



The State Bar *of California*

DATE: March 11, 2022

TO: Members, Legal Services Trust Fund Commission

FROM: Eric Isken, Chair, Partnership Grants Committee

SUBJECT: Partnership Grant 2.0 Funding Recommendations

EXECUTIVE SUMMARY

The Budget Act of 2021 appropriated \$68,847,067 to the Equal Access Fund for distribution as legal aid grants. This resulted in an unanticipated increase in the available 2022 Partnership Grant funding that needed to be encumbered or spent by June 30, 2023. Because the 2022 Partnership Grants application review process was already well underway, a second funding opportunity, Partnership Grants 2.0 (PG 2.0), was created to disburse the additional 2022 Partnership Grant funding.

For the PG 2.0 application cycle, 27 proposals were received from 20 Qualified Legal Services Projects (QLSPs) requesting a total of \$4,717,478 in funding. The Partnership Grants Committee (PG Committee) delegated authority to scoring teams comprised of staff and Committee members to review and score all proposals using the previously approved scoring rubric. The purpose of the February 16 meeting is to review all proposals and rubric scores and to develop tentative funding recommendations.

The funding amount available for PG 2.0 distribution is \$3,880,237. The purpose of this memo is to provide background information on the PG 2.0 funding opportunity, an overview of the PG 2.0 review process, and a summary of the PG Committee's tentative funding recommendations for the Legal Services Trust Fund Commission's consideration.

BACKGROUND

The Partnership Grants program is established by the State Budget Act, which annually provides that "[t]en percent of the [Equal Access Fund] ... shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants." Funding is allocated through the Budget Act to the Judicial Council, and the Judicial Council has authority for final approval of grants. The State Bar administers the grant selection and distribution process through a contract with the Judicial Council. The Legal Services Trust Fund Commission

(Commission) oversees the administration of these grants, delegating primary responsibility for review and recommendations to the Partnership Grants Committee (PG Committee).

The Budget Act of 2021 appropriated \$68,847,067 to the Equal Access Fund for distribution as legal aid grants. This resulted in an unanticipated increase in the available 2022 Partnership Grant funding that needed to be encumbered or spent by June 30, 2023. Since the 2022 grant administration cycle concluded on July 29, 2021, the LSTFC decided to treat the additional \$3,880,237 Partnership Grant funding as a separate grant under a new Request for Proposal (RFP), naming it Partnership Grants 2.0 (PG 2.0). The LSTFC approved a timeline and distribution plan for PG 2.0. Notably, the LSTFC directed that PG 2.0 utilize the same scoring rubric used for the 2022 Partnership Grants and PG 2.0 applicants were given the option to apply for supplemental funding for an existing 2022 Partnership Grant project and/or complete and submit a new application.

To be considered for funding, all applicants and proposed projects must meet eligibility requirements as outlined in the Partnership Grants 2.0 RFP Requirements, Priorities, and Policies. The PG 2.0 RFP was released on November 12, 2021, with a deadline for submission of proposals of December 17, 2021.

DISCUSSION

PARTNERSHIP GRANT 2.0 REVIEW AND RUBRIC SCORING PROCESS

On November 4, 2021, the PG Committee discussed the review process for PG 2.0 applications. For applicants seeking supplemental funding, the PG Committee delegated authority to an ad hoc review team comprised of staff and one PG Committee member to review the applications and determine funding recommendations. The PG Committee determined that the focus of the supplemental application review was to confirm that applicants addressed prior deficiencies in their 2022 application (if any) and to ensure that applicants clearly described how supplemental funding would improve the project. The review team reviewed all 11 supplemental applications submitted.

The review process for applicants seeking funding for a new project or a substantial expansion of a current project differed slightly. In addition to delegating authority to an ad hoc review team, staff and PG Committee members engaged in an initial calibration process to ensure consistency in applying the scoring rubric. This entailed each committee member and staff independently reviewing and scoring three selected proposals for discussion at the PG Committee's January 14, 2021 meeting. The PG Committee discussed outlier scores, reasons for their own scores, and provided general guidance to the review team on how to apply the scoring rubric. Following initial calibration, the review team reviewed and scored the remaining 17 proposals, applying the guidance from the PG Committee. To address any scores that did not reach a consensus on a particular section, the review team took the average of each team member's score in order to calculate a final score. These scores were highlighted at the February 16 PG Committee meeting. An overview of the 28 funding proposals received is described in Attachment A.

TENTATIVE FUNDING RECOMMENDATIONS

Based on past practice and in consideration of the review process outlined above, the review team developed tentative funding recommendations, which were presented on February 16.

The review team's allocation approach was as follows:

- All 11 projects who submitted supplemental applications were fully funded
- New projects were fully funded if they scored at least or more than the average score of 83 total points
- New project awards were decreased by 15 percent from the total requested amounts for projects that scored 70 to 82 points
- New projects were not recommended for funding if they scored less than 70 points
- With remaining funds, after utilizing the allocation approach above, additional monies were allocated to the two new projects serving Riverside County because 11 out the 15 new projects are serving Los Angeles County.

Applicants not recommended for PG 2.0 funding will be encouraged to apply for the 2023 Partnership Grants cycle.

The Committee agreed with the review team's approach and finalized the tentative recommendations (Attachment B). Following the meeting, staff reached out to all applicants to share final rubric scores and the tentative funding recommendation amounts, and to follow up on any pending questions from the Committee. No issues arose from this follow up, and applicants with decreased tentative funding award amounts confirmed that they would be able to implement the PG 2.0 projects as proposed.

NEXT STEPS

Since the Judicial Council approved the PG 2.0 distribution plan and total allocation at its September 30-October 1, 2021, meeting, further approval by the Judicial Council is not required. Applicants will be informed of their approved PG 2.0 awards following the March 11 Commission meeting. Pending administrative follow up including execution of grant agreements, the grant period for both supplemental and new applications will begin on April 1, 2022, and funding will be disbursed by March 30, 2022.

RECOMMENDATION

Should the Legal Services Trust Funding Commission concur in the proposed action, passage of the following resolution is recommended:

RESOLVED, that the Legal Services Trust Fund Commission approve the list of Partnership Grant 2.0 allocation recommendations in Attachment B, as recommended by the Partnership Grants Committee.

ATTACHMENT LIST

- A.** February 16, 2022 Partnership Grants Committee Agenda Item and Attachments
- B.** Partnership Grant 2.0 Committee Funding Recommendations as of February 16, 2022



The State Bar of California

DATE: February 16, 2022

TO: Members, Partnership Grants Committee

FROM: Christal Bundang, Senior Program Analyst, Office of Access & Inclusion

SUBJECT: Partnership Grants 2.0 Proposals and Funding Recommendations

EXECUTIVE SUMMARY

The Budget Act of 2021 appropriated \$68,847,067 to the Equal Access Fund for distribution as legal aid grants. This resulted in an unanticipated increase in the available 2022 Partnership Grant funding that needed to be encumbered or spent by June 30, 2023. Because the 2022 Partnership Grants application review process was already well underway, a second funding opportunity, Partnership Grants 2.0 (PG 2.0), was created to disburse the additional 2022 Partnership Grant funding.

For the PG 2.0 application cycle, 27 proposals were received from 20 Qualified Legal Services Projects (QLSPs) requesting a total of \$4,717,478 in funding. The Partnership Grants Committee (PG Committee) delegated authority to scoring teams comprised of staff and Committee members to review and score all proposals using the previously approved scoring rubric. The purpose of the February 16 meeting is to review all proposals and rubric scores and to develop tentative funding recommendations.

The funding amount available for PG 2.0 distribution is \$3,880,237.

The purpose of this memo is to provide background information on the PG 2.0 funding opportunity, an overview of the PG 2.0 review process, and a summary of the supplemental and new proposals to aid the PG Committee's discussion.

BACKGROUND

The Partnership Grants program is established by the State Budget Act, which annually provides that "[t]en percent of the [Equal Access Fund] ... shall be for joint projects of courts and legal services programs to make legal assistance available to pro per litigants." Funding is allocated through the Budget Act to the Judicial Council, and the Judicial Council has authority for final approval of grants. The State Bar administers the grant selection and distribution process through a contract with the Judicial Council. The Legal Services Trust Fund Commission (LSTFC)

oversees the administration of these grants, delegating primary responsibility for review and recommendations to the Partnership Grants Committee (PG Committee).

The Budget Act of 2021 appropriated \$68,847,067 to the Equal Access Fund for distribution as legal aid grants. This resulted in an unanticipated increase in the available 2022 Partnership Grant funding that needed to be encumbered or spent by June 30, 2023. Since the 2022 grant administration cycle concluded on July 29, 2021, the LSTFC decided to treat the additional \$3,880,237 Partnership Grant funding as a separate grant under a new Request for Proposal (RFP), naming it Partnership Grants 2.0 (PG 2.0). The LSTFC approved a timeline and distribution plan for PG 2.0 (Attachment A). Notably, the LSTFC directed that PG 2.0 utilize the same scoring rubric used for the 2022 Partnership Grants and PG 2.0 applicants were given the option to apply for supplemental funding for an existing 2022 Partnership Grant project and/or complete and submit a new application.

To be considered for funding, all applicants and proposed projects must meet eligibility requirements as outlined in the Partnership Grants 2.0 RFP Requirements, Priorities, and Policies (Attachment B). The PG 2.0 RFP was released on November 12, 2021, with a deadline for submission of proposals of December 17, 2021.

DISCUSSION

PARTNERSHIP GRANTS 2.0 REVIEW AND SCORING RUBRIC PROCESS

On November 4, 2021, the PG Committee discussed the review process for PG 2.0 applications. For applicants seeking supplemental funding, the PG Committee delegated authority to an ad hoc review team comprised of staff and one PG Committee member to review the applications and determine funding recommendations. The PG Committee determined that the focus of the supplemental application review was to confirm that applicants addressed prior deficiencies in their 2022 application (if any) and to ensure that applicants clearly described how supplemental funding would improve the project. The review team reviewed all 11 supplemental applications submitted.

The review process for applicants seeking funding for a new project or a substantial expansion of a current project differed slightly. In addition to delegating authority to an ad hoc review team, staff and PG Committee members engaged in an initial calibration process to ensure consistency in applying the scoring rubric. This entailed each committee member and staff independently reviewing and scoring three selected proposals for discussion at the PG Committee's January 14, 2021 meeting. The PG Committee discussed outlier scores, reasons for their own scores, and provided general guidance to the review team on how to apply the scoring rubric. Following initial calibration, the review team reviewed and scored the remaining 17 proposals, applying the guidance from the PG Committee.

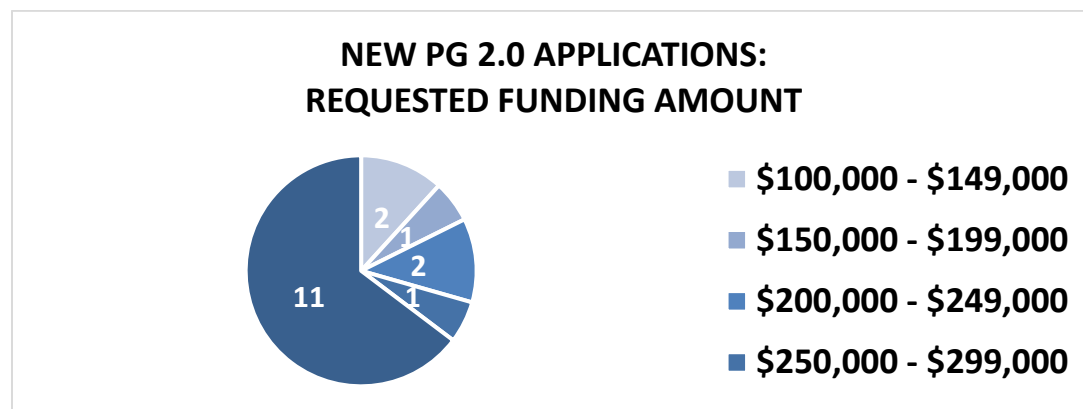
2022 PARTNERSHIP GRANT PROPOSALS OVERVIEW

Twenty-eight proposals were submitted requesting a total of \$4,717,478. Of the 28 proposals, 11 proposals (from 10 QLSPs) requested supplemental funding totaling only \$206,000 in funding requests. The remaining 17 proposals (from 13 QLSPs) for a new or substantial expansion to a current project submitted requests totaling \$4,511,478. Attachment C contains the supplemental applications and Attachment D contains the Profile Sheets for all new proposals.

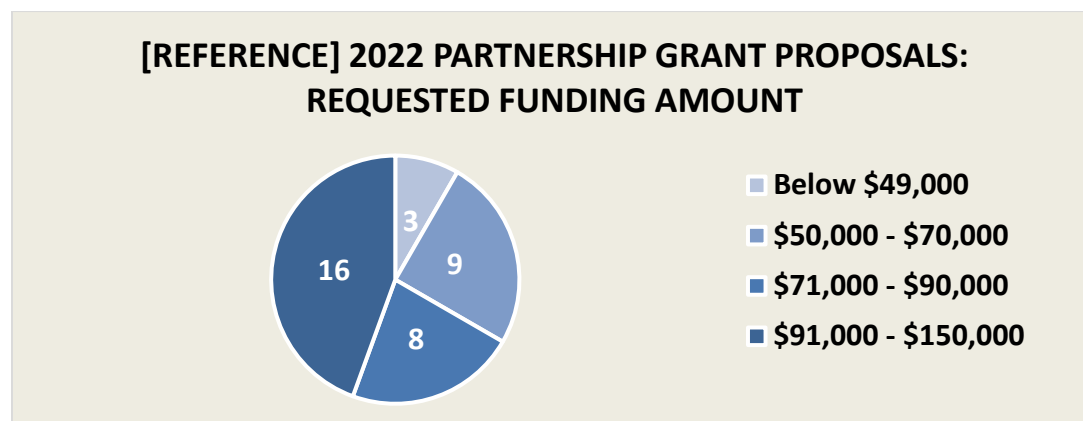
In addition to the scoring rubric, which has specific criteria to evaluate new PG 2.0 proposals, the following factors are provided as additional points for consideration by the PG Committee.

Funding Amounts

Applicants who submitted supplemental proposals requested amounts that ranged from \$4,000 to \$40,000. For applicants seeking new funding, requested funding amounts ranged from \$119,845 to \$300,000. PG Committee members will notice that the amounts requested were higher than those in the first round of PG funding. This is attributable to the fact that applicants were encouraged to develop innovative or substantial expansions to projects for a 21-month grant period, as opposed to the more typical 12-month period.

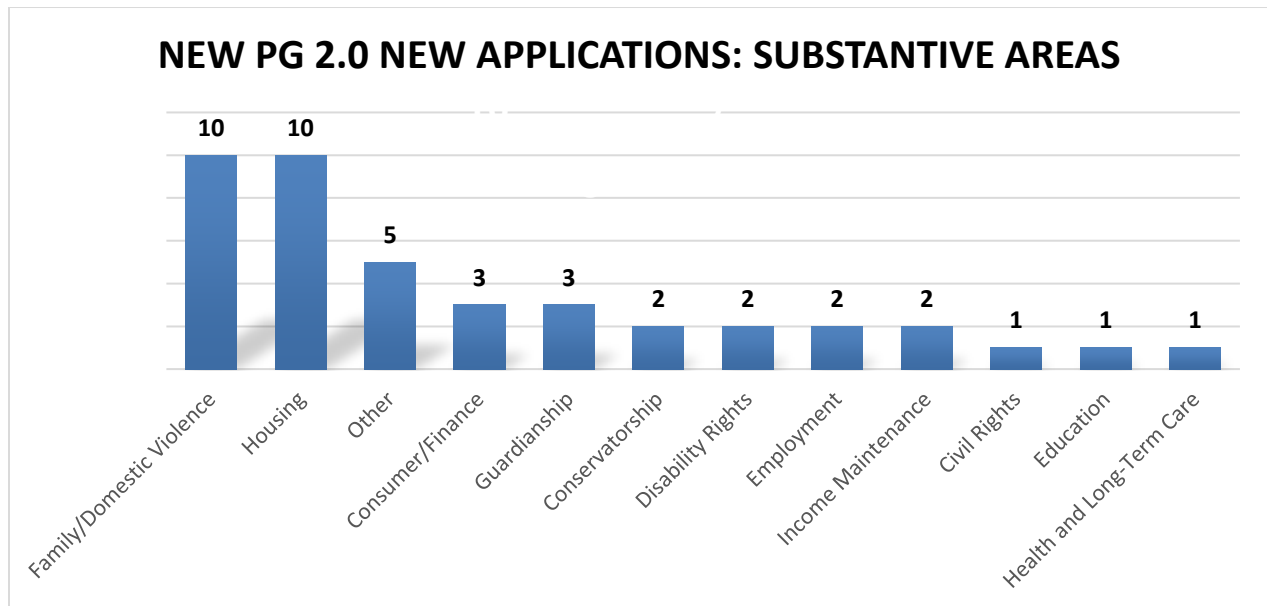


For the 2022 grant year, applicants requested amounts that ranged from \$49,000 to \$150,000. This funding range is consistent with prior grant years.

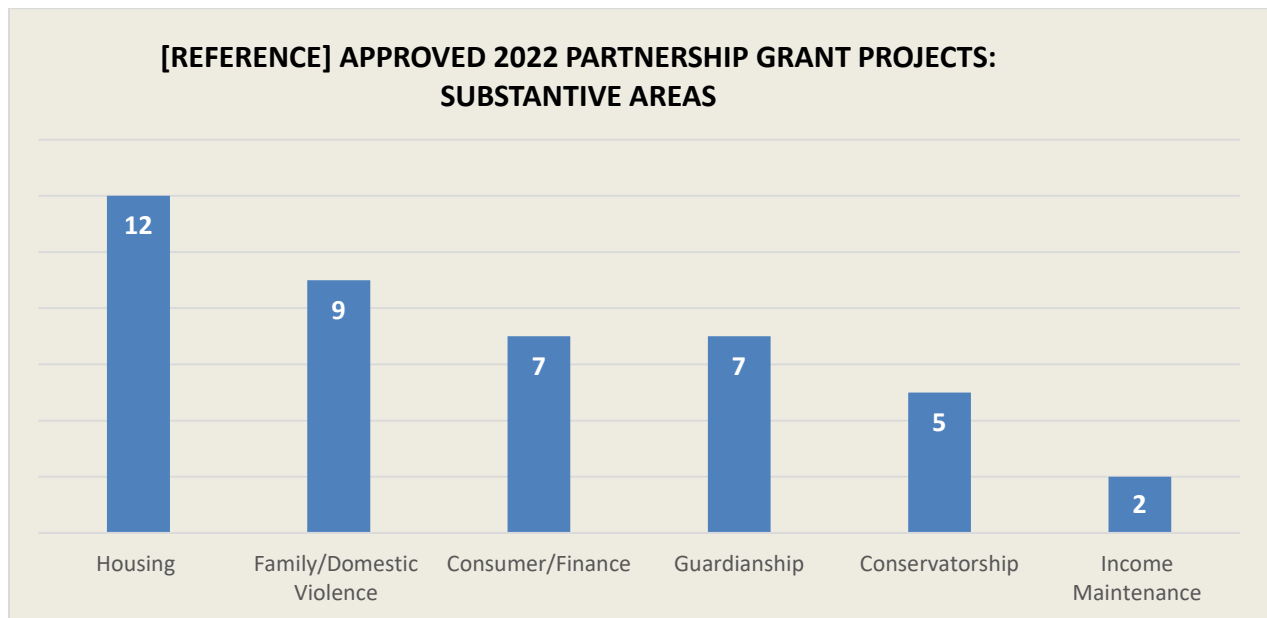


Substantive Areas

The majority of applicants requesting supplemental funding are seeking funding to support projects related to family law/domestic violence and guardianship matters. The new PG 2.0 project proposals focus on 12 substantive areas, with majority of projects providing services in family law/domestic violence and housing.

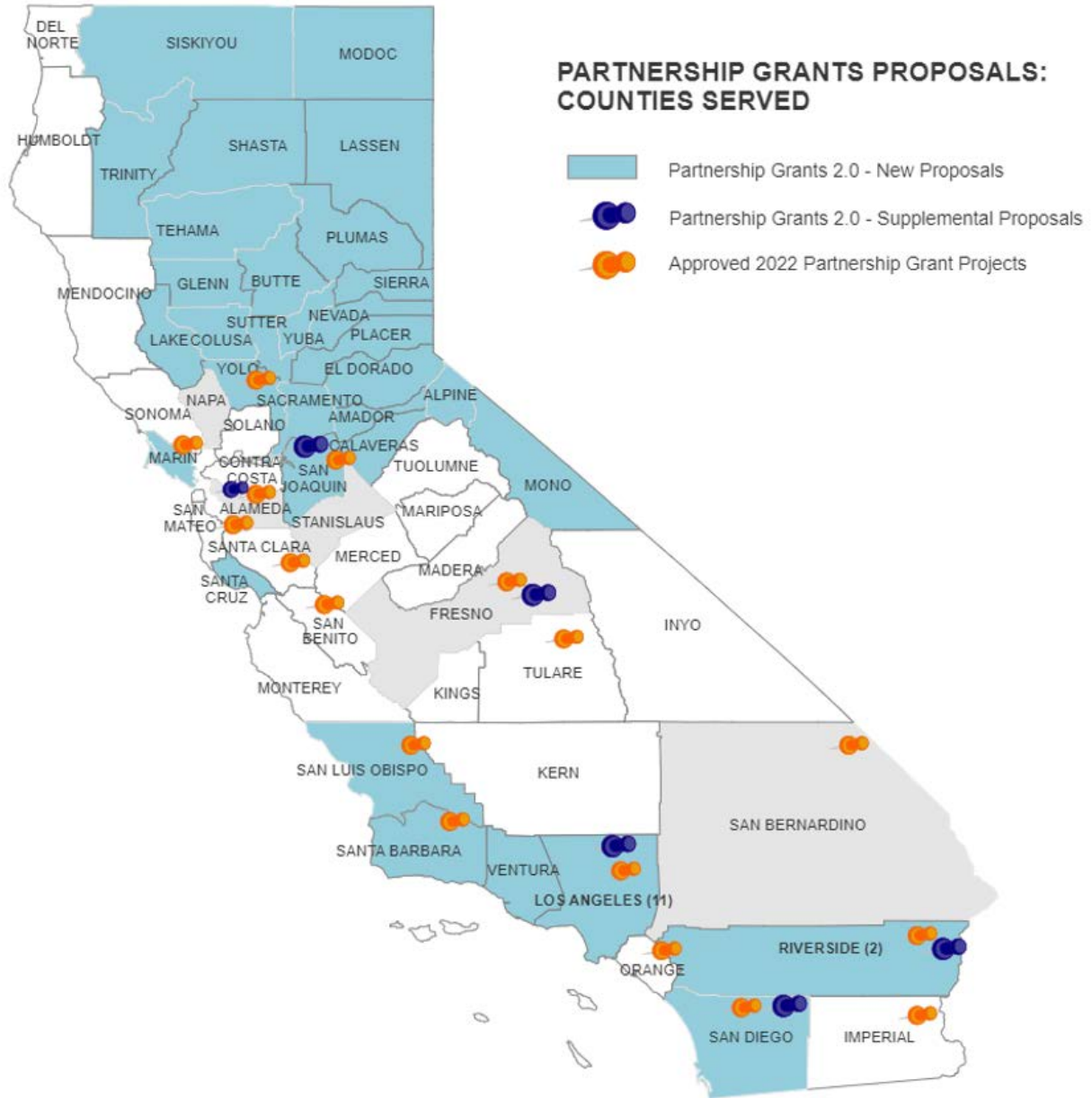


Similarly, half of the approved 2022 projects focused on housing and family/domestic violence.



Counties Served

The 17 proposed PG 2.0 projects span 31 counties in California, with the majority of projects (11), serving Los Angeles County. Two proposed projects would serve a total of 22 counties. In comparison, the 2022 Partnership Grant approved projects spanned 18 counties, with majority of project serving Los Angeles and Alameda Counties.



TENTATIVE FUNDING RECOMMENDATIONS

Based on past practice and in consideration of the review process outlined above, the review team developed tentative funding recommendations, which will be presented on February 16. Applicants not recommended for PG 2.0 funding will be encouraged to apply for the 2023 Partnership Grants cycle.

NEXT STEPS

Following the February 16 meeting, the final PG 2.0 allocation recommendations will be presented to the Legal Services Trust Fund Commission for approval on March 11. Since the Judicial Council approved the PG 2.0 distribution plan and total allocation at its September 30-October 1, 2021, meeting, and thus further approval by the Judicial Council is not required, grantees will be informed of their approved PG 2.0 awards following the March 11 Commission meeting. Pending administrative follow up including execution of grant agreements, the grant period for both supplemental and new applications will begin on April 1, 2022, and funding will be disbursed by March 30, 2022.

RECOMMENDATION

Should the Partnership Grants Committee concur in the proposed action, passage of the following resolution is recommended:

RESOLVED, that the Partnership Grants Committee approve the list of Partnership Grant 2.0 allocation recommendations, as finalized during the Committee's February 16 meeting.

ATTACHMENT LIST

- A.** Partnership Grant 2.0 Approved Timeline and Distribution Plan
- B.** Partnership Grant 2.0 RFP Requirements, Priorities, and Policies
- C.** Partnership Grant 2.0 New Project Profile Sheets
- D.** Partnership Grant 2.0 Supplemental Applications
- E.** Partnership Grant 2.0 Committee Rubric Scores and Funding Recommendations (to be completed on February 16)

PARTNERSHIP GRANT 2.0: TENTATIVE FUNDING RECOMMENDATIONS*as of the February 16, 2022 Partnership Grants Committee Meeting*

Total Amount Available:	\$ 3,880,237
Total Amount Requested:	\$ 4,717,478
<i>Option 1 (Supplemental) Amount Requested:</i>	<i>\$ 206,000</i>
<i>Option 2 (New) Amount Requested:</i>	<i>\$ 4,511,478</i>

Application Type	Organization	Acronym	Project Title	Rubric Score				Requested Amount	Review Team Funding Reco	PG Committee Reco as of 2/16/22
				Selection Criteria	Funding Priority	Innovation	TOTAL			
Supplemental	Bet Tzedek Legal Services	BetTzedek	Remote Pro Se Technology Initiative	63	20	6	89	\$ 30,000	\$ 30,000	\$ 30,000
Supplemental	California Rural Legal Assistance, Inc.	CRLA	San Joaquin Housing Helpline Court Clinic Partnership (Supplemental)	59	20	3	82	\$ 17,000	\$ 17,000	\$ 17,000
Supplemental	Central California Legal Services	CCLS	Guardianship Project	43	12	0	55	\$ 24,000	\$ 24,000	\$ 24,000
Supplemental	Family Violence Law Center	FVLC	Domestic Violence Pro Per (DVPP) Project	56.7	12	0	68.7	\$ 4,000	\$ 4,000	\$ 4,000
Supplemental	Inland Counties Legal Services	ICLS	Consumer Rights Clinic	54	12	0	66	\$ 7,000	\$ 7,000	\$ 7,000
Supplemental	LACBA Counsel for Justice	LACBA	LACBA Domestic Violence Legal Services Project (Supplemental)	63	16	0	79	\$ 19,000	\$ 19,000	\$ 19,000
Supplemental	Legal Access Alameda	LAA	Family Law Settlement Conference	58	12	0	70	\$ 4,000	\$ 4,000	\$ 4,000
Supplemental	Legal Access Alameda	LAA	Family Law Day of Court	63	12	0	75	\$ 5,000	\$ 5,000	\$ 5,000
Supplemental	Legal Assistance for Seniors	LAS	Partnership to Assist Guardianship Litigants	54	8	0	62	\$ 19,000	\$ 19,000	\$ 19,000
Supplemental	Riverside Legal Aid	RLA	Supp SEAP 2022	46	8	0	54	\$ 40,000	\$ 40,000	\$ 40,000
Supplemental	San Diego Volunteer Lawyer Program	SDVLP	Central Division Restraining Order Clinic	61.7	16	4	81.7	\$ 37,000	\$ 37,000	\$ 37,000
New	Bet Tzedek Legal Services	BetTzedek	Post-Hearing Virtual Services Project	60	16	4	80	\$ 300,000	\$ 255,000	\$ 255,000
New	Community Legal Aid SoCal	CLASC	LA County SHLAC Hybrid Bridge project	57	16	4	77	\$ 228,813	\$ 194,491	\$ 194,491
New	Inland Counties Legal Services	ICLS	Family Law Access Partnership (FLAP)	57	17	4	76	\$ 236,820	\$ 211,088	\$ 211,088
New	LACBA Counsel for Justice	LACBA	DVRO Remote Access Project	72	16	4	92	\$ 300,000	\$ 300,000	\$ 300,000
New	Legal Aid Foundation of Los Angeles	LAFLA	LAFLA Self Help Remote Technology Access Project - New	64	16	6	86	\$ 300,000	\$ 300,000	\$ 300,000
New	Legal Aid of Marin	LAM	Community Court Expansion	75	16	6	97	\$ 140,000	\$ 140,000	\$ 140,000
New	Legal Aid Society of San Bernardino	LASSB	Domestic Violence and Homeless Prevention	52	20	2	74	\$ 300,000	\$ 264,790	\$ 264,790
New	Legal Aid Society of San Diego	LASSD	East County Restraining Order Clinic	65	16	2	83	\$ 300,000	\$ 300,000	\$ 300,000
New	Mental Health Advocacy Services	MHAS	Mental Health Court Clinic	63	18	8	84	\$ 300,000	\$ 300,000	\$ 300,000
New	Neighborhood Legal Services	NLS	Bridge to Self-Help (BSH)	72	20	6	98	\$ 300,000	\$ 300,000	\$ 300,000
New	Neighborhood Legal Services	NLS	A2J: Navigating a Remote World	63	16	0	79	\$ 300,000	\$ 255,000	\$ 255,000
New	Neighborhood Legal Services	NLS	International Service - Hague Remote Self-Help	58	16	4	78	\$ 300,000	\$ 255,000	\$ 255,000
New	Neighborhood Legal Services	NLS	Remote UD Self-Help for San Gabriel Valley	52	16	0	68	\$ 300,000	\$ -	\$ -
New	Public Counsel	PublicCounsel	Guardianship Clinic Expansion	73	16	2	89	\$ 300,000	\$ 300,000	\$ 300,000
New	Public Counsel	PublicCounsel	Appellate Clinic Expansion	61	16	6	83	\$ 197,000	\$ 197,000	\$ 197,000
New	Senior Citizens Legal Services	SCLS	Expanded Indigent Landlord/Tenant Services and Mediation	65	16	0	81	\$ 119,845	\$ 101,868	\$ 101,868
New	UC Davis School of Law Legal Clinics	UCDavis	Partnership Grant 2.0	47	16	6	69	\$ 289,000	\$ -	\$ -

\$ 4,717,478	\$ 3,880,237	\$ 3,880,237
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Available	\$ 3,880,237	\$ 3,880,237
Balance	\$ 0	\$ 0