Secondly, we have had several employees out on family leave during the year. Lastly, establishing a hybrid work model based on courts closing in person and re-opening partially has made it difficult to achieve continuity in our work force.</p> <p>GBLA had large carryovers from the prior year, caused primarily by the onset of the pandemic, which exacerbated the current year carryover. Although we will have spent the 2020 carryover during 2021, it compounded the unders pending in the current year.</p> <p>The final contributor to our under spending is in non-personnel, which is in some line items allocated a proportional share. This share is calculated using FTE (Full Time Equivalent) personnel, and therefore under spent based on the prior mentioned vacancies.</p>	\$987,190