



The State Bar of California

DATE: July 21, 2022

TO: Members, Partnership Grants Committee
Members, Legal Services Trust Fund Commission

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

SUBJECT: 2023 Partnership Grant Funding Recommendations

EXECUTIVE SUMMARY

For the 2023 Partnership Grants application cycle, 31 proposals were received from 22 Qualified Legal Services Projects (QLSPs) requesting a total of \$2,899,034 in funding. The Partnership Grants Committee (PG Committee) delegated authority to review teams comprised of committee members and staff to review and score all proposals using the 2023 Partnership Grants scoring rubric. The PG Committee reviewed rubric scores and developed tentative funding recommendations at its May 12 meeting. The purpose of the July 21 meeting is to provide updates and to finalize the 2023 Partnership Grant funding recommendations.

The total funding amount available to allocate for the 2023 grant year is \$3,501,479.

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).

In reviewing 2023 Partnership Grant funding recommendations, the PG Committee should take into account all Partnership Grant funding currently available to applicants. 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 will need 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 for 2022 as a separate grant under a new Request for Proposal (RFP),

naming it Partnership Grants 2.0 (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. In March 2022, the LSTFC recommended funding of \$206,000 for 11 proposals supplementing approved 2022 Partnership Grant projects and \$3,674,237 for 14 new proposals for 2022-2023 Partnership Grant funding. The grants administration period for the supplemental PG 2.0 projects is April 1, 2022, to December 31, 2022 (9 months), whereas the period for new PG 2.0 projects is April 1, 2022, to December 31, 2023 (21 months)

The 2023 Partnership Grants is a separate funding opportunity pursuant to the Budget Act of 2022. In line with the State Bar's typical Partnership Grants, this funding opportunity is administered annually, with a grant period of January 1, 2023 – December 31, 2023.

To be considered for funding for the 2023 Partnership Grants, all applicants and proposed projects must meet eligibility requirements as outlined in the 2023 Partnership Grants RFP Requirements, Priorities, and Policies (Attachment A). The RFP was released on January 28, 2022, with a deadline for submission of proposals of March 18, 2022.

DISCUSSION

2023 PARTNERSHIP GRANTS REVIEW AND SCORING RUBRIC PROCESS

The LSTFC approved an updated 2023 Partnership Grants scoring rubric, which was streamlined to match category definitions as recommended by the Rules Committee. Because the 2023 Partnership Grants cycle would be the third time the PG Committee utilized a scoring rubric for application review, the committee considered its prior review processes. For the 2022 Partnership Grants, three review teams, comprised of two PG Committee members and one staff member reviewed the same assigned subset of proposals. For the new Partnership Grants 2.0 (PG 2.0), the PG Committee delegated authority to an ad hoc review team comprised of staff and one PG Committee member who reviewed all proposals. Taking a hybrid approach of the previous review processes, for the 2023 partnership Grants, the PG Committee delegated authority to an ad hoc review team. However, instead of only one PG Committee member participating in all calibration sessions, each PG Committee member participated in at least one session and reviewed a subset of proposals, with staff reviewing all proposals and participating in all calibration sessions.

Also, similar to the 2022 Partnership Grants and PG 2.0 review process, the PG Committee and staff 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 April 6, 2022, 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.

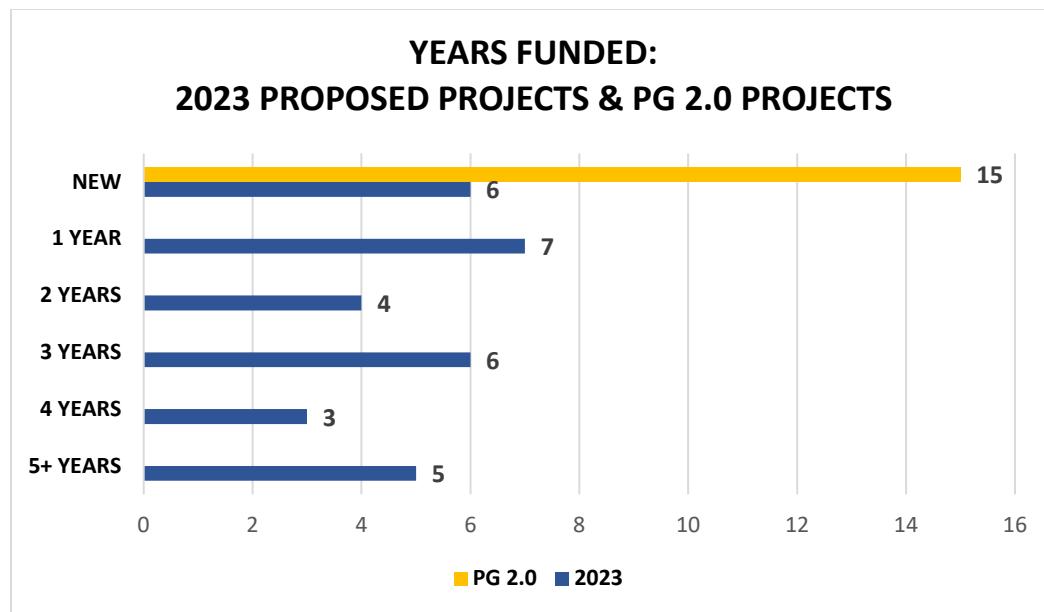
Following initial calibration, the review team, comprised of staff and a rotating committee member(s), reviewed and scored the remaining 28 proposals, applying the guidance from the PG Committee.

2023 PARTNERSHIP GRANT PROPOSALS OVERVIEW

Thirty-one proposals were submitted requesting a total of \$2,899,034. Attachment B contains Profile Sheets for all submitted proposals. In addition to the scoring rubric, which has specific criteria to evaluate the 2023 proposals, the PG Committee maintains its discretion when determining tentative funding recommendations and may consider additional factors. These factors include years funded, requested funding amounts, substantive areas, and counties served, as it has done in prior grant years. Acknowledging that the new PG 2.0 projects are currently operating until December 31, 2023, the PG Committee considered new PG 2.0 projects as another information point to understand the overall impact of Partnership Grant projects for the 2023 calendar year. The supplemental PG 2.0 projects were not included because that funding period ends on December 31, 2022.

Years Funded

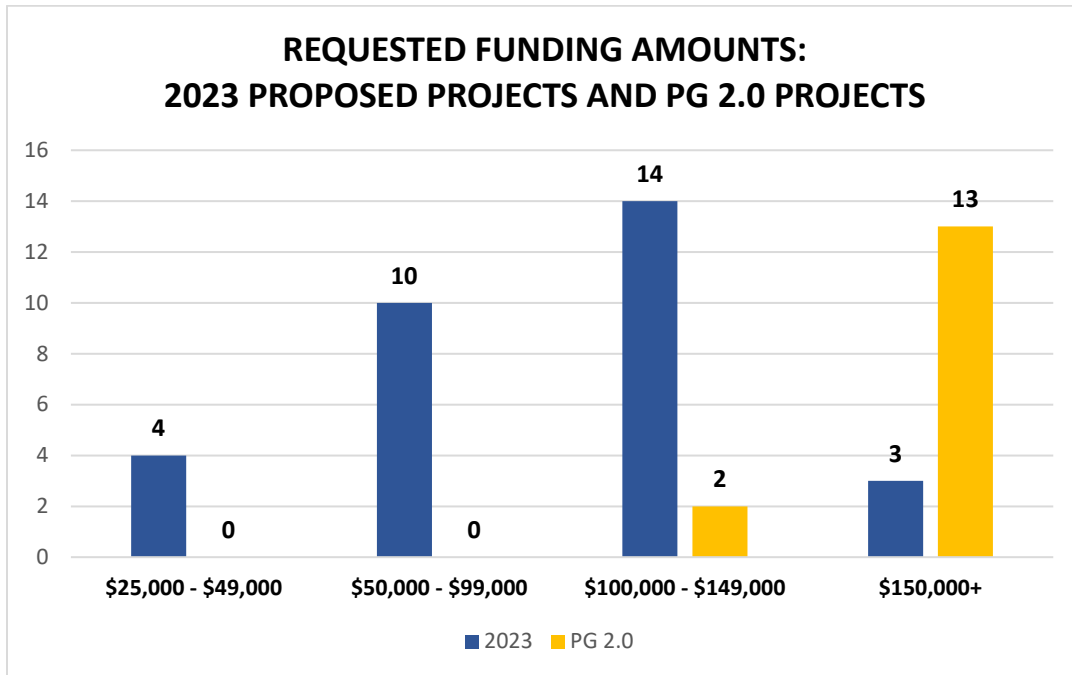
The majority of the 2023 proposed projects are currently funded. Six proposals are seeking funding for new projects and five projects are seeking funding beyond their fifth year. While prior years funded was a major factor when determining funding priority scores, the PG Committee also considered whether a first-time applicant with an existing project would warrant a slight decrease in points, or if a reapplying project was seeking a substantial expansion or change that would merit a higher score in the funding priority category.



Requested Funding Amounts

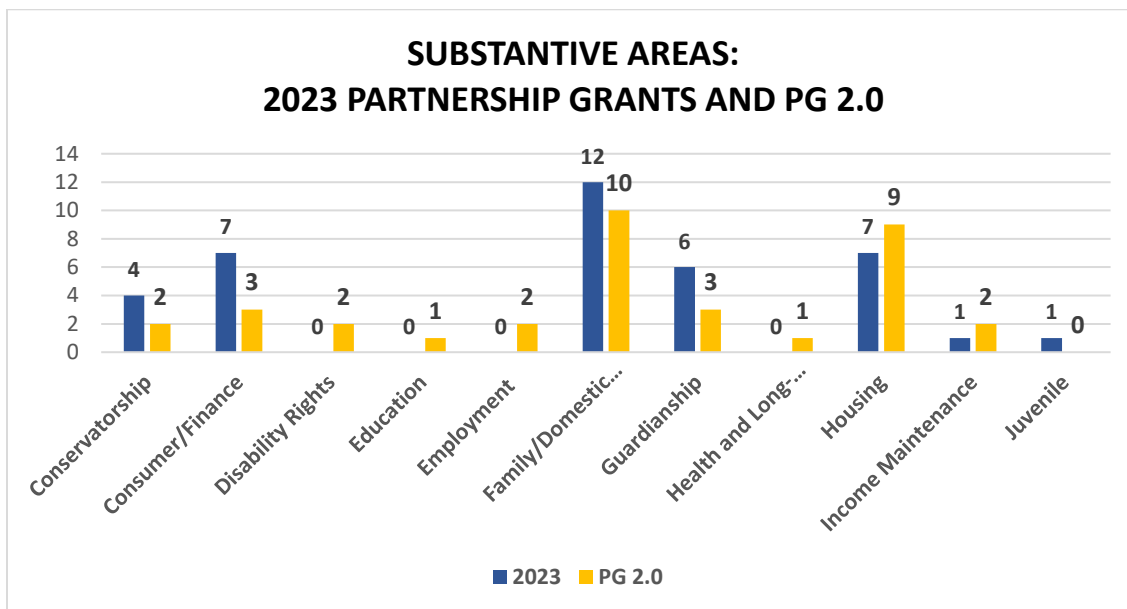
For the 2023 Partnership Grants year, applicants requested funding amounts ranging from \$25,000 to \$159,000. A majority of applicants requested amounts between \$50,000 and \$149,000. As a point of comparison, the PG 2.0 new projects requested substantially larger

grant amounts (\$149,000 - \$300,00) because of the extended 21-month grant period and were proposing new projects and/or substantial expansions to existing projects.



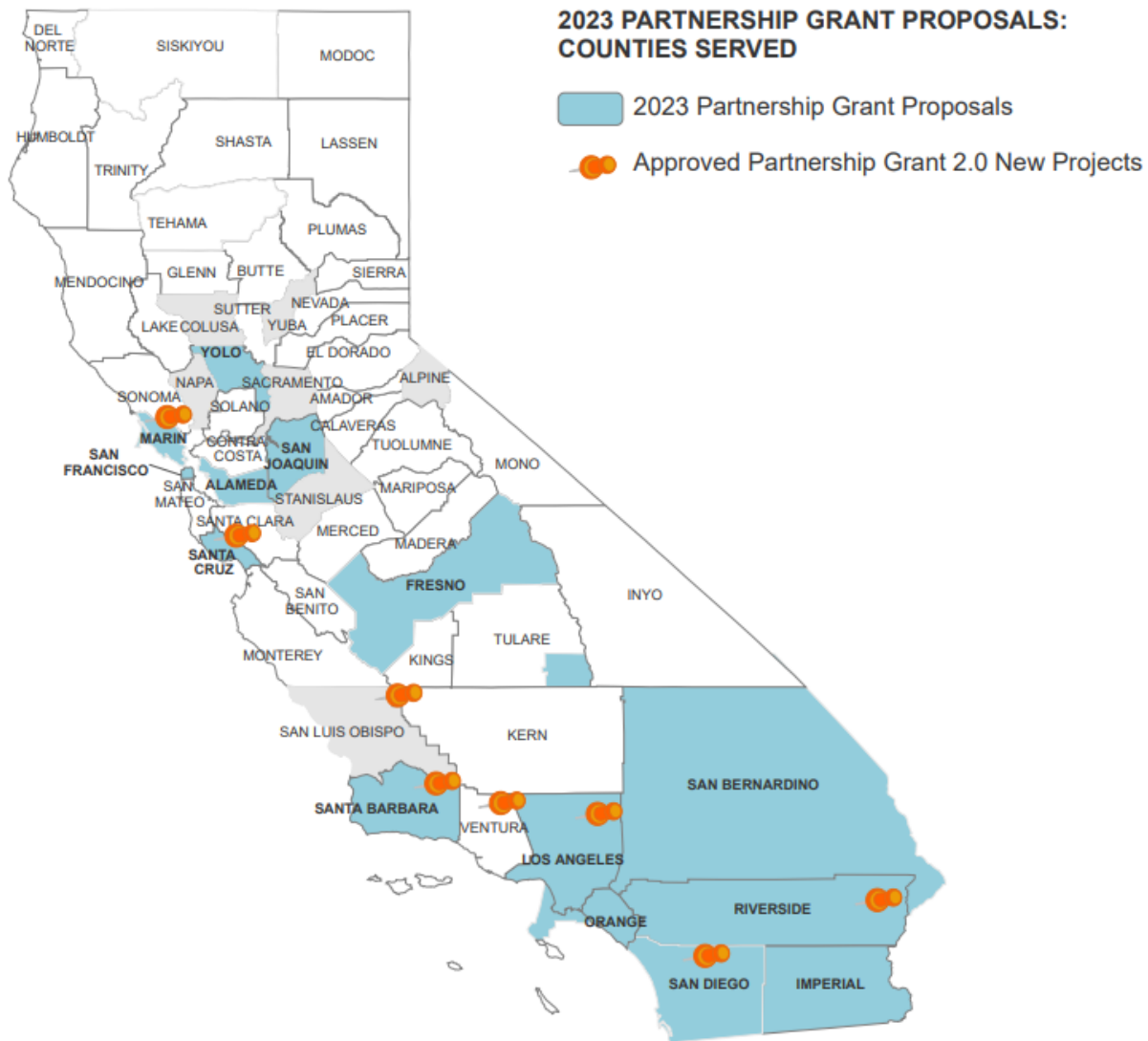
Substantive Areas

The proposed projects would address seven substantive areas, with most projects providing services in family/domestic violence (12), consumer/finance (7), and housing (7). As a point of comparison, the PG 2.0 new projects that were funded address four additional substantive areas – disability rights, education, employment, and health and long-term care.



Counties Served

The 31 projects span 14 counties in California, with the majority of projects serving Los Angeles County (11), followed by Alameda County (5). As an additional consideration, the PG 2.0 new projects are currently serving eight counties.



TENTATIVE FUNDING RECOMMENDATIONS

On May 12, the PG Committee reviewed all final rubric scores and developed tentative funding recommendations. Since the funding pattern for 2022 was anomalous due to an unanticipated increase in EAF funds, and the 2023 amount was unknown at the time, the PG Committee made tentative recommendations based on two different scenarios. Under scenario one, available funds would be approximately \$6.5 million, assuming that the 2023 allocation would be similar to the combined initial 2022 allocation and PG 2.0 allocation. Under scenario two, available

funds would be approximately \$2.6 million if available funding was similar to the initial 2022 allocation.

For scenario one, the PG Committee tentatively recommended fully funding projects that scored at least 60 points. For scenario two, the PG committee first agreed on a tentative funding range of \$25,000 to \$150,000. Considering this range, the committee made the following tentative funding recommendations:

- Projects that scored at least 77 points would be fully funded up to \$150,000
- Projects that scored 70-76 points would be funded at least 85 percent of either their original requested amount or \$150,000 for larger requested amounts
- Projects that scored 60-69 points would be funded at least the bottom range of \$25,000

The PG Committee did not develop tentative funding recommendations for the two lowest scoring proposals, and delegated authority to an ad hoc working group to review these proposals, work with staff to address any substantive concerns, and present its recommendations as to funding at the July 21 PG Committee meeting.

Following the meeting, staff reached out to all applicants to share final rubric scores, tentative funding recommendations, and to follow up on any pending questions from the committee. Applicants were provided an opportunity to provide feedback about the potential impact of the tentative funding amount on their proposed project. There were no follow-up questions from applicants about their rubric scores or the review process. All applicants indicated that they would still be able to operate their projects with potentially decreased Partnership Grant funding, and reductions in deliverables were generally in proportion to the decrease in funding compared to the requested amount.

The working group also met on May 20 and June 7 to discuss proposals submitted by Central California Legal Services (CCLS) and Riverside Legal Aid (RLA). The working group did not have substantive concerns regarding CCLS's proposal and attributed the proposal's low scores to rubric categories that could be easily improved through technical assistance from staff, rather than to categories indicating deficiencies in the project. Staff reached out to CCLS, who was responsive and satisfactorily addressed the working group's concerns. As for RLA, the working group had substantive concerns regarding the proposed project's overall administration, impact, and how anticipated services and budget line items were calculated. Staff reached out to RLA to share these concerns; unfortunately, those concerns were not allayed with RLA's responses. After review and consideration, the working group recommends fully funding CCLS and not funding RLA's respective Partnership Grant proposals.

NEXT STEPS

Following the July 21 meeting, the 2023 final allocation recommendations will be presented to the Legal Services Trust Fund Commission for approval on August 12.

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 2023 Partnership Grant allocation recommendations, as finalized during the Committee's July 21 meeting.

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 2023 Partnership Grant allocation recommendations, as recommended by the Partnership Grants Committee.

ATTACHMENT(S) LIST

- A.** 2023 Partnership Grant RFP Requirements, Priorities, and Policies
- B.** 2023 Partnership Grant Project Profile Sheets
- C.** 2023 Partnership Grant Committee Rubric Scores and Tentative Funding Recommendations (to be completed on July 21)



The State Bar of California

OFFICE OF ACCESS & INCLUSION

THE PARTNERSHIP GRANT REQUEST FOR PROPOSAL: REQUIREMENTS, PRIORITIES, AND POLICIES

This document provides information for organizations interested in submitting proposals for Partnership Grants. Organizations should review this document to ensure that the proposed projects are eligible for this funding, and that their proposals describe those activities in a manner that best addresses the principal concerns of the funding authorities.

Partnership Grants are competitive and discretionary. Project proposals must be submitted on SmartSimple by **5:00 p.m. on Friday, March 18, 2022.**

If you have any questions, please contact Christal Bundang at christal.bundang@calbar.ca.gov.

BACKGROUND

The State Budget Act establishes the Equal Access Fund “to improve equal access and the fair administration of justice.” The Equal Access Fund is allocated to the Judicial Council and administered by the State Bar of California, through its Legal Services Trust Fund Commission (Commission). Ten percent of the Equal Access Fund is reserved for “joint projects of courts and legal services programs to make legal assistance available to pro per litigants.”

Partnership Grants are awarded through a competitive process. The Commission reviews and compares all eligible proposals and makes funding recommendations to the Judicial Council. Grants are awarded for a one-year period commencing January 1. Decisions of the Commission, as approved by the Judicial Council, are final; there is no appeals process. Due to the limited availability of funding, all proposals may not be funded. Historically, projects have been funded in a range from \$20,000 to \$120,000. Grant award allocations also vary based on available funding. For the 2022 grant year, a total of \$2.58 million was awarded to 36 eligible projects.

Partnership Grants are primarily intended to support new projects. Consideration will also be given to ensure that this funding supports projects serving a diverse range of geographic areas, substantive issues, and client constituencies. Projects seeking funding beyond five consecutive years will be more closely reviewed by the Commission in terms of overall project strength and other selection criteria.

At the conclusion of each grant year, Partnership grantees must submit a comprehensive report and evaluation on the use and impact of these funds. Partnership Grant funding is typically awarded for no more than five consecutive years of support, and applicants must describe their plans for obtaining funding from other sources to support these projects after the termination of Partnership Grant support.

2023 PARTNERSHIP GRANTS SCORING RUBRIC

In an effort to provide transparency and equity in the review process, the Committee will use a scoring rubric as a tool to help guide review of all eligible proposals.

The rubric is comprised of four sections - Eligibility Requirements, Selection Criteria, Funding Priorities, and Innovation. Initial rubric scores will be shared with applicants, who will have an opportunity to improve their scores, by providing additional information or addressing initial concerns. For projects applying for continued funding, the Commission may also consider an applicant's past performance when scoring relevant rubric sections such as Project Impact and Evaluation. The Commission maintains discretion when determining funding recommendations.

Eligibility Requirements

This section is not weighted. Applicants must meet the following criteria to be eligible to submit a proposal:

- Qualified Legal Services Projects (QLSPs): Pursuant to Business & Professions Code 6210 et seq., only QLSPs are eligible to apply for Partnership Grants.
- Joint Court/Qualified Legal Services Projects: Proposals must be for projects jointly developed and implemented by California State courts and QLSPs, and, except in rare circumstances, services must be delivered at or near the courthouse.
- Indigent Persons: Use of Partnership Grant funds is restricted to the provision of services to indigent persons as defined under Business and Professions Code §6213(d).
- Self-Represented Civil Litigants: Partnership Grant funding is restricted to providing assistance to individuals who are or expect to be engaged in civil litigation without representation by counsel. These funds cannot be used to make court appearances on behalf of litigants.

If the proposed project will be serving non-indigent persons or if individuals will be engaged in civil litigation, the project must identify non-Partnership Grant funds that will be used to cover this work.

Selection Criteria (80 points)

Based on responses provided in the proposal, the Committee will score each sub-section as "Exceeds Expectations," "Meets Expectations," or "Below Expectations" with corresponding multipliers for a maximum of 80 points.

Generally, responses that provide relevant and detailed information, such as metrics or specific examples would be scored favorably. Responses that do not appear responsive to the selection criteria's description may be considered "below requirements."

Funding Priorities (20 points)

In 2018, the Commission approved the following policy regarding funding priorities:

"Historically, Partnership Grants have been awarded as "seed funding," with an initial expectation of funding reductions after the first three years and termination of funding after the fifth year. This model can sometimes lead to valuable, high functioning projects making major changes to their substantive focus or operational model for the purpose of retaining eligibility for Partnership Grant funding beyond the initial five-year period.

While the Commission continues to prioritize innovative programs, it also seeks to support existing projects that provide valuable services to underserved communities. The following considerations are intended to assist applicants in setting reasonable expectations regarding the expected timeframe for the duration of Partnership Grant support.

Matters to be taken into consideration when determining whether to renew Partnership Grant funding include:

- That Partnership Grants will continue to be awarded with the principal intention of providing seed funding for new projects, which may be renewed annually over an initial five-year period.
- That Partnership Grant funding may or may not be reduced from year to year during that time, taking into account project strength, demonstrated success, and funding availability.
- That the discretionary nature of Partnership Grants, under which the Commission's decisions on continued funding may be contingent upon projects meeting programmatic, administrative, and financial expectations The Commission retains discretion not to renew funding within the initial five-year timeframe should projects be unable to meet basic expectations.
- That funding beyond a fifth-year cycle be considered on a case by case basis. Particular consideration should be given to projects supporting unmet rural needs, program that have evolved to respond to a recent emergency or disaster, and high functioning and heavily utilized projects that have been unable to secure alternate funding despite documented efforts. The foregoing examples are illustrative, not exclusive.
 - Applicants seeking funding beyond a fifth year into a second cycle must demonstrate the effectiveness of the project and provide additional justification such as documentation of their pursuit of alternate funding sources, narratives and quantitative data on local needs or circumstances, and/or additional project

evaluation such as court feedback, case file review or other such evaluative processes.

- Projects seeking funding beyond a fifth year will be reviewed with respect to the factors cited above, as well as in comparison to new and other renewing applicants in the areas of program strength, demonstrated success, and funding availability.”

The Commission will exercise its discretion and score the project 1-5 based on funding priorities. That number will be multiplied by 4 for a maximum section score of 20 points.

Optional – Innovation (up to 10 points)

The Commission encourages innovative projects and may award up to 10 bonus points for innovation.

Examples of innovation may include:

- Projects that involve courts that have not had projects in a long time
- Projects with models that were tried/successful in other jurisdictions, but are new to the court
- Initial projects in a case type (first consumer program, first conservatorship program, etc.)
- Projects testing new ways of providing services.

ELIGIBILITY REQUIREMENTS			
Please select “yes” or “no” for each requirement.			
Applicant is a Qualified Legal Services Project	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
Proposal is jointly developed and implemented by a California State court and services are delivered at or near the courthouse.	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
Proposed services will be provided only to indigent persons, as defined under Business and Profession Code §6213(d).	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
If NO, has the project identified non-Partnership Grant funds that will cover this work?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> N/A
Proposed services will be provided only to self-represented litigants (individuals who are or expect to be engaged in civil litigation without representation by counsel).	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
If NO, has the project identified non-Partnership Grant funds that will cover this work?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> N/A

DEFINITIONS	
Exceeds Expectations	Response is very high quality, addressing all questions in the request for proposal and all elements of the selection criteria. The identified strengths in the category are substantial with no or minimal weaknesses or additional questions identified. Any identified weakness has minimal effect on the overall quality of the response.
Meets Expectations	Response is good, effectively addressing most questions in the request for proposal and the selection criteria. Strengths and weaknesses are

	identified that may balance each other in significance. Overall quality of response is satisfactory
Below Expectations	Response is weak, neglecting to address questions in the request for proposal and the elements of the criteria. The responses Identified weaknesses hold significant weight, overshadowing the identified strengths. Overall quality of response is inadequate, with significant flaws in key elements.

SELECTION CRITERIA (80 PTS)

Checkmark the appropriate ranking for each category, and then multiply by the number below. Add sub-scores from A and B to get the total points for this section.

CATEGORY & DESCRIPTION	Exceeds Expectations	Meets Expectations	Below Expectations
<u>Court Involvement</u> A successful proposal will indicate: <ul style="list-style-type: none"> significant cooperation between the partner court and legal services organization, integration with other court-based services and if the project's services are to be reserved for only one litigant role, such as petitioners but not respondents, that this has been thoroughly explored with the court, and alternate legal resources that can provide meaningful if not equivalent levels of assistance to the opposing parties have been identified. 			
<u>Project Impact</u> A successful proposal will clearly describe the needs of the targeted population and how anticipated outcomes of the proposed activity(ies) will have a meaningful impact on this population. Outcomes may include the number of people served, nature of the impact, and other project deliverables that will be achieved with this grant funding during the grant period.			
A. Number of Check Marks	X20=	X15=	X10=
Subtotal (A)			
<u>Administration</u> A successful proposal will demonstrate the ability and capacity to implement and manage the proposed activity(ies). Strong administration includes adequate staffing, leadership, and oversight of project monitoring, outreach, and resource development. An applicant's historical demonstration of its ability to meet goals from prior grants and timely reporting of results/outcomes will also be considered under this category.			

Partnership Grants: Requirements, Priorities, Policies

Page 6

Project Budget A successful project will clearly reflect how Partnership Grant funds are tied to actual project expenses or directly related costs.			
Continuity Planning A successful proposal will be able to articulate how its proposed services might continue beyond the grant period and comprehensive details on how sustainability might be achieved beyond simply stating a general intent to secure additional funding. This may include Identifying how the proposed project fits within current organizational programming, and whether the project is replicable or scalable			
Evaluation A successful proposal will incorporate meaningful evaluation plans and metrics that effectively demonstrate whether and how the project's planned goals are being achieved. This may include a clear statement of the project goals, strategies to be used to achieve those goals, evaluation methods to be used to make any mid-course adjustments to the delivery model, and evaluation methods to gauge the success of the project. Returning organizations applying for the same funding opportunity will also need to address prior evaluation outcomes and metrics.			
B. Number of Check Marks	X10 =	X6 =	X3 =
Subtotal (B)			
Selection Criteria Total (A+B)			

FUNDING PRIORITIES (20 PTS)

Keeping the funding priorities in mind, determine the number points you wish to score this project and then multiply by the number below.

1. Partnership Grants will be awarded with the principal intention of providing seed funding for <u>new projects</u> and projects in their second to fifth year of funding. 2. Projects requesting funding beyond their fifth year that serve rural areas, are responsive to a recent emergency or disaster, or are high-functioning and heavily utilized projects but have been unable to secure alternate funding despite documented efforts are prioritized. 3. Projects seeking funding beyond a fifth year that are not in these priority areas are considered for funding only after proposed awards have been allocated for all prioritized projects. The State Bar retains discretion to waive this policy.	5 4 3 2 1
Funding Priority Total Score	X4 =

OPTIONAL - INNOVATION (up to 10 PTS) The Committee may exercise discretion in awarding points for innovation. Based on your review of the proposal, determine if wish to score additional points for innovation and provide your reason(s) below.		
Additional points will be awarded to successful proposals that demonstrate innovation.	YES	NO
Bonus Points Awarded (1-10 pts)		
Reason(s) for awarding bonus points for innovation:		

OTHER POLICIES REGARDING ADMINISTRATION OF PARTNERSHIP GRANTS

The Commission has made policy determinations with regard to certain substantive issues that have arisen repeatedly, as guidance for applicants seeking to strengthen their proposals, and to help ensure the consistency of its own deliberations and recommendations regarding Partnership Grants. The following statements of Partnership Grants policies were each approved by the Commission, on the dates indicated in parentheses after their titles:

Self-Representation and Attorney-Client Relationships (July 2017)

Self-represented litigants receiving services under a Partnership Grant are not prohibited from forming a confidential relationship with a lawyer, so long as they remain unrepresented when they appear in court. While we [the Commission] will ultimately defer to the court's own determination as to whether the litigant is self-represented, factors impacting this determination include where any attorney's participation takes place, and whether the attorney's name appears on pleadings or in the records of proceedings in court. So long as no appearance is made on the record and no representational activity occurs in court, formation of an attorney-client relationship in and of itself is not inconsistent with the "self-represented" status of a litigant.

Overhead, Administration, and Audit (August 2018)

Partnership Grant funds should pay for actual project expenses or directly related costs – to fund the project, but not the organization. Some programs have used individual line items to identify administrative costs. Others use an Allocated Cost Ratio, which is often based on a standardized formula; however, it is sometimes unclear how a formula-based allocation relates to the proposed activities.

- Some non-personnel costs which may be appropriately tied to the project include malpractice insurance and attorney licensing fees.
- As Partnership Grant-funded services should typically be performed primarily at or near the courthouse, which reduces the need for program space and equipment, costs allocated to these lines should be clearly justified in the budget narrative.
- Programs using formula-based allocated cost ratios must clearly explain what these comprise and how they are calculated, for purposes of Partnership grant budgeting.

Use of Partnership Funding as a Sub-grant Covering Wages of Court Staff (August 2018)

An organization receiving Partnership Grant funding is expected to be the primary service provider under that grant. However, greater efficiencies can sometimes be attained by sub-granting some of that funding to a court partner. The following considerations have been identified as relevant in determining whether to approve discretionary funding for such a request:

- The contract governing the relationship between the grant recipient organization and the court must clearly specify that grant-funded court staff will only work on project activities, not on other duties that might be assigned by the court.
- The contracted staff must follow the Guidelines for the Operation of Self-Help Centers, with particular regard to ensuring the court's neutrality as to the fact that services are

being provided, the manner in which they are provided, and the persons to whom they are provided.

- The services funded would not otherwise be provided by the court, but for the Partnership Grant. The Partnership Grant shall not supplant existing funding or services.
- The project budget must include additional funding sufficient to assist litigants who do not qualify to be served with Partnership Grant funding.
- In these and all cases, the court must participate in providing feedback and in developing evaluative data. Where funding is sub-granted to the court partner for payment of court staff, this evaluative data will include information on the number of litigants using the service who do not meet the definition of “indigent” found at Business & Professions Code §6213.

Funding of Supervised Settlement Services through Partnership Grants (July 2019)

Partnership Grants may be used to support supervised settlement services to assist litigants in settling their litigation, so long as the settlement services are a component of court-based litigation and are overseen by an attorney.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Bet Tzedek Legal Services			
Project Name	Decedent Estate Self-Help Clinic			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$243,143.00	\$150,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>Grief can be especially complicated for heirs of decedents who were unable to complete an estate plan before their death to probate the estate. Probate is a time-consuming and expensive process, but one that lends itself to a self-help model. In 2022, Bet Tzedek and the Los Angeles Superior Court established the County's only court-based clinic that provides free self-help services to pro per litigants in decedent estate matters. The project will operate remotely from Stanley Mosk Courthouse (hours of operation TBD), with the potential to expand to the Antelope Valley Courthouse in the future.</p> <p>During the grant period, Bet Tzedek will continue to develop clinic procedures, improve court processes, and expand services in line with community need. Bet Tzedek staff attorneys and pro bono volunteers will triage decedent's estate cases for pro per litigants and provide either legal information, self-help assistance, or referrals; help litigants determine if they need a full probate, summary probate procedure, or can use a probate alternative; and provide self-help assistance with out-of-court procedures for small estates and summary court procedures for transferring property. Litigants who need to probate a decedent's estate will be referred to the private bar. Bet Tzedek will also begin developing processes for clearing probate notes for litigants who have filed pro per probate petitions. With the court, the Clinic will continually assess community need for other probate-related procedures and develop practicable self-help services.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Los Angeles Superior Court	Stanley Mosk Courthouse	111 North Hill Street, Los Angeles, CA 90012	Remote, Days/Hours TBD	Remote, Days/Hours TBD

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Directing Attorneys	0.1	0.04
	Staff Attorneys	0.6	0.19
		0	0
	Lawyers Total	0.7	0.23
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other	Project Coordinator	1	1
	Legal Secretary	0.2	0
	Other Total	1.2	1

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	0	0	0
Document Preparation and Review	0	0	0
Filing or Services Assistance	0	0	0
Supervised Settlement Services	0	0	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other			

Community Engagement – Outreach	Bet Tzedek will conduct extensive outreach to communicate the availability of Clinic services to litigants and the community. We will continue to share informational flyers about the Clinic with the courthouse, long-time Bet Tzedek partner organizations (including senior centers and APS), and other legal service providers and courthouses in Southern California. We will also post flyers/information on Bet Tzedek's website and social media and provide the Clinic's information on our intake phone line. In addition, Bet Tzedek will train pro bono attorneys and other Clinic volunteers on issues related to probating a decedent's estate, the Clinic's services, and how to refer clients.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	As a self-help clinic operating within the courthouse, Bet Tzedek has made a commitment to the court to serve all litigants who request assistance so long as the services requested are within its scope of services. Clinic staff will use a subject matter screening tool to determine whether litigants need assistance with a full probate, summary probate procedure, or a probate alternative. Staff will also collect standard intake information, such as demographics and monthly income, which will be used to determine an appropriate funding source, but this data will not impact eligibility for services. The Clinic's primary beneficiaries will be individuals who are seeking self-help assistance to probate small estates because their financial situation or the size of their estate precludes hiring a private attorney, therefore litigants are likely to be indigent.
Alternative Services	For those litigants whose cases are more legally complicated or who are deemed ineligible, meaningful referrals will be made to the Los Angeles County Bar's Legal Referral and Information Service. Referrals will be made by Clinic staff or volunteers at the time of service.
Court's Role	Per the MOU between Bet Tzedek and the Los Angeles Superior Court, the court will make rooms and computers available for self-help litigants at the Stanley Mosk Courthouse. Clinic staff will also solicit court data, if available, to support the project's improvement and efficacy.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Bet Tzedek Legal Services			
Project Name	Remote Pro Se Technology Initiative			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$361,935.00	\$120,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>Bet Tzedek has been implementing the Self-Help Conservatorship Clinic (SHCC) and Elder Abuse Restraining (EARO) clinics virtually since the start of the pandemic. As the remote pro se assistance model has significantly expanded access for everyone, Bet Tzedek is committed to continuing this successful model post-pandemic and to expand its reach and capacity in 2023.</p> <p>With support from a State Bar Partnership grant, Bet Tzedek and the Los Angeles Superior Court (LASC) joined forces to launch the Remote Pro Se Technology Initiative in 2022. In 2023, we will expand and improve upon technology used and services delivered based on evaluation results from 2022. Program components currently include remote SHCC and EARO Clinic services, online video tutorials and modules to complement remote aid, improvement of court technologies that support remote assistance, outreach to publicize remote services, and remote EARO kiosk intake. In 2023, the SHCC and EARO teams will work to expand our reach by focusing on training additional courts, piloting remote EARO kiosk intake at courts beyond Stanley Mosk, and improving piloted technology. This initiative will increase access to justice and provide a model for effective remote services throughout California.</p> <p>The Remote Pro Se Technology Initiative will be staffed by SHCC and EARO Clinic staff. The Pro Se Clinic Coordinator hired in 2022 will continue to bridge both clinics, providing intake and follow-up services. Remote SHCC assistance will be available Monday-Friday from 9:00am-5:00pm. Remote EARO Clinic assistance will be available Monday, Wednesday, and Friday from 9:00am-5:00pm.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Los Angeles Superior Court	Stanley Mosk Courthouse	111 North Hill Street, Los Angeles, CA 90012	Remote	Remote

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Directing Attorneys	0.21	0
	Staff Attorneys	0.8	0
		0	0
	Lawyers Total	1.01	0
Paralegals	Paralegals	0.75	0.15
		0	0
	Paralegals Total	0.75	0.15
Other	Clinic Coordinator	1	1

	Legal Secretary	0.2	0
	Other Total	1.2	1

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		0	0	0
Document Preparation and Review		0	0	0
Filing or Services Assistance		0	0	0
Supervised Settlement Services		0	0	0
Post-hearing Assistance		0	0	0
Other		0	0	0
Explain Other	<p>The long-term goal of the Remote Pro Se Initiative is to create a best practices remote pro se service model that can be replicated throughout California. In 2023, the project goal is to improve and expand the remote model to bridge the digital divide and increase access to justice for litigants seeking elder abuse restraining orders and limited conservatorships in Los Angeles County. We will achieve this goal through the following objectives: Building Remote Clinic Capacity: 1) Providing remote assistance to 150 litigants seeking elder abuse restraining orders. 2) Providing remote assistance to 315 litigants seeking limited conservatorships using Guide and File exclusively. 3) Improving upon the remote EARO Kiosk Intake at Stanley Mosk. 4) Strengthening partnerships with other courts and exploring potential expansion of the Kiosk Intake to Antelope Valley and/or Van Nuys. 5) Modifying current and creating new video tutorials and online modules on conservatorship and remote hearings for pro se litigants to cover more topics and address needs expressed by litigants. 6) Working with Court Technology Staff on Guide and File improvements. 7) Expanding the outreach campaign. 8) Continue improving remote court infrastructure and technology. Evaluating Remote Clinic Effectiveness: 1) Evaluating and assessing the quality and quantity of limited conservatorship and elder abuse restraining orders filed remotely. 2) Using survey data, evaluate and assess litigants' remote service experience. 3) Using usage data from Court Technology Services, evaluate and assess Guide and File user improvements. 4) Using litigant feedback and usage data, evaluate and assess video tutorials.</p>			

Community Engagement – Outreach	The initiative will expand the outreach campaign to publicize the Remote Pro Se Technology Initiative in 2023. Information on remote clinics will continue to be included in the more than 50 presentations members of Bet Tzedek's Elder Law team provide to law enforcement, social service agencies, and community partners annually. Content will continue to be edited for improvements. In addition, information on our remote clinics is posted on our website at www.bettzedek.org and on the California Courts website at www.courts.ca.gov .
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	As a self-help clinic operating in partnership with the court, Bet Tzedek has made a commitment to the court to serve all litigants who request assistance as long as the request is within its scope of services. Clinic staff screen all litigants to determine eligibility for services at the time of intake.

Alternative Services	For those litigants whose cases are more legally complicated, who are deemed ineligible, or who cannot self-represent due to disability, meaningful referrals will be made to Bet Tzedek's in-house Elder Law or Caregiver Program or the Los Angeles County Bar's Legal Referral and Information Service. Referrals will be made by clinic staff or volunteers at the time of service.
Court's Role	<p>The Judicial Council and LASC developed several web-based platforms that facilitate remote access, including Guide and File document preparation software that allows litigants to remotely fill out and file forms, Justice Partner Portal for partner agencies to remotely access court documents, and LACourtConnect for remote hearings. The pandemic created an opportunity to test the capacity of these technologies and even prompted LASC to develop new technologies in response to unmet needs. LACourtConnect, for example, was developed in direct response to the pandemic and fills a tremendous accessibility gap for those unable to travel to court for hearings.</p> <p>The 2023 Remote Pro Se Technology Initiative will refine existing court technologies to continue expanding remote access. Bet Tzedek will work with the court to identify user improvements to Guide and File so litigants can more easily file limited conservatorships. Through this funding, the team will make adjustments to online video tutorials on LACourtConnect based on feedback from pro se litigants to ensure ease of access to remote hearings.</p> <p>In addition, LASC provides kiosks equipped with computer terminals and phones for walk-in litigants to remotely connect with Bet Tzedek attorneys. LASC also provides Justice Corps volunteers to staff kiosks at Stanley Mosk, answer questions, help litigants remotely connect, and print paperwork. This option fills a critical accessibility gap for litigants without computer access or needing space away from an abuser to safely file paperwork. In 2023, Bet Tzedek will strengthen partnerships with additional courts to potentially implement a similar model.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	California Rural Legal Assistance, Inc.			
Project Name	San Joaquin County Housing Helpline Court Clinic Partnership			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$132,000.00	\$132,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No			Pending	
Project Abstract	<p>California Rural Legal Assistance's San Joaquin Housing Helpline provides one-on-one legal advice and/or information to San Joaquin tenants with housing concerns, focusing on housing retention and prevention of homelessness. In addition to individual phone consultations with tenants, Helpline staff offer weekly answer and trial preparation clinics, available to all San Joaquin tenants and landlords. Although most services are delivered virtually through phone and over Zoom, we offer weekly in-person clinics at CRLA's Stockton office located across the street from the court. Helpline staff are available to meet in-person with tenants with disability-based needs to access services. Participants can elect to attend the group answer clinics in-person or via Zoom link.</p> <p>San Joaquin tenants not eligible for CRLA services are given legal information, know your rights (KYR) print and video resources in multiple languages, referrals, and access to our weekly clinics. Landlords are offered information, KYR resources, access to our clinics, and referral back to the San Joaquin Court Self-Help Center and the San Joaquin Bar Association Lawyer Referral Service for additional assistance. Providing services via phone and Zoom provides greater access to clients with disabilities, health concerns during COVID-19 and beyond, and transportation barriers to accessing services located in a brick-and-mortar office or courthouse. The CRLA San Joaquin Housing Helpline will be open Monday, Wednesday, and Fridays from 9:00 am to 12:00 pm and 1:00 pm to 4:00 p.m. Answer and trial preparation clinics will be held once a week.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
San Joaquin County Superior Court	800 Number Helpline	180 E. Weber Ave., Stockton	MWF, 9:00 – 12:00 and 1:00 – 4:00	18 hours

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Housing Helpline Law Graduate	1	1
	Housing Helpline Senior Counsel	0.06	0.06
	Tenant Justice Project Director	0.05	0.05
	Lawyers Total	1.11	1.11
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other	Legal Secretary	0.05	0.05
		0	0
	Other Total	0.05	0.05

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		300	144	216
Document Preparation and Review		300	144	216
Filing or Services Assistance		100	96	144
Supervised Settlement Services		100	0	0
Post-hearing Assistance		0	0	0
Other		50	0	0
Explain Other	<p>The default judgment rate in San Joaquin County is very high at 42%. Many of the tenants who defaulted likely had defenses to the unlawful detainer filed against them, but simply failed to respond due to ignorance, mistakes, or just feeling overwhelmed regarding how to respond. Post-COVID UD complaints are complex and often contain fifty pages of documents, including the various civil coversheets and attachments. Our experience is that receipt of the UD paperwork causes paralysis in many tenants. Furthermore, the UD answer form has grown from two pages to five pages with inclusion of COVID defenses. In addition to a much more complicated Answer form, the litigant has to fill out two fee waiver forms, optional COVID-declaration forms, and the proof of service. The Answer form's checklist of available defenses is confusing to advocates, and even more confusing to self-represented litigants. As shown by the high default rate, many tenants give up. The Helpline hopes to significantly decrease the default rate by providing tenants sufficient information and assistance to timely file answers and then determine whether they should go to trial, negotiate for a moveout date, or take other action.</p>			
Community Engagement – Outreach		Court staff currently distribute a flyer to self-represented litigants advertising the services provided by CRLA's Law Graduate and the weekly workshops. By 2023, we hope to have the Court's agreement to post our 800 number on the Court's website. Court personnel are currently considering that proposal.		
Attorney-Client Relationship		Yes		

Conflict of Interest Protocols	<p>All San Joaquin Housing Helpline callers will complete an intake over the telephone. CRLA uses a web-based case management system to screen for indigency and residency to determine eligibility for legal services to be provided on a one-on-one basis through the Helpline (or in-person to address disability or technology barriers). As part of that intake process, demographic, income, asset, and immigration status information are entered into the case management system. That process also requires intake staff to obtain information about the adverse party and will determine whether there is a conflict prior to providing legal assistance.</p> <p>CRLA staff working on the Helpline will only provide legal advice to tenants who meet Legal Services Corporation eligibility criteria of indigency and residency. Tenants who do not meet eligibility criteria and landlords will be advised that CRLA will provide legal information, referrals to community partners, and invitation to attend our group clinics. Any tenants who have been identified in our case management system as having a conflict with another current or past CRLA clients, as well as landlords who need more assistance than general legal information and referrals, will be referred back to the San Joaquin Superior Court Self-Help Center with direction to notify Self-Help Center staff that CRLA was unable to provide one-on-one assistance. All callers will be invited to the appropriate live answer and trial preparation clinics and be provided with links to CRLA's library of KYR videos and printed materials.</p>
Income Eligibility Guidelines	<p>CRLA uses its existing eligibility criteria to determine eligibility for one-on-one legal services. All callers are eligible for legal information, referrals, and able to attend our answer and trial preparation clinics and receive links to our library of self-help KYR videos and printed materials.</p> <p>CRLA uses its existing case management system to screen for eligibility and track the demographics of callers to the San Joaquin Housing Helpline. In order to be eligible for one-on-one legal advice, the caller's household income must be below 200% of the federal poverty guidelines, the household's assets total (excluding their home, vehicles, work equipment, and retirement accounts) must fall below a maximum threshold, and the caller must generally be a U.S. Citizen, legal permanent resident, or have other specific immigration status allowed by the Legal Services Corporation.</p> <p>As described in more detail below, the caller must also be a tenant. Landlords and tenants who do not meet the above eligibility factors will be advised that CRLA can provide legal information, referrals, and access to the clinics and KYR materials and will be referred back to the Self-Help Center.</p>

<p>Alternative Services</p>	<p>All self-represented litigants will be eligible and invited to attend CRLA's weekly live clinics. Everyone with email or a texting-enabled phone number will be provided links via email or text to CRLA's on-demand clinics and robust library of Know Your Rights videos. In order to serve as many self-represented litigants as possible, CRLA has created new videos on a wide variety of housing topics and will continue to create and update this library during the grant period. CRLA is in the process of adapting existing hard copy housing informational materials to more accessible, short videos.</p> <p>CRLA will also refer all litigants who are not eligible for CRLA one-on-one legal advice to the Court Self-Help Center and to the San Joaquin Bar Association Lawyer Referral Service. The Self-Help Center can provide additional legal information and direction. The San Joaquin Lawyer Referral Service can mirror the services provided by CRLA Helpline staff by providing a low-to-no-cost avenue for legal advice to self-represented litigants not eligible for CRLA's one-on-one advice. Through the local lawyer referral service, ineligible self-represented litigants may be able to receive free advice in subject areas that may have a personal injury component. Those with no personal injury component will be matched to a prescreened attorney for a \$40 consultation fee.</p>
<p>Court's Role</p>	<p>As the San Joaquin Housing Helpline provides a majority of services virtually, there is generally no need to use court space. However, because Court Self-Help staff believe some individuals may prefer in-person assistance, we are exploring a once-a-week in-person component to the project. Printed materials on the availability of the San Joaquin Housing Helpline are distributed by Court staff to self-represented litigants with housing issues.</p> <p>Although the 800 number and live Q&A totals 86 hours/month, the Law Graduate works full-time assisting San Joaquin callers. When not staffing the 800 number or doing live clinic Q&A, the Law Graduate spends time researching and drafting documents for eligible callers and creating and updating KYR materials. For example, the Law Graduate may do an hour-long intake, but then spend 1-3 additional hours researching the indigent individual's issues or drafting the pro per answer and fee waivers or a demand letter requesting a reasonable accommodation for the caller's disability. This adds an additional 64 hours per month. Furthermore, CRLA's Tenant Justice Project will supervise the Law Graduate, which requires approximately 15 hours per month.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Central California Legal Services			
Project Name	Guardianship Project			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$78,886.00	\$70,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No			Pending	
Project Abstract	<p>This project enjoys a successful record of assisting eligible self-represented litigants obtain guardianships for minor children, many placed with family or referred by Child Protective Services. COVID closures disrupted services during 2021; both parties anticipate that, by mid-2022, the project will again be fully operational. Staff members from the Fresno Superior Court Probate Division, the Fresno County Law Library, and CCLS will participate in twice-monthly workshops presented on first and third Friday mornings; however, as the format of the workshops remains fluid due to COVID-19 restrictions, the Court cannot commit at this time to in-person workshops.</p> <p>During the workshops, the forms are explained to participants as they follow along on their own forms, filling in the required information and/or taking notes to complete the forms at a later time. This allows the presentations to proceed within the workshop's timeframe, leaving sufficient time to respond to questions litigants may have. Once the forms are completed, litigants may contact CCLS and/or Probate Court staff for final review prior to submitting the forms to the Court for filing. This further ensures the forms are properly completed. The project serves all parties; however, those opposing a guardianship rarely attend or inquire about services.</p> <p>The Court supports the partnership and values the direct benefit provided for those navigating the guardianship process. Participants accurately complete and timely file their documents, saving money and frustration.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Fresno Superior Court	B.F. Sisk Courthouse	1130 "O" Street, Fresno, CA 93721	1st/3rd Fridays, 8:30am to 12:30pm	8hrs. workshops only

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Supervising Attorney	0.06	0.03
		0	0
		0	0
	Lawyers Total	0.06	0.03
Paralegals	Paralegal	0.5	0.5
		0	0
	Paralegals Total	0.5	0.5
Other		0	0
		0	0

	Other Total	0	0
--	--------------------	---	---

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		58	0	0
Document Preparation and Review		58	0	0
Filing or Services Assistance		58	0	0
Supervised Settlement Services		58	0	0
Post-hearing Assistance		0	0	0
Other		0	0	0
Explain Other	At this time, there are no other additional goals. Staff is eager to establish the virtual workshops by mid-June and have been working on a PowerPoint presentation and all other materials to be shared with the participants.			

Community Engagement – Outreach	<p>In-person outreach and community education services were suspended due to COVID and will resume once the office re-opens to the public. Staff will distribute informational flyers promoting the virtual workshops throughout the community and post the information at the CCLS website. Information on services is also posted to Facebook and through electronic newsletters sent to over 800 individuals.</p> <p>The support from the Law Library and the Court is important in directing petitioners and opponents to the project. Fresno County residents, who contact the CCLS Legal Advice Line (LAL), are referred to the guardianship workshops. Other referrals come from law enforcement, Child Protective Services, (CPS), Juvenile Court, Fresno County Victims' Services, Central Valley Regional Center (CVRC), foster family agencies, and foster parents' support groups.</p> <p>Other CCLS staff conduct year-round outreach activities and distribute informational materials on the Guardianship project at various sites such as health fairs, cultural events and community forums, once such efforts resume.</p>
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	<p>Each self-represented litigant is required to complete the eligibility screening form used to determine income eligibility (200% FPL) for the project's services. Litigants must list all sources of monthly income for each household member. Everyone who qualifies for services is also eligible to obtain a fee waiver, which is signed under the penalty of perjury. Additionally, each matter is reviewed for subject matter eligibility, and only those whose income and subject matter fall within the project's scope can receive assistance from the staff members.</p>

<p>Alternative Services</p>	<p>Those determined not eligible for the project's services are referred to the Fresno County Public Law Library, the Court's Probate Division staff, and the Fresno County Bar Association's Attorney Referral Service. They are also provided information regarding the available on-line resources.</p> <p>The Probate Examiners are available to assist those have who attended the workshops but who do not qualify for the project services. Other community providers include the United Way's 211 Referral Line, which provides information regarding relevant community resources, including cash assistance, public benefits, etc.</p> <p>Litigants seeking assistance in an area of law beyond the scope of the project's services, including minors under the jurisdiction of the Juvenile Court, are deemed ineligible to participate in the project.</p>
<p>Court's Role</p>	<p>Statement From the Fresno Superior Court: Moving forward, the Court will be functioning under a new "normal" and does not anticipate returning 100 percent to operations as they were pre-COVID. They hope to begin a phased reopening of the physical courthouses sometime later in 2022.</p> <p>All services are currently being provided remotely, with the exception of certain criminal matters. Most Court staff members are currently working onsite, and our collaborative relationships are all currently being conducted through the use of virtual platforms.</p> <p>The Court is willing to continue to work collaboratively with CCLS on the Guardianship program in providing services to unrepresented members of the public, although those services may vary due to COVID and any future operational changes at the Court. In addition, the Court is willing to continue to share the same types of data that have been shared in the past, as long as the Court continues to track the specific data types in question.</p> <p>At this time, the Court is not in a position to expand our collaborative relationship with CCLS; however, if CCLS has ideas or proposals they would like to make to the Court, we are open to reviewing and considering the information.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Community Legal Aid SoCal		
Project Name	Compton Self-Help Economic Expansion Project Year 2		
Grant Year	Total Budget	Amount Requested	Amount Awarded
2023	\$132,798.00	\$91,000	
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse
No			
Project Abstract	<p>The Compton Self-Help Center Economic Expansion Project (EEP) expands capacity for consumer debt issues and small claims issues at the Compton Superior Courthouse Self-Help Center (SHC). As COVID-19 protections expire, we are seeing an increased number of requests concerning these economic issues.</p> <p>The EEP seeks to help the Court weather the crisis by educating self-represented litigants about the small claims and consumer debt processes. It is a critical service for the Compton Courthouse, which serves communities that are home to significant economic and health disparities that have been worsened by COVID. As a result, there is a need for local capacity to help self-represented litigants who must engage with the civil legal system through collections and small claims cases.</p> <p>With a 1.0 FTE Attorney, this project allows Legal Aid staff to provide one-on-one information to and/or provide educational workshops to self-represented litigants who are at the Compton Courthouse or who are being helped remotely. Primary goals are to help litigants understand the legal process, and correctly complete documents. Litigants who would benefit from additional services, would be referred to a regional legal aid organization based on their zip code and/or referred to the County of Los Angeles' Department of Consumer and Business Affairs (DCBA).</p>		

Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Los Angeles County Superior Court	Compton Courthouse	200 W. Compton Blvd., Compton, CA 90220	Mondays-Thursdays 8:30am-12pm, 1:30pm-4:30pm; Friday 8:30am-12pm	125

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Staff Attorney	0.95	0.95
	Supervising Attorney	0.21	0
	Directing Attorney	0.01	0
	Lawyers Total	1.17	0.95
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other	Grants Manager	0.01	0
	Grants and Comms Coordinator	0.01	0
	Other Total	0.02	0

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	400	197	500
Document Preparation and Review	400	197	500
Filing or Services Assistance	250	197	250
Supervised Settlement Services	200	197	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other			

Community Engagement – Outreach	<p>Court referrals are by far the most common type of referral for pro per litigants to the Compton SHC. CLA SoCal will work with Self-Help managers and Courthouse staff to ensure that Court staff know about the new project and who can be helped by it. Prior to implementation of the workshops, CLA SoCal will also work with Court managers to list the workshops on the LA Superior Court/Compton Courthouse websites.</p> <p>Additionally, CLA SoCal will coordinate with Court staff to advertise the project through social media and will refer individuals from our intake process to the service.</p>
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	<p>This project will assist pro per individuals, including those who qualify as indigent, as defined under Business and Professions Code section 6213(d): “‘Indigent person’ means a person whose income is (1) 200 percent or less of the current poverty threshold established by the United States Office of Management and Budget, or (2) who is eligible for Supplemental Security Income or free services under the Older Americans Act or Developmentally Disabled Assistance Act. CLA SoCal’s Self-Help staff utilize a detailed intake form to gather demographic data, including income, from its customers. It will use this data to screen for eligibility.</p>
Alternative Services	<p>In keeping with the Court’s requirement to remain neutral, the workshop will provide legal information to all pro per litigants regardless of income earned. Equal Access Fund Partnership monies will be utilized for indigent individuals. Pro per litigants who do not meet the State Bar’s income eligibility guidelines may be supported by funding provided by the Legal Services Corporation (LSC). Additionally, referrals will be provided to other Los Angeles County-based legal services programs for those who require extended legal services beyond the capacity of CLA SoCal at the workshop, including regional legal aid organizations, the LA County Small Claims Advisor and the mediation program at the LA Department of Consumer and Business Affairs (DCBA).</p>

Court's Role	<p>This project will be based at the Self-Help Center at the Compton Superior Courthouse. The site includes space, internet connection, computers for self-represented litigants, security, and publicity on the LA Superior Courts' website. The Los Angeles Superior Court completed a renovation of the Self-Help Center in 2022 that includes additional technology for litigants to use.</p> <p>In 2022, CLA SoCal is utilizing a hybrid approach utilizing in-person and remote services for EEP. We hope to continue this model, and in 2022 we will work with the Court to evaluate the success of the hybrid model to determine if it should be continued in the future.</p>
---------------------	---

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Community Legal Aid SoCal			
Project Name	Norwalk Consumer Debt Series			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$43,516.00	\$34,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No			Pending	
Project Abstract	<p>Community Legal Aid SoCal seeks to expand a consumer debt workshop at the Norwalk Courthouse to provide litigants with help through the life cycle of a debt case; this popular workshop ended in 2020. The objective of this program is to make the debt collection legal process more accessible and understandable to pro per litigants and guide them through this process no matter the stage they seek assistance.</p> <p>The project assists pro per litigants from the earliest stage of a debt collection matter (such as the receipt of a letter demanding payment on a defaulted debt) to those who have been served with a collection lawsuit and those preparing for trial. The project is also useful for litigants who are subject to collection/enforcement activities following entry of a debt collection judgment.</p> <p>Following conversations with Court staff, CLA SoCal seeks to expand this project into a four-workshop series that will walk litigants through the full litigation cycle: Overview & Answer, Discovery, Settlement/Motions/Evidence/Getting Ready for Trial, and Post-Judgment Actions.</p> <p>The project will be staffed by an attorney and a bilingual paralegal. While the project is open to both debtors and creditors, it is designed to help low-income litigants who are opposed by a party represented by counsel. In this way, the Consumer Debt Project increases the community's access to the justice system and will help bridge the gap of unmet needs of low-income individuals and families. All services are free.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Los Angeles County Superior Court	Norwalk Courthouse	12720 Norwalk Blvd., Norwalk, CA 90650	1st, 2nd, 3rd, 4th Tuesdays of each month, 9-12	12

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Directors	0.02	0.01
	Supervising Attorney	0.03	0
	Staff Attorney	0.14	0.14
	Lawyers Total	0.19	0.15
Paralegals	Paralegal	0.16	0.16
		0	0
	Paralegals Total	0.16	0.16
Other	Grants Manager	0.01	0

		0	0
	Other Total	0.01	0

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	0	45	180
Document Preparation and Review	0	45	180
Filing or Services Assistance	0	45	125
Supervised Settlement Services	0	0	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other			

Community Engagement – Outreach	Information concerning the debt collection workshop will be available on the Los Angeles County Superior Court's Self-Help website; staff at the Court Clerk office will also refer litigants to the Workshop with a Court-produced flier for the workshop. Information on the Debt Collection workshop will also be available on CLA SoCal's website, and we will continue to use our social media channels to help advertise our State Bar Partnership workshops.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	This project will assist pro per individuals, including those who qualify as indigent, as defined under Business and Professions Code section 6213(d): ““Indigent person” means a person whose income is (1) 200 percent or less of the current poverty threshold established by the United States Office of Management and Budget, or (2) who is eligible for Supplemental Security Income or free services under the Older Americans Act or Developmentally Disabled Assistance Act. Eligibility will be determined through answers provided by litigants on a form at the beginning of the workshop.
Alternative Services	In keeping with the Court's requirement to remain neutral, the workshop will provide legal information to all pro per litigants regardless of income earned. Equal Access Funds will be utilized for indigent individuals. Pro per litigants who do not meet the State Bar's income eligibility guidelines may be supported by funding provided by the Legal Services Corporation (LSC).

Court's Role	<p>CLA SoCal's Partnership grant for the consumer debt workshop ended at the Norwalk Courthouse in 2020, but through carryover, CLA SoCal continued remote workshops in 2021.</p> <p>We anticipate that operations will resume at the Norwalk Superior Courthouse in 2022, and that in-person debt workshops could resume in 2023. The Court will provide workshop space four times per month, with two in-person workshops two workshops available remotely over litigants' personal devices; in order to help litigants who do not have personal devices, paralegal students and/or law students will be at the Courthouse during workshops so that litigants can access the workshops using computers in the workshop room.</p> <p>CLA SoCal will also coordinate with its proposed Orange County-based consumer debt project to reduce duplication of services; we intend for staff in this project to collaborate with Orange County staff and staff at Public Law Center to develop a new "Preparing for Trial/Evidence/Settlement" workshop that can be presented through partnerships with both courts.</p>
---------------------	---

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Community Legal Aid SoCal			
Project Name	Orange County Consumer Debt Series			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$75,000.00	\$69,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>Community Legal Aid SoCal and Public Law Center (PLC) propose to expand on a consumer debt workshop that began in 2019. The objective of this program is to make the debt collection legal process more accessible and understandable to pro per litigants and guide them through this process no matter the stage they seek assistance. All services are free, and partners intend to hold workshops at PLC's space across from Central Justice Center in Santa Ana.</p> <p>The project assists pro per litigants from the earliest stage of a debt collection matter (such as the receipt of a letter demanding payment on a defaulted debt) to those who have been served with a collection lawsuit and those preparing for trial. The project is also useful for litigants who are subject to collection/enforcement activities following entry of a debt collection judgment.</p> <p>This project will be a four-workshop monthly series that walks litigants through the full litigation cycle: Overview & Answer (twice monthly), Discovery & Motions, and Settlement/Evidence/Getting Ready for Trial. The project will also allow for collaboration on a series of Debt videos for litigant education.</p> <p>The project will be staffed by an attorney and paralegal. While the project is open to both debtors and creditors, it is designed to help low-income litigants who are opposed by a party represented by counsel. In this way, the Consumer Debt Project increases the community's access to the justice system and will help bridge the gap of unmet needs of low-income individuals and families.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Orange County Superior Court	Across street from Central Justice Center	601 W. Civic Center Drive, Santa Ana, CA 92701	1st, 2nd, 3rd, and 4th Wednesdays of month, 9-12	12

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Directors	0.02	0.01
	Supervising Attorney	0.03	0.03
	Staff Attorney	0.28	0.28
	Lawyers Total	0.33	0.32
Paralegals	Paralegal	0.26	0.26
		0	0
	Paralegals Total	0.26	0.26
Other	Grants Manager	0.01	0

		0	0
	Other Total	0.01	0

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		0	45	225
Document Preparation and Review		0	45	225
Filing or Services Assistance		0	45	100
Supervised Settlement Services		0	0	0
Post-hearing Assistance		0	0	0
Other		0	0	0
Explain Other	CLA SoCal and PLC seek to collaboratively develop 3-5 short debt videos to complement existing videos to better help self-represented litigants understand the terminology and process involved in debt cases. CLA SoCal and PLC will work with the Court Self-Help team to develop the copy for the content, which will then be developed into animated videos. NOTE: CLA SoCal defines "clinic" as an event where an attorney-client relationship is formed. "Workshops" provide information only.			

Community Engagement – Outreach	Information concerning the debt collection workshop will be available on the Orange County Superior Court's Self-Help website; staff at the Court's Self-Help Centers will also refer litigants to the Workshop with a Court-produced flier for the workshop. CLA SoCal is working with Court Self-Help staff to see if fliers can be placed in courtrooms where debt cases are held. Information on the Debt Collection workshop will also be available on CLA SoCal's and PLC's websites, and we will continue to use our social media channels to help advertise our State Bar Partnership workshops.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	This project will assist pro per individuals, including those who qualify as indigent, as defined under Business and Professions Code section 6213(d): "Indigent person" means a person whose income is (1) 200 percent or less of the current poverty threshold established by the United States Office of Management and Budget, or (2) who is eligible for Supplemental Security Income or free services under the Older Americans Act or Developmentally Disabled Assistance Act. Eligibility will be determined through answers provided by litigants on an intake form prior to the workshop.
Alternative Services	In keeping with the Court's requirement to remain neutral, the workshop will provide legal information to all pro per litigants regardless of income earned. Equal Access Funds will be utilized for individuals whose income is 200% or below the federal poverty level. Pro per litigants who do not meet the State Bar's income eligibility guidelines may be supported by funding provided by the Legal Services Corporation (LSC) for CLA SoCal and private funding for PLC.

Court's Role	<p>CLA SoCal anticipates that we will return to in-person workshops in 2022. We are working with the Court to incorporate a hybrid model that will allow for both in-person attendance and remote participation to increase the potential for participation by the public.</p> <p>Partners will host four in-person workshops per month at space to be leased by PLC across the street from the Central Justice Center (CJC) in Santa Ana. The CJC is the hub for all consumer debt filings in Orange County, however, due to renovations slated to start in 2022, the Courthouse will not be able to host workshops in the coming years. PLC's site is an excellent compromise, as it promises proximity to Court filing windows and courtrooms. CLA SoCal and PLC staff will also utilize Zoom for these workshops, so that remote litigants can participate; the Self-Help Manager is investigating if satellite courthouses can be used to broadcast these Zoom workshops.</p> <p>For the video production, CLA SoCal and PLC staff will work closely with Court Self-Help staff to script and revise copy for debt videos. Once the scripting process is finalized, the Court's multimedia designer will animate the videos, and the Court will post the videos on its website.</p>
---------------------	--

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Elder Law & Advocacy			
Project Name	Imperial County Elder Abuse Technology Project			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$105,000.00	\$105,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No			Pending	
Project Abstract	<p>The Imperial County Elder Abuse Technology Project is intended to serve older adult and low-income self-represented litigants, including those who are limited or non-English speakers, and offer services at the central Imperial County Superior Court. The goal for each participant is that they will be able to gain legal information regarding Elder Abuse Restraining Orders, if a Restraining Order is appropriate for their situation, and successfully complete the necessary paperwork to submit a request and/or answer.</p> <p>The project will be comprised of two fully accessible kiosks located within the Imperial County Courthouse, along with an available attorney and an assistant to guide participants in the process. The kiosk will guide eligible participants through the process of a restraining order in a step-by-step manner in order to facilitate accurate completion of the required forms.</p> <p>Elder Law & Advocacy (EL&A) will work to serve residents of this geographically large, diverse, and underserved county. Meetings between EL&A and the Court will consist of in-depth discussions of matters concerning ongoing clinic operations and will result in changes where indicated.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Imperial County Superior Court	EI Centro	939 Main Street, EI Centro, CA 92243	T: 9:00 - 12:00; W: 1:00 - 4:00	12-24

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Staff Attorney	0.3	0.3
	Executive Director/Supervising Attorney	0.06	0.06
	Legal Services Program Manager	0.03	0.03
	Lawyers Total	0.39	0.39
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other	Program Assistant	0.2	0.2
		0	0
	Other Total	0.2	0.2

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		195	12	60
Document Preparation and Review		195	12	60
Filing or Services Assistance		90	0	0
Supervised Settlement Services		20	0	0
Post-hearing Assistance		0	0	0
Other		30	12	0
Explain Other	Our intention is to create technology that will provide increasing functionality over time. Once this platform is running well, we will be expanding its use and utility.			

Community Engagement – Outreach	<p>EL&A will continue to participate in virtual and in-person community education and outreach events as part of their legal services programs and will offer information about the clinic through those events. The Imperial County Superior Court's Access Center will have information available about project services, as will the civil court clerks, and both will act as referral sources. Project partners will work together to prepare and disseminate outreach materials during the year.</p> <p>EL&A will contact government agencies and community service providers in the region to inform them about project services which are available to their clients, and to request that they assist in publicizing the availability of project services. Court personnel will be aware of clinic services and can give details to self-represented litigants about how and when the project operates. As a project partner, it is anticipated that they will direct potential clients to the project. Materials will be updated to reflect changes in the law and to address repetitive issues raised by project participants.</p>
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	<p>Participants must be residents of Imperial County and have a current or potential elder abuse matter. They must be willing to sign the project's disclosures and conditions notice document which will include items such as project limitations, time constraints for elder abuse actions, and no attorney-client relationships are formed.</p> <p>Potential participants are required to fill in a detailed intake form when they arrive at a kiosk. Kiosk or staff review the form to determine whether the person qualifies for services and whether their matter is suitable for clinic assistance. If they do not qualify, they are given resources, and if appropriate, referrals that pertain to their particular circumstances.</p>
Alternative Services	Ineligible self-represented litigants will be offered clinic resource materials, including citations to online resources, may also be directed to the law library located within the courthouse and may be given information to contact lawyer referral service organizations or other community organizations.

Court's Role	<p>EL&A has maintained a collaboration with the Imperial County Superior Court at the El Centro courthouse location since 2009, with the establishment of the Partnership Grant-supported conservatorship/guardianship clinic. The Imperial County Superior Court has agreed to provide space and infrastructure required for the kiosk within the courthouse, participate in ongoing partnership clinic meetings, and refer clients for project services. The courthouse itself is readily accessible by public transportation, is wheelchair accessible and nearby parking is free.</p> <p>Initially, the kiosks will likely be located within EL&A's office, in order to carefully monitor participation. If the project is successful, it is our intention to transition a kiosk, or implement additional kiosks, to areas of the court accessible even when EL&A staff is not fully available.</p>
---------------------	---

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Family Violence Law Center			
Project Name	Domestic Violence Pro Per (DVPP) Project			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$687,572.00	\$25,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>The Domestic Violence Pro Per (DVPP) Project is a collaborative project of Family Violence Law Center (FVLC), Legal Access Alameda (LAA, formerly Volunteer Legal Services Corporation of the Alameda County Bar Association (VLSC)), and the Self-Help Center of the Superior Court of California, County of Alameda (SHC). The DVPP project increases access to legal services for pro per litigants in South Alameda County by serving self-represented litigants from across South Alameda County in Domestic Violence Prevention Act restraining orders via services offered at the Hayward Hall of Justice and/or virtually via Zoom, reaching more litigants in 2021 than in any prior year. Project partners will meet the needs of self-represented litigants, including those with limited English proficiency, in domestic violence and family law matters by implementing the following objectives: 1) FVLC, LAA and SHC will hold a joint weekly Domestic Violence Petitioner Clinic for DVPA petitioners at the Hayward Hall of Justice (or virtually if required for public health reasons or by court closures), staffed by a FVLC attorney, FVLC pro bono attorneys and law clerks, SHC staff and volunteers, and/or LAA pro bono attorneys; 2) SHC will provide assistance to both DVPA respondents and petitioners, and LAA will provide assistance through an existing LAA family law clinic; and 3) LAA and FVLC will continue to accept referrals from SHC and the clinics for legal representation as resources allow.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Alameda County Superior Court	Hayward Hall of Justice	24405 Amador St, Hayward, CA 94544/Virtual as Required by Court Closures	Tuesdays, 9:30-1:30	20

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Executive Director	0.36	0.01
	Managing Attorney	1	0.08
	Staff Attorney	1	0.12
	Lawyers Total	2.36	0.21
Paralegals	0	0	0
	0	0	0
	Paralegals Total	0	0
Other	Finance Director	0.26	0.02
	0	0	0
	Other Total	0.26	0.02

Goals and Objectives	
-----------------------------	--

	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	75	50	75
Document Preparation and Review	75	50	75
Filing or Services Assistance	75	50	75
Supervised Settlement Services	0	0	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other			N/A

Community Engagement – Outreach	The DVPP clinic will be advertised via vigorous outreach to the community. Participants will be referred to the clinic by SHC in Hayward, by FVLC (which operates a 24-hour crisis line and conducts legal screenings for any victim in Alameda County), by the family law bench and court staff, and by LAA, which also serves Alameda County and conducts intake and referral through the Lawyer Referral Service, via tools such as their newsletter's "Opportunities" section. The clinic will continue to be publicized to other county agencies who serve DVPA petitioners, including the Alameda County Family Justice Center (currently located in Oakland, with a South County location anticipated), Bay Area Legal Aid, Asian Pacific Islander Legal Outreach, Centro Legal de la Raza, and the county's domestic violence shelters.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	When FVLC and LAA conduct legal screenings, they obtain information about family size, financial background, and domestic violence history, and they use this information to determine financial and subject matter eligibility for appropriate assistance through each agency's clinics. FVLC has a well-established legal screening process where relevant information is gathered by trained staff in order to assess eligibility for services, wherein staff obtains information about family size, financial background - including the source of income (i.e., financial dependence on abuser) and eligibility for CalWORKs, and domestic violence history. This information is used by FVLC's Managing Attorney to determine eligibility for appropriate assistance based on specific grant parameters, and applicable grants are earmarked for each client served by FVLC at the time the intake is assigned to legal staff.

<p>Alternative Services</p>	<p>Project partners FVLC and LAA have well-established legal screening processes and already interact with individuals seeking DVPA orders or responding to DVPA petitions. As indicated, when FVLC and LAA conduct legal screenings, they obtain information about family size, financial background, and domestic violence history, and use this information to determine financial and subject matter eligibility for appropriate assistance through each agency's clinics. All project partners will have informational materials available for any participant, both petitioners and respondents, and will provide meaningful referrals to relevant projects for assistance. In addition, all project partners will have complete lists of referrals for other legal services, either for litigants with subject matter ineligibility or for services outside the county, if the litigant must file his or her case elsewhere. In 2021, litigants were referred to: FVLC (for crisis support, therapy, housing or additional legal services or representation), project partners SHC and LAA, East Bay Community Law Center, Centro Legal de la Raza, the Department of Child Support Services, Legal Assistance for Seniors, Family Violence Appellate Project, Bay Area Legal Aid, or sliding scale/private attorneys, depending on the individual circumstance of each case. Also in 2021, 21 litigants were referred to FVLC for legal representation (funded through multiple other sources, not through Partnership funds).</p>
<p>Court's Role</p>	<p>While FVLC and LAA will primarily provide staffing for the DVPP Project, the court will offer physical space for provision of services once the Hayward Hall of Justice reopens for in-person services. Until that time, all clinics will be offered virtually via Zoom, which has positively impacted our capacity, allowing us to serve 171 petitioners in 2022 – the most of any year to date. The Hayward Hall of Justice houses project partner SHC, who provides paperwork preparation assistance to respondents in DVPA matters; these services are currently virtual as the courthouse remains largely closed to the public. When open, SHC refers petitioners as walk-ins to the Petitioner clinic, space for which is provided by the court in a private room within the Hayward Hall of Justice, facilitating convenient referrals for litigants. In addition, the Hayward Hall of Justice Children's Waiting Room has traditionally offered free childcare for parents and guardians who have court business, and this service is available to parties served by the DVPP Project when the courthouse is open. If required for public health reasons, the space and services will be virtual, and while the court remains closed, SHC will continued to refer petitioners to FVLC via warm referral emails to FVLC's Managing Attorney, who assigns the referrals for immediate outreach, intake and clinic scheduling.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Inland Counties Legal Services			
Project Name	Consumer Rights Clinic EXPANSION			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$319,310.00	\$151,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>Currently the Consumer Rights Clinic ("CRC") is a successful partnership between ICLS and the San Bernardino Superior Court providing legal assistance to unrepresented indigent consumers with debt collection lawsuits.</p> <p>This application expands the project to the Riverside Superior Court.</p> <p>The project will fund an attorney, a paralegal, and a legal secretary and builds upon a document automation application (created for the project with non Partnership funding) that allows consumers to respond, propound discovery, and attempt settlement with opposing counsel. All documents produced are reviewed by an attorney.</p> <p>As public health restrictions allow, the San Bernardino Superior Court (at the Justice Center, Central District) and the Riverside Superior Court (at the Riverside Self Help Center) will provide space for ICLS to operate and make referrals to the Clinic.</p> <p>Staff will serve pro se defendants in the courthouses or virtually on a regular schedule preparing responsive pleadings and settlement offers. Staff will attempt to settle/dismiss cases as soon as possible. The ICLS attorney will not represent the client on the record or appear in court on the clients behalf. Through counsel and advice and document preparation, the goal is to increase access to justice for clients and alleviate the demand on the court's time by resolving cases expeditiously.</p> <p>ICLS has mastered the process of working with clients and volunteer attorneys remotely and has the ability to operate remotely at any time when public health restrictions are in effect.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Superior Court of California, County of San Bernardino	Justice Center, Central District	247 West Third St., San Bernardino, CA 92415-0210	M/W 9a-1p & 2p-4p	48 hr/mo
Superior Court of California, County of Riverside	Riverside Self Help Center	3535 10th St., Riverside CA 92501	Tu/Th 9a-1p & 2p-4p	48 hr/mo

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Staff Attorney II	1	0.49
	Practice Group Director	0.05	0.02
		0	0
	Lawyers Total	1.05	0.51
Paralegals	Paralegal	1	0.45

		0	0
	Paralegals Total	1	0.45
	Legal secretary	0.09	0.05
Other		0	0
	Other Total	0.09	0.05

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	200	0	0
Document Preparation and Review	200	0	0
Filing or Services Assistance	200	0	0
Supervised Settlement Services	200	0	0
Post-hearing Assistance	100	0	0
Other	0	0	0
Explain Other			N/A

Community Engagement – Outreach	<p>(1) The Courts will distribute informational flyers at court locations and on its website.</p> <p>(2) ICLS will promote the Consumer Rights Clinic on its website and social media.</p> <p>(3) Community partners such as Legal Aid Society of San Bernardino, Inland Empire Latino Lawyers Association and Community Action Partnership of San Bernardino County distribute informational flyers to consumers they serve.</p> <p>(4) ICLS uses advertising media as funding permits, such as newspaper and radio.</p>
Attorney-Client Relationship	Yes
Conflict of Interest Protocols	ICLS maintains a Case Management System (CMS) that included archival records of all prior clients. This CMS is checked at intake for conflicts of interest by the Intake Team. Suspected conflicts are immediately flagged and reviewed by supervising attorneys on the Intake Team to determine acceptance or rejection.
Income Eligibility Guidelines	All applicants for the Consumer Rights Clinic will first be processed by ICLS's Intake Team. The Intake Team will ensure that all applicants are income qualified or age or disability qualified in accordance with Equal Access Fund eligibility requirements under BPC §6213 et. seq. Services will only be provided to pro se applicants with a San Bernardino County or Riverside County Court consumer issue pending.

Alternative Services	Applicants who do not qualify for services under this project are referred to ICLS's regular Consumer Law Team for relevant services or to the Lawyer Referral Services of San Bernardino and Riverside Counties as most appropriate and depending on resources.
Court's Role	<p>The San Bernardino Superior Court provided space at the Justice Center, Central District for ICLS in the publicly available research rooms in the Civil and Probate Clerks offices. The Court provides desks and electrical outlets. The Court distributes public notices informing consumers of the clinic and how to apply and the Court has posted the notice on its website.</p> <p>The Riverside Court will provide space at the Riverside Self Help Center and provide desks and electrical outlets. ICLS will work with the court to develop public notices informing consumers of the clinic and how to apply and will also ask that the notice be posted on its website.</p> <p>ICLS will work with the Riverside Superior Court to obtain use of similar space and resources.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Justice & Diversity Center of the Bar Association of San Francisco			
Project Name	FLASH			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$176,773.00	\$70,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>The Justice & Diversity Center of the Bar Association of San Francisco (JDC) requests a Partnership Grant to operate the Family Law Assisted Self Help (FLASH) project, which provides legal assistance to indigent Self-Represented Litigants (SRLs) at the San Francisco Superior Court (Court), via its ACCESS Center. Services consist of direct legal assistance to SRLs on the Family Centered Case Resolution (FCCR) Calendar, where cases that have failed to conclude are called. The FLASH Attorney works with income-qualified litigants on this calendar and thereafter to complete their matters. The FLASH Attorney also meets one-on-one with SRLs referred by the ACCESS Center throughout their cases. She provides information and guidance and drafts all necessary pleadings for SRLs who cannot complete their paperwork without her assistance.</p> <p>As a result of the COVID-19 pandemic, JDC has developed innovative methods to communicate and interact with SRLs. Our intake form has been converted to an electronic fillable document so the ACCESS Center can complete the initial set of pleadings for each SRL. Additionally, we have added text communication capability as most of the FLASH Attorney's low-income clients are unable to use video-conferencing.</p> <p>In March 2020, the Court ended Mandatory Settlement Conference (MSC) Workshops and, indeed, all workshops or group meetings. The Court now refers litigants directly to JDC when income-qualified SRLs need help with MSCs and MSC Statements. The FLASH Attorney works individually with these clients to complete the extensive MSC Statement and to prepare to present their cases at the MSC.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
San Francisco Superior Court	Unified Family Court, ACCESS Center	400 McAllister Street, San Francisco, CA 94102	Monday through Friday, 9:00 am to 5:00 pm	140

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	FLASH Attorney	1	0.4
	Family Law Supervising Attorney	0.06	0.03
	Director/Managing Attorney	0.03	0.02
	Lawyers Total	1.09	0.45
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other		0	0

		0	0
	Other Total	0	0

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		156	0	0
Document Preparation and Review		195	0	0
Filing or Services Assistance		98	0	0
Supervised Settlement Services		98	0	0
Post-hearing Assistance		39	0	0
Other		26	0	0
Explain Other	The "Other" category in the above "Goals and Objectives" table includes miscellaneous legal services provided to SRLs whose cases and legal needs do not fit easily into the other listed categories. For example, we provide more extensive efforts to assist litigants who are unaware of the whereabouts of opposing parties for service of process and guide service of process on parties residing in other countries.			

Community Engagement – Outreach	The Court sends out a Notice of Hearing to litigants whose cases have been inactive for 18 months or more. Eligible litigants receive information with their Notice notifying them that legal assistance is available to them through the ACCESS Center. Family law judges also directly inform litigants of available FLASH services available through the ACCESS Center. If JDC has not been able to speak with the SRLs prior to the calendar call, litigants are notified of JDC's and ACCESS' services at the hearing.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	<p>JDC and ACCESS staff conduct subject matter and income eligibility screening procedures prior to hearings by checking the Court file for fee waiver and/or Income and Expense Declarations. A second screening is conducted by the FLASH Attorney when she meets with litigants. All customers will have incomes under 125% of the federal poverty level.</p> <p>All litigants are screened for income eligibility initially by ACCESS Center staff, which screening is then confirmed by the FLASH Attorney at the first meeting with the litigant. The FLASH Attorney reviews income documentation – such as pay stubs, tax returns, or eligibility documentation from another public benefit exclusive to indigent individuals. Only individuals or families with incomes at or below 125% of the federal poverty level will be provided FLASH-Care services.</p>

Alternative Services	<p>For litigants who are ineligible for services due to income, subject matter, or residency, JDC refers them to other JDC projects as appropriate and to the Bar Association of San Francisco's Lawyer Referral Information Service (LRIS). Referrals are generally made directly from JDC to LRIS to ensure that the litigant does not have to repeat his or her story many times. JDC and LRIS, as part of the umbrella of the Bar Association of San Francisco, have been working together closely for more than 40 years and refer thousands of cases back and forth to each other throughout the year. Customers from other counties are generally referred to agencies in those counties. JDC works closely with these agencies to ensure that it has their most accurate and up-to-date information on file. Cases not income eligible can also be assisted either by workshop or through one-on-one services at the ACCESS Center.</p>
Court's Role	<p>The San Francisco Superior Court provides the in-kind contribution of office space and computer terminals that significantly facilitate JDC's ability to operate the project onsite at the courthouse. Further, the Court sends JDC staff members the case list for each Readiness Calendar day, enabling the FLASH Attorney to preliminarily identify SRLs for potential service provision.</p> <p>Specifically, the Court agrees to provide the following resources to the FLASH Program:</p> <ul style="list-style-type: none"> a) Meet with JDC personnel regularly to plan, implement, and evaluate the project. b) Provide appropriate office space for the project attorney in which the project attorney can conduct one-on-one appointments with customers. c) Provide information on SRLs set to appear before the Family Centered Case Resolution (FCCR) Calendar. d) Provide access to computer, fax machine, and a copy machine for the use of the project attorney. e) Work with JDC to screen and assess cases, to make appropriate referrals, and to help pro per litigants navigate the judicial process. f) Provide JDC staff with access to the ACCESS Center's legal resources library and customer resource materials. g) Cooperate with JDC's efforts to support the project by endorsing grant applications and participating in the implementation and evaluation of grants consistent with the goals and mission of the ACCESS Center. h) Assist JDC with training, supervising, and managing of the FLASH Attorney.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	LACBA Counsel for Justice			
Project Name	Domestic Violence Legal Services Project (DVP)			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$124,678.00	\$104,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>The LACBA Counsel for Justice Domestic Violence Legal Services Project (DVP or Project) assists self-represented litigants in restraining order cases. DVP provides legal information, referrals, and individual services with court forms such as requests, responses, and renewals. The main goal of the Project is to bridge the access to justice gap for restraining order litigants in these complex cases by providing information and forms preparation; thereby enabling litigants to make informed choices about their legal problems and properly present their issues to the court. DVP recruits and trains volunteer lawyers and law students who work one-on-one with litigants to prepare the court forms with review by the Project Attorney. DVP also operates two self-help kiosks where litigants prepare their own forms using the Court's web-based forms production program, with review by the Project Attorney. DVP is located on the second floor of the Stanley Mosk Courthouse, along with the Restraining Order Center and Family Court Services. DVP is open Monday-Thursday from 8:00-12:00 and 1:00-3:30 and Friday from 8:00-12:00. The Project is staffed by a Project Attorney and a Paralegal who work with litigants and assist and supervise volunteers. DVP's Directing Attorney is responsible for overall supervision and direction of the Project. As it has for over 30 years, DVP works closely and continuously with the Court on issues including cross-referrals, program development, and evaluation.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Los Angeles County Superior Court	Mosk	111 N. Hill Street Room 235, Los Angeles CA	M-Thurs 8:00 - 12:00 and 1:00-3:30, Fri 8:00 - 12:00	120 hours

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Project Attorney	1	0.5
	Directing Attorney	0.35	0.2
		0	0
	Lawyers Total	1.35	0.7
Paralegals	Paralegal	1	0.9
		0	0
	Paralegals Total	1	0.9
Other		0	0
		0	0
	Other Total	0	0

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	2400	0	0
Document Preparation and Review	2400	0	0
Filing or Services Assistance	1920	0	0
Supervised Settlement Services	200	0	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other			

Community Engagement – Outreach	The Court's ROC and SHRC each refer the bulk of the litigants to DVP. Other court based legal services providers also refer directly to DVP for assistance with restraining order cases. DVP staff participate in community networking events and meetings. These meetings provide the opportunity for the community to learn and understand the services that DVP provides. DVP has strong relationships with the Los Angeles County Domestic Violence Council and participates in various committee meetings. The DVP is also a partner in the Central Bureau-Family Justice Center and works with co-located community partners to provide information to their clients seeking services. Training is provided to community partners on restraining order services provided by the DVP. The DVP also provides printed materials on its services to local law enforcement agencies, hospitals, and community agencies and maintains web pages on the LACBA website with specific information about services as well as general information about domestic violence.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	The Project assists in the following case types: (1) domestic violence restraining orders; (2) elder abuse restraining orders (when physical violence has been alleged and the parties do not meet the relationship requirement of the DVPA, or some other factor warrants the use of EARO over DVRO); and (3) civil harassment restraining orders (when the parties do not meet the relationship of the DVPA and sexual assault has been alleged). Litigants are screened for subject matter eligibility by Court staff prior to referral and are also screened by the Project Paralegal. Litigants who are eligible for the project will also meet the definition of "indigent person" for the purpose of the Legal Services Trust Fund Program. As DVP delivers legal services through pro bono attorneys, the Project will use the income limit formulas based DHHS and HUD formulas. Before services are provided, the litigant will complete an intake form asking questions relevant to determination of eligibility under the definition. The intake staff will input this information into the Project's case management system which contains a formula determining eligibility. If the system is not available, staff will do the determination using the income eligibility chart.

Alternative Services	<p>DVP provides walk-in services to litigants regardless of income level. Litigants with income above the eligibility for Partnership funding are served using resources from other funding sources. Litigants who need assistance with legal issues beyond the scope of the Project are referred to the Court's Self-Help Resource Center or to various other legal services as needed. The Project maintains an updated list of local legal services organizations serving the public with needs such as housing, immigration, and family law. The Project also maintains an updated list of other social service agencies for common needs such as domestic violence support, housing, mental health, and food assistance.</p>
Court's Role	<p>The Court provides a former courtroom for the DVP, which the court has remodeled to have a lobby and eight cubicles, along with telephone and internet access and office furniture. The court also provides parking to DVP staff and volunteers. Court staff are available to assist DVP's IT staff with installation of equipment as needed.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Aid Society of San Diego			
Project Name	Name Change & Gender Change Self-Help Clinic			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$129,961.00	\$85,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No			Pending	
Project Abstract	<p>In partnership with the San Diego Superior Court, LASSD seeks funding to operate the Name Change & Gender Marker Change Self-Help Clinic in 2023. This project fills a gap in the San Diego County self-help services, as there are no other court-based projects providing services related to this substantive legal area. The aim of the project is to help indigent, self-represented litigants fully participate in the legal system when in need of a name and/or gender marker change by providing one-on-one assistance to participants, including document preparation and information on the court process. Providing services to self-represented litigants in this area will not only help and educate the litigants but will also help the court by cutting down on time spent by clerks and the court on litigants navigating the court process without assistance. The advent of the Real ID in California has increased the need for assistance with name changes. People who seek Real IDs discover that their documents do not match and need assistance obtaining a decree of name change in order to obtain the Real ID.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
San Diego Superior Court	Hall of Justice	330 W. Broadway, San Diego, CA 92101	MTWThF/8:30-3:30	140

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Staff Attorney	1	0.81
		0	0
		0	0
	Lawyers Total	1	0.81
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other		0	0
		0	0
	Other Total	0	0

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0

Information on Court Procedures and Hearing Preparation	0	0	0
Document Preparation and Review	0	0	0
Filing or Services Assistance	0	0	0
Supervised Settlement Services	0	0	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other			N/A

Community Engagement – Outreach	We communicate our services to the public through flyers at the courthouses, law libraries, and organizations serving our target populations. LASSD's hotline also receives over 90,000 calls a year and directs individuals to services such as this project. Many of our referrals also come directly from the court clerks and judicial officers. LASSD staff conduct community outreach presentations at senior centers, disability fairs, local schools, and other community organizations to inform the public of our services. LASSD's website, the San Diego Superior Court's website, and 211 (San Diego County's resource and information hotline and website for community services) also provide information on the Program and direct litigants to the clinic.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	Participants are screened for eligibility when they sign into the clinic. Each participant completes an application for services which inquires as to income, subject matter, and jurisdiction/geographic eligibility. Eligibility for partnership-funded project services require the litigant to be a San Diego County resident, income eligible, and requesting assistance with a name and/or gender marker change petition or objection.
Alternative Services	Those who are ineligible due to subject matter or jurisdiction/geographic eligibility will be referred to other clinics, service providers, the San Diego Law Library, and the San Diego County Bar Association's Lawyer Referral and Information System (LRIS). Those who are ineligible due to income will be assisted using self-help court funds or will be referred to the San Diego County Bar Association's LRIS.
Court's Role	The court provides a large office to LASSD where self-help services are provided. The court also provides security for the clinic in connection with the regular security the Sheriff's department provides at the courthouse. The court provides computers, printer/copiers, utilities, telephone services, and internet access with IT infrastructure to support secure, third-party internet access. The court also provides access to the courthouse to authorized LASSD personnel by providing a court badge. Finally, the court has provided protective barriers for use inside of the clinic during the pandemic.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Assistance for Seniors			
Project Name	Partnership to Assist Limited Conservatorship Litigants			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$54,083.00	\$50,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>The Partnership to Assist Limited Conservatorship Litigants is a collaborative effort of Legal Assistance for Seniors (LAS), Legal Access Alameda of the Alameda County Bar Association (LAA) and the Alameda County Superior Court. The Partnership will provide legal assistance to low income, pro per litigants in limited conservatorship cases. Limited conservatorship cases have complex procedural requirements that are often daunting to pro per litigants who are typically more focused on providing and coordinating the care needed for their loved one. Many of the litigants in Alameda County do not speak English and have trouble navigating the legal system, which can lead to delays in their ability to provide adequate care. This Project allows the Partners to meet a currently unmet need in Alameda County. Partners will assist with temporary petitions, general petitions, objections, orders after hearing and other petitions necessary to meet procedural requirements. The partners will develop sample documents and instructions designed to assist with local rules and the complicated procedural process. The litigants will be assisted at workshops with one workshop a month dedicated to the complex notice requirements in these matters. Virtual assistance and one-on-one assistance will also be provided. LAA volunteers and LAS staff will assist litigants at their court hearings when needed. The goal of the partnership is for the partners to use their experience assisting pro per litigants navigate with the complex procedural requirements of limited conservatorship cases and to avoid multiple continuances that take up court resources and frustrate litigants.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Alameda County Superior Court	Self Help Center	661 Washington St., Oakland, CA	Monday 1:30-4	6
Alameda County Superior Court	Berkeley Courthouse	2120 Martin Luther King Jr. Way, Berkeley, CA	as needed	as needed

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Legal Director	0.1	0.1
	Supervising Attorneys	0.09	0.09
		0	0
	Lawyers Total	0.19	0.19
Paralegals	Advocate	0.3	0.3
		0	0
	Paralegals Total	0.3	0.3
Other	Exec. Dir & Admin Asst/intake	0.02	0.02

	Assoc. Dir, Tech. Specialist, Admin Asst/Reception	0.02	0
	Other Total	0.04	0.02

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		60	26	60
Document Preparation and Review		60	26	60
Filing or Services Assistance		40	26	60
Supervised Settlement Services		20	26	20
Post-hearing Assistance		0	0	0
Other		40	0	0
Explain Other	In order to provide quality services, the partners spend a lot of time reviewing changes to the local rules and procedures made throughout the year. During the pandemic, we have been reaching out to litigants after assisting them with their procedural issues to make sure they understand how to appear virtually and have the proper log-in information. Our goal is to not only assist the litigants with proper filings but to make sure their matters are heard and they have proper access to justice. We also often field calls from family members who we cannot count for our service numbers but we still provide information about how to attend the hearings.			

Community Engagement – Outreach	The availability of these services will be communicated to litigants and the community in multiple ways across several formats. The court staff, including the Judges, alert litigants who may qualify for the workshop. There is also a flyer distributed at various courthouses and other locations around Alameda County which provides information about the workshops and assistance available through the project. This flyer has been translated into multiple languages. All the websites of the partnership members (LAS, LAA and Self-Help) have information posted about the program. All the partners in the project take calls directly from the community, and staff is trained to identify and refer anyone who would qualify for these services. The Partnership has a wide range of community partners and contacts, and will use that network to make sure that anyone who qualifies for the services has the information they need to take advantage of the services provided. We also make sure the Regional Center staff are aware of our services and know how to refer people. We have a close relationship with the Public Defender who is appointed to represent all of the proposed conservatees in these matters. He provides email introductions to LAS and Self Help for litigants in his cases that need assistance.
Attorney-Client Relationship	Yes

Conflict of Interest Protocols	<p>The Self Help Staff and LAA volunteers will not establish an attorney-client relationship. LAS represents dependent adults in elder abuse cases so will need to do a conflict check prior to assisting petitioners. If LAS has a conflict, the litigant will be assisted by Self Help Staff or a LAA volunteer. The litigants will be asked to sign an agreement indicating that they understand that the services are being provided to them in pro per and that they are responsible for their own case. The agreement makes it clear that they will not be represented at court hearings. This agreement is reviewed with the litigant prior to any assistance so the litigants have the opportunity to seek legal representation before any assistance is provided. The litigants are also instructed that the assistance provided is to assist them with the procedural process and the partners cannot provide any advice about any substantive information contained in their filings.</p>
Income Eligibility Guidelines	<p>The litigants will be screened for subject matter eligibility when they contact any of the partners for assistance. The partners will all be trained to understand the difference between limited conservatorships, LPS conservatorships and conservatorships so litigants seeking assistance for matters other than limited conservatorships can be referred appropriately. LAS represents developmentally disabled individuals in obtaining restraining orders under the Welfare and Institutions Code and therefore may potentially have a conflict with litigants. If there is a conflict, one of the other partners will assist the litigant. The litigants will be screened to ensure they are Alameda County residents, currently unrepresented and they meet the income requirements required for the project.</p>
Alternative Services	<p>If after the intake screening, it is determined that a litigant is seeking assistance that is not related to a limited conservatorship matter, the person will be given a referral. We have found that the majority of litigants who are ineligible for assistance through this program are seeking a conservatorship for someone who is mentally ill (LPS Conservatorship) or has capacity issues unrelated to a developmental disability (General Conservatorship). Those persons are referred to the Alameda County Bar Association's Lawyer Referral Service. If litigants are seeking assistance with a matter unrelated to a conservatorship they may be referred to the appropriate non-profit or other Self Help Workshop that may be able to assist them. Litigants who are not eligible for this project's services due to their income being above the limit will still be assisted by the court's Self Help Center. The Self Help Center cannot decline services based on income and assets.</p>
Court's Role	<p>The Court's Self Help Center is currently closed to the public but the goal is to return to the space at the Self Help Center in the Wiley Manuel Courthouse for bi-weekly workshops. The court will provide access to a copier. Limited Conservatorship hearings in Alameda County are currently held remotely over Zoom. The Partners are piloting a workshop targeted to assist litigants with their procedural issues prior to their hearing. If the hearings remain remote, the Partners plan to provide day of court assistance in break-out rooms. If the hearings return to in-person, the court will provide a room at the Berkeley Courthouse for the day of court assistance and access to a copier. The court has also provided LAS attorneys with the ability to access non-confidential court filings that could previously only be viewed on computers located at the courthouses. This allows LAS attorneys to review filed documents in order to assist litigants in clearing up any procedural issues. It is also extremely helpful when assisting the litigants with proposed orders and the letters that must be filed after the order is granted.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Access Alameda			
Project Name	Family Law Day of Court			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$72,606.00	\$25,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>Legal Access Alameda's Family Law Day of Court Clinic (FLDOC) is an in-court clinic where volunteers take referrals directly from the bench on the Family Law Pro Per Request for Order (RFO) calendars. In Alameda County, self-represented litigants (SRLs) are generally assigned a specific day on each Family Law Department's calendar. Each clinic is staffed by a supervisor, either the FLDOC Supervising Attorney or a Self-Help staff person, and one to three volunteers. Volunteers and clinic staff work closely with judicial officers and courtroom personnel. The clinic seeks to assist all SRLs whose cases are set on the RFO calendar and who appear for their hearing. The hearings are short-cause hearings that are generally for child custody, visitation, and support.</p> <p>FLDOC provides assistance to the six non-DCSS family law departments on their pro per RFO calendars. These calendars occur in the morning or afternoon, several times per week. The FLDOC clinic has provided services remotely via BlueJeans since May 2020 and will do so in 2023 if necessary.</p> <p>The primary goal of the clinic is to provide SRLs with signed, clear, and enforceable orders as soon as possible after their hearing. Clinic staff and volunteers draft the orders immediately after the hearing, and submit proposed orders for the judge's signature and filing by the court clerk. FLDOC also assist SRLs by clarifying the newly-issued orders, explaining legal terms and court procedures, completing necessary paperwork, and running child and temporary spousal support calculations.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Alameda County Superior Court	Hayward Hall of Justice	24405 Amador Street, Hayward CA	Monday: 9:00 a.m.-12 p.m. Tuesday: 8:30 a.m.-12 p.m.; 9:00- 12 p.m. (two clinics) Wednesday: 8:30 a.m.-12 p.m.; 1:30-4:30 p.m. Thursday: 8:30 a.m.-12 p.m.	81.5

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	FLDOC Supervising Attorney	0.8	0.35
	Legal Access Director	0.02	0
		0	0
	Lawyers Total	0.82	0.35
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other		0	0

		0	0
	Other Total	0	0

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	0	0	0
Document Preparation and Review	0	0	0
Filing or Services Assistance	0	0	0
Supervised Settlement Services	0	0	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other			n/a

Community Engagement – Outreach	Self-represented litigants are referred to the FLDOC clinic directly by the judicial officers hearing the pro per RFO calendar. Legal Access and the Self-Help Center also communicate the availability of services to SRLs who call the Legal Access intake line or who contact the Self-Help Center by phone and live chat.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	<p>Legal Access Alameda income guidelines are based on 75% of income for lower income households in Alameda County as defined by Health and Safety Code section 50079.5(a) and Business and Professions Code section 6213(d). This income guideline allows Legal Access to serve the poor and working poor in Alameda County -- individuals and families who often have regular incomes but do not make enough to afford legal assistance. This guideline is also used for the FLDOC program.</p> <p>The FLDOC program assists all self-represented litigants (SRLs) who are referred by judicial officers on a pro per RFO calendar. In Alameda County, self-represented litigants are generally assigned to days in which the six non-DCSS family law departments have Pro Per RFO calendars. The FLDOC clinic takes place on all six of these pro per RFO calendars. All clients are asked to declare their gross monthly income to track which clients are income eligible for services funded by the partnership grant. Litigants are asked to sign the intake that the statements they have made about income are correct. The Court requires all SRLs appearing on the pro per RFO calendar be provided services regardless of income. Therefore, Income ineligible clients are served by the FLDOC supervising attorney on time paid for by money provided by the Court: .4 FTE of the FLDOC Supervising Attorney's salary. Because the Court requires all SRLs be given services regardless of income, they are willing to provide additional funding to ensure over-income SRLs are also served.</p>

Alternative Services	<p>Since the FLDOC program assists nearly all self-represented litigants who are referred by judicial officers during the clinics, there are no alternative resources or referrals provided to those litigants who are over the income eligibility guidelines. Clinic staff and volunteers provide information about other legal, governmental, and social services agencies to all SRLs, where appropriate. Legal Access staff has given Family Law Bench Officers alternative options to provide to those individuals who are ineligible for assistance with support calculations, such as the bench officer running the calculation themselves, using the resources at the law library, or hiring an attorney on a limited scope basis to complete the calculation.</p>
Court's Role	<p>The Court provides a desk and shared office space for the FLDOC Supervising Attorney and a contractor's badge for entry to secure areas of the courthouse. The Court also provides a laptop with access to the following systems and programs: Domain (the Court's case management system), Essential Forms software for drafting orders and judgments, and DissoMaster for computing support calculations. The Court's Office of Information Technology offers technical support and updates for these programs at least twice per year and on an as-needed basis.</p> <p>Additionally, the Court grants special permission for clinic staff to be moderators on its videoconferencing platform (BlueJeans) in order to conduct the clinics remotely. As moderators, clinic staff can create breakout rooms for volunteers and litigants for one-on-one assistance. During the hearing, the Court also provides language interpreters as needed to clinic staff and volunteers to facilitate communication with litigants.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Access Alameda			
Project Name	Family Law Status Conference Clinic			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$98,140.00	\$65,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>The Family Law Status Conference Clinic ("FLSC Clinic") offers assistance to litigants appearing on Self-Represented Litigant Family Law Status Conference calendars in a family law department. This program brings a Legal Access staff attorney (the FLSC Attorney) on-site to provide expanded services to litigants and oversight of volunteer attorneys. The FLSC clinic assists with Dissolution, Legal Separation, Nullity, and Parentage cases. Clinic staff (the FLSC attorney and Self-Help staff) and volunteers help litigants understand case procedure and complete or correct necessary forms, with the ultimate goal of assisting litigants in moving their cases to a final resolution, either by completing a judgment or referring the case for trial setting. This helps the court with the status conference compliance requirement under CRC Rule 5.83(c)(2) and facilitates more efficient support to litigants with on the spot assistance and by identifying issues early on in the process.</p> <p>Before CoVid19, the FLSC clinic occurred Tuesday and Thursday afternoons, and some Friday mornings, providing all services in person. In 2020 the FLSC department started holding all hearings via BlueJeans video conference and consolidated all FLSC clinic cases to Tuesdays. While providing services remotely, clinic staff send litigants required forms via email and mail. The FLSC Attorney also sends letters to litigants before each clinic, which include description of how to complete the next step, required forms and filing options. The FLSC has operated remotely since 2020 and Legal Access will continue to work with our court partners to provide services remotely in 2023 if necessary.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Alameda County, Superior Court	Hayward Hall of Justice	24405 Amador Street, Hayward CA 94544	Every Tuesday 1pm -5 pm 2nd Day each week for 4 hours, TBD exact day & time based on court and courtroom staff availability.	32

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	FLSC/Court Programs Managing Attorney	1	0.75
	Director Legal Access Alameda	0.02	0
		0	0
	Lawyers Total	1.02	0.75
Paralegals		0	0
		0	0
	Paralegals Total	0	0

Other		0	0
		0	0
	Other Total	0	0

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		0	0	0
Document Preparation and Review		0	0	0
Filing or Services Assistance		0	0	0
Supervised Settlement Services		0	0	0
Post-hearing Assistance		0	0	0
Other		0	0	0
Explain Other	<p>The FLSC clinic's overarching goal is to provide assistance to low income self-represented litigants that helps them efficiently move their family law case forward, ideally to a final resolution. The FLSC clinic seeks to reduce the number of status conferences litigants attend before a final resolution is reached. The FLSC clinic provides on the spot one-on-one assistance, completes forms where possible, and assist litigants with a final judgment or request to dismiss. Over the past 3 years the FLSC clinic has helped litigants complete over 300 judgments, we aim to continue this work and further refine our final judgment process in 2023. The FLSC clinic also aims to catch issues in cases and correct errors in paperwork early on in the process, saving litigants from needing to complete additional filings and problems later on. When meeting with litigants at the clinic, staff and volunteers point out errors in filed paperwork and offer assistance with fixing those errors. Finally, the FLSC clinic seeks to leave attendees with a better understanding with their cases and the process of a family law case. Clinic staff and volunteers discuss the next steps with litigants and litigants are able ask questions about their case. Ideally, litigants leave each FLSC clinic with a better understanding of the overall case procedure and what specific things they need to do to move their case forward. This education of family law litigants on the process and procedure of family cases is another important goal of the FLSC clinic.</p>			

Community Engagement – Outreach	<p>Litigants are informed of the availability of the FLSC clinic services in a number of ways. Some litigants are referred to the FLSC clinic by the clerk's office for an Initial Family Law Status Conference. The notice that is sent out to all parties regarding their Initial Family Law Status Conference that is set by the clerk's office states the parties may receive assistance at their status conference.</p> <p>In 2021 Legal Access began working more closely with the family law bench officers regarding which cases are appropriate for referral to the FLSC clinic, upcoming available clinic dates and the type of services provided at the clinic, the bench officers in turn share this information with litigants when referral a case to the clinic. The FLSC attorney sends an email to each family law bench officers each week suggesting cases for referral and often fields emails from the bench officers about potential cases in their department that could use the assistance of the clinic. Legal Access and Self-Help Staff will continue to work with the bench officers, particularly the new bench officers on the best ways to share information about the FLSC clinic to SRLs in Alameda County.</p> <p>Legal Access Alameda will also communicate the availability of the services to self-represented litigants who call the Legal Access intake line. Self-Help Center's staff will share FLSC clinic services with some litigants who contact the Self-Help Center seeking legal assistance in family law matters.</p>
Attorney-Client Relationship	<p>No</p>
Conflict of Interest Protocols	<p>N/A</p>
Income Eligibility Guidelines	<p>Legal Access Alameda income guidelines are based on 75% of income for lower income households in Alameda County as defined by Health and Safety Code section 50079.5(a) and Business and Professions Code section 6213(d). This income guideline allows Legal Access to serve the poor and working poor in Alameda County -- individuals and families who often have regular incomes but do not make enough to afford legal assistance. These income eligibility guidelines are used in the FLSC program as well.</p> <p>The FLSC Attorney, Self-Help Staff Attorney and volunteers will assess each litigant's financial eligibility by conducting an intake for each litigant, which includes gathering pre-tax income information and age. Litigants are asked to sign the intake that the statements they have made about income and age are correct. The Court requires income ineligible self-represented litigants set on this calendar are also provided services and the Court has provided additional funding to cover some of the FLSC Attorney's time (25%) to reflect that.</p> <p>Additionally, the FLSC Attorney reviews all cases set on the clinic calendars at least two weeks before the schedule is to confirm that each case is the correct type of cases (dissolution, legal separation, nullity or parentage), that there has not already been a final judgment entered and that there are no attorneys in the case. The FLSC Attorney brings any ineligible cases to the attention of the clerk in Department 504 who will take the matter off the FLSC clinic calendar.</p>

Alternative Services	The Court requires that all litigants who are set on the FLSC clinic calendars are eligible for at least some services, however, if high earning self-represented litigants are referred to the clinic by the family law bench officers, clinic staff will limit the services offered to those litigants. Clinic staff will refer those high income litigants to the Lawyer Referral Service of the Alameda County Bar Association and not set those cases for a second FLSC clinic.
Court's Role	<p>The FLSC Attorney is provided with a desk in an office with the Self-Help Center staff at the Hayward Hall of Justice. The Court has also provided access to a laptop computer with the court's case management system so the FLSC Attorney can review and prepare all cases. The FLSC Attorney also has access to software needed to assist these cases, Domain, DissoMaster and Essential Forms. Finally, the court has permitted the FLSC Attorney with a court contractor badge so they may access restricted areas of the courthouse.</p> <p>While working remotely, the FLSC Attorney is able to use the court laptop from home to access the case management system Domain, Essential Forms, and DissoMaster. Additionally, the court has permitted the FLSC Attorney to log on to the BlueJeans clinics as a guest moderator which allows the attorney to easily move litigants and staff/volunteers into breakout rooms and provide one-on-one services to litigants.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Aid Foundation of Los Angeles			
Project Name	2023 - Torrance Self Help Partnership Grant			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$375,895.00	\$100,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No			Pending	
Project Abstract	<p>Legal Aid Foundation of Los Angeles (LAFLA) is applying for continuation funding to supplement staffing at the Torrance Self-Help Legal Access Center ("center") in the Torrance Courthouse and provide expanded services in Family Law, Restraining Order and Landlord-Tenant cases. The staff has recently resumed on-site services to target urgent housing and restraining order related matters and continues to handle referrals from the Court's self-help phoneline while maintaining Self-Help remote services. This grant application seeks to help the Center further integrate service hybridity (combining simultaneous on-site and off-site services) and grow our onsite capabilities in the space allocated by the Court at the Torrance Courthouse. As we hope to continue re-emerging from the Covid-19 public emergency health crisis ("health crisis"), the center shall serve as an important legal oasis for litigants living on the wrong side of the digital divide.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Los Angeles Superior Court	Torrance Courthouse	825 Maple Avenue., Torrance, CA 90503	M-Th 8:30-12 pm, 1 pm-4:30 pm; Friday 8:30 to noon	140

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Attorney	1	0.75
	Attorney	1	0
		0	0
	Lawyers Total	2	0.75
Paralegals	Paralegal	1	0
		0	0
	Paralegals Total	1	0
Other		0	0
		0	0
	Other Total	0	0

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court	10000	100	1600

Procedures and Hearing Preparation			
Document Preparation and Review	0	0	0
Filing or Services Assistance	0	0	0
Supervised Settlement Services	0	0	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other	Our overall project goal is to work with the Torrance court administration to safely rebuild onsite individual services and workshops for self-represented litigants with increased flexibility of services. We'll continue to identify new collaborative partners for outreach activities to increase participation to pre-pandemic levels. The above referenced goals and objectives come with the underlying assumption that our court partners will not significantly alter their operational approach and that no major health related restriction will alter our ability to resume services moving forward.		

Community Engagement – Outreach	<p>In addition to texting and email resources directly to litigants, the center will distribute pamphlets onsite in different languages to litigants and the community about legal information that is available on the website. We are committed to re-engage community leaders, organizations and churches in the Torrance area and surrounding communities that work with underserved and LEP populations. We will also conduct outreach through participation in community events, resource fairs and cultural celebrations as those venues reopen to the public.</p> <p>In response to the pandemic, LAFLA has implemented a multilingual marketing campaign to reach clients to let them know our services are available even though our physical offices have, at times, been closed. We have produced informational brochures and postcards in multiple languages, which we continue to disseminate among our community partners and members. Furthermore, we promote the availability of our services via our digital channels — social media and our website — where we have thousands of followers and web visitors. We also ensure we have up-to-date translations for key information in the languages that our diverse community members speak. Also in the digital space, we keep litigants and community members apprised of changes in the availability of our services through regular email communications, including newsletters. We have also partnered with LATV (a bilingual television network) and launched an integrated marketing campaign that included Spanish-language TV ads, integrated social media campaigns including content creation, and PSAs on radio stations.</p>
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	<p>The self-help portal of LAFLA's website provides information regarding the services offered online and at the Center regardless of income and residency. Those litigants who visit the center after reviewing the website will be screened by intake screeners for subject matter eligibility and provided information on the types of services in which the center can assist self-represented litigants. Prior to receiving services, walk-in litigants receive an intake form through which to provide information about income, gender, number of people within the household, ethnicity, language spoken and education level. Intake forms are collected by staff and volunteers, and entered into a database for tracking service delivery.</p>

Alternative Services	If the center is not able to assist, the intake staff will provide referral information for those individuals whose needs the Center cannot meet directly due to resource limitations or other restrictions. Center staff will spend time with every litigant who must be turned away in order to determine the nature of the litigant's problem and, therefore, the most appropriate referral entity. The Center has developed a list of areas in which it does not service, and distributes referral sheets. On the website, self- represented litigants who are unable to visit the Center and need assistance with matters that the Center does not handle will have access to a referral list of nonprofit and government agencies.
Court's Role	With strong Court support and cooperation, the centers work effectively to offer core area of services to litigants. We work in a co-located site with Court staff in Court provided self-help center space, using Court computer terminals where litigants access "Hot Docs" online document assembly applications, internet/phone access, printers & printer supplies, utilities, security and the center's furniture. Beyond email communications, we collaborate on Microsoft Teams communications and share oversight for Webex hybrid workshops.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Aid Foundation of Santa Barbara County		
Project Name	LRC Partnership		
Grant Year	Total Budget	Amount Requested	Amount Awarded
2023	\$371,344.00	\$138,000	
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse
No			Pending
Project Abstract	<p>LAFSBC proposes to continue Partnership funding for a self-help attorney for the civil Legal Resource Centers (LRC) and a part-time assistant. Until the hiring of a 3rd LRC attorney with Partnership funds in 2020, the staffing level of the Legal Resource Centers had not increased for at least 15 years. In calendar year 2021, the LRCs countywide served over 6,000 self-represented litigants in civil matters. We seek to continue our 2022 project. The LRC partnership attorney will work 1 day per week in person at the Lompoc courthouse. On the remaining days, the bilingual LRC Partnership attorney will assist SRLs countywide by phone, email, or videoconference, with a focus on mid and south county residents. The LRC assistant will provide in-person bilingual support to the LRC at the Santa Barbara courthouse and other data entry assistance. The other two attorneys, funded separately, will cover in-person services Santa Barbara and Santa Maria. We believe that by providing a combination of remote and in-person services, we will best meet the needs of residents across the 75 mile length of our county.</p>		
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours
			Total Hours/Month

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	LRC Lawyer	3	1
		0	0
		0	0
	Lawyers Total	3	1
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other	LRC Bilingual Assistant	0.4	0.4
		0	0
	Other Total	0.4	0.4

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	300	0	0

Document Preparation and Review	300	0	0
Filing or Services Assistance	800	0	0
Supervised Settlement Services	75	0	0
Post-hearing Assistance	0	0	0
Other	25	0	0
Explain Other	Individuals may receive more than one type of service. For example, they may receive information and document preparation.		

Community Engagement – Outreach	Current LRC services are advertised on the Legal Aid and Superior Court website. Potential LRC litigants are referred for LRC services by Legal Aid intake coordinators, court staff, local government agencies, other non-profits, and more. Since the LRC Partnership attorney provides an expanded set of services that LAF already provides, we do not anticipate that we will need to do a large amount of outreach to raise awareness about the expanded services. Demand remains high at all LRC locations.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	All SRLs sign an intake form which explains the limited scope of service. The form includes a survey of income information and requests basic demographic and age information. We would propose to keep LRC procedures consistent across the program despite source of funding so that no one is turned away. We prioritize a low barrier procedure for service because assistance is provided on a first-come, first-served basis. The LRC attorney will see as many SRLs (self-represented litigants) as time allows. LRC Partnership funding supports approximately 1/3 of the LRC Program, and we know from surveys that at least 1/3 of LRC customers are indigent.
Alternative Services	It is not anticipated that litigants will be turned away due to ineligibility. Family Law SRLs will be referred to the Family Law facilitator, and in North County, individuals with Guardianships or Conservatorships will be referred to the Probate Facilitator. Litigants needing legal representation may be referred to Legal Aid, California Rural Legal Assistance, or the Santa Barbara County Bar Association Lawyer Referral Service.
Court's Role	The court will provide physical space for the Lompoc Legal Resource Center and also provides a laptop which was secured as part of a special grant. The court also grants Legal Resource Center staff to enter data into STARs. The LRC staff work closely with court clerks and other court staff in providing services to self-represented litigants.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Aid of Marin			
Project Name	Homelessness Prevention Through Mandatory Settlement Conferences			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$112,480.00	\$80,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>Established in 2012, the Marin Superior Court Unlawful Detainer Settlement Conference Program is recognized by the Judicial Council as an innovative, efficient and effective trial court program for unlawful detainers (https://www.courts.ca.gov/27438.htm). Before physical access to courts was limited by COVID, Marin Superior Court and Legal Aid of Marin collaborated to offer Conferences in the week before trial for all unlawful detainer cases. The Court provides general oversight, and Legal Aid of Marin staff and Pro Bono volunteers recruited and trained by Legal Aid of Marin staff meet with unrepresented parties in each case (both landlords and tenants) and attempt to resolve the cases.</p> <p>When the parties are successful, they draft settlement agreements, signed by both parties, and present them to the Court. To date, over 87% of cases reached agreements - an excellent measure of the program's effectiveness.</p> <p>Agreements include tenancy preservation, case dismissal, rent forgiveness, and time to relocate. Even when tenants do move, having appropriate time and required funds, together with avoidance of an eviction judgment, go far to prevent immediate and future homelessness.</p> <p>The Partnership Grant affords Marin Superior Court and Legal Aid of Marin the opportunity to adapt this innovative, effective program to the COVID and post-COVID environment. The partners will employ alternative technologies to facilitate settlement conferences, and model protocols that take into account new local and state legal protections that emerge in response to the COVID pandemic and its aftermath.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Marin Superior Court	Civil	3501 Civic Center Dr.	12 to 4	16

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Supervising Attorney	0.18	0.09
	Pro Bono Director	0.3	0.15
	Staff Attorney	0.23	0.13
	Lawyers Total	0.71	0.37
Paralegals	Legal Assistant	0.28	0.2
		0	0
	Paralegals Total	0.28	0.2
Other	Operations Manager	0.04	0.03
		0	0

	Other Total	0.04	0.03
--	--------------------	------	------

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	0	0	0
Document Preparation and Review	0	20	150
Filing or Services Assistance	0	0	0
Supervised Settlement Services	0	20	150
Post-hearing Assistance	0	0	150
Other	0	0	0
Explain Other			

Community Engagement – Outreach	<p>Information about the mandatory settlement conference service is communicated by the Court in a notice to litigants. Legal Aid of Marin has developed deep connections with community-based organizations to exchange information about available services for landlord-tenant litigants. LAM regularly presents about landlord-tenant services through bilingual social media livecasts, written information on our website, recorded information, and bilingual presentations in collaboration with community partners including North Marin Community Services, Community Action Marin, West Marin Community Services, and local libraries and health clinics, among others.</p> <p>Legal Aid of Marin also operates community-based intake/outreach sites co-located at The Phoenix Project in Marin City – an area of high need and geographic isolation, and home to the majority of African American residents who live in the County. In 2021, we held 33 community-based intake sessions, which resulted in an increase in participation by African American litigants in the Community Court project. We also host weekly intake/outreach sessions co-located at Canal Alliance in the San Rafael Canal community - another area of high need and high poverty, home to many new immigrants. We work closely with area food banks and food distribution centers to exchange critical information about housing rights and available legal services.</p>
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	The services will be available to all unrepresented litigants. Our experience is that the overwhelming majority are indigent individuals, as defined by Business & Professions Code Section 6213.
Alternative Services	As all unrepresented parties will be eligible for services, referrals for ineligible participants are not anticipated at this time. However, litigants who can afford counsel will be referred to the San Francisco-Marin Lawyer Referral Service and urged to get counsel.

Court's Role	<p>During remote Court, the Court provides the Zoom site to host remote Mandatory Settlement Conferences, together with a list of settlement conferences scheduled. The Court Clerk provides Legal Aid of Marin staff with file information in advance of the Mandatory Settlement Conference (consistent with CCCP § 1161.2(a)(1)(B)).</p> <p>Legal Aid of Marin transmits the Court file to Pro Bono attorneys who help self-represented litigants negotiate resolution of their case. Legal Aid of Marin and the Court share data regarding settlement outcomes and other trends. Looking ahead to late 2022 and early 2023, Mandatory Settlement Conferences may resume in person.</p> <p>At this point, Legal Aid of Marin and the Court will evaluate the extent to which some these modified practices may continue to the extent they benefit Court processes and just outcomes, and will also evaluate the extent to which processes may be adapted to any other emergent needs (such as consumer debt collection cases).</p>
---------------------	--

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Aid Society of San Bernardino		
Project Name	CSEAJ - PROBATE PARTNERSHIP 2023		
Grant Year	Total Budget	Amount Requested	Amount Awarded
2023	\$174,912.00	\$159,000	
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse
No			
Project Abstract	<p>Legal Aid Society of San Bernardino (LASSB) will provide direct legal services to qualifying Pro Se litigants to resolve Small Estates, Conservatorship, and Guardianship actions. LASSB will use grant funds to help litigants reached through marketing efforts or court referrals. The project will not include legal advice. Provision of general information will eliminate establishing an attorney-client relationship to allow the project to assist all qualifying court patrons. LASSB will provide general information, review existing documents and prepare documents needed for case completion. The Court will refer litigants to the project and provide specific instructions on case document preparation in some cases. The Court will provide space, IT support, security, and janitorial services, ACIS access, and more.</p> <p>General information will include legal aspects and clarification of terms or conditions. LASSB will prepare corrected or missing pleadings, assist with pre-and post-hearing tasks, and provide procedural assistance to facilitate immediate filing and processing of their casework.</p> <p>Project services will be provided in English and Spanish, Mon.-Thur. 9 am-12:30 pm and 1:30 pm-4 pm within the Justice Center. Litigants will benefit by attaining information, securing missing or corrected pleadings, and completing required tasks. The project will allow efficient case processing, reduce the number of visits to the courthouse, and reduce litigants' confusion and stress. It will eliminate delays in resolving small estates and ensure disabled adults and beloved minors attain access to daily care and healthcare services despite being disabled or estranged from their parents. The project will reduce case backlog and the Court's administrative costs.</p>		
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours
Justice Center	Central	92415	Mon-Thurs
			Total Hours/Month
			9-Noon + 1:03-4PM

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Attorney	1	0.9
	Executive Director	0.01	0.01
		0	0
	Lawyers Total	1.01	0.91
Paralegals	Paralegal	2	2
	Intake/caseworker	0.17	0
	Paralegals Total	2.17	2
Other	ChiefAdm. (.01) & HR Asst (.15)	0.16	0.16
	ExeDir (admin .01), Database Mngr	0.01	0.01

	(.01)		
	Other Total	0.17	0.17

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		200	0	200
Document Preparation and Review		300	0	300
Filing or Services Assistance		300	0	200
Supervised Settlement Services		50	0	50
Post-hearing Assistance		0	0	0
Other		50	0	50
Explain Other	LASSB will endeavor to streamline the tasks necessary to link Small Estate litigants to Probate Examiner to effect evaluation and processing of Small Estate. We estimate that this service will be provided to at least 35 Small Estate litigants.			

Community Engagement – Outreach	CSEAJ services are promoted on the LASSB website, the Court's websites, on news releases, on flyers distributed by LASSB, the Court's Self-Help Centers, the Probate clerks and courts, and through various non-profit service agencies. Services will also be posted on https://www.lawhelpca.org and https://www.probono.net .
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	<p>All clients served through this project will first be screened for eligibility according to the State Bar's established Eligibility and Poverty-Income Guidelines issued each year by the State Bar, as more particularly defined in B&P Code, Section 6213(d).</p> <p>Clients served must:</p> <ol style="list-style-type: none"> 1) Seek to resolve a Small Estate Probate; or, 2) Be pursuing or seeking to pursue legal action regarding Probate Conservatorship or Guardianship actions within San Bernardino County; AND 3) Have a gross, household income within 125% of the current poverty threshold established by the U.S. Office of Management and Budget; or, 4) Be eligible for Supplemental Security Income or free services under the Older Americans Act or Developmentally Disabled Assistance Act. <p>It should be noted that if the client seeking services is disabled, their income shall be determined after deducting the costs of medical and other disability related special expenses.</p>

Alternative Services	<p>Clients who do not qualify for services through this project will be referred to our San Bernardino County Bar Association referral system, or if applicable, to the High Desert Bar Association, the West End Bar Association or the Riverside County Bar Association and to www.courts.ca.gov, www.lawhelpca.org, www.probono.net, www.Calegaladvocates.org. Inquiring clients who reside in such counties will also be provided information on the Bar Associations of Orange and Los Angeles County.</p> <p>Local Legal Aid organizations provide services to families who have a gross monthly income at or below HUD's annually published poverty-level, according to the State Bar's current eligibility chart, representing approximately 200% of HUD's annually published poverty-level. We have learned through past experience that providing referrals to such organizations merely frustrates those clients who do not financially qualify for services through this CSEAJ project.</p>
Court's Role	<p>The Court is providing: Parking, Permissive Use of a room next to the Probate Courtrooms of the San Bernardino Justice Center; Security service to access the space and protect staff and clientele; use of the Court's ACIS system to allow review of case file; use of a computer system complete with a software platform designed for efficient form preparation; use of a printer; open, continuing communication with the courtroom staff; open access to the clerk's staff; shared trainings; janitorial services.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Aid Society of San Diego			
Project Name	Name Change & Gender Change Self-Help Clinic			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$129,961.00	\$85,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No			Pending	
Project Abstract	<p>In partnership with the San Diego Superior Court, LASSD seeks funding to operate the Name Change & Gender Marker Change Self-Help Clinic in 2023. This project fills a gap in the San Diego County self-help services, as there are no other court-based projects providing services related to this substantive legal area. The aim of the project is to help indigent, self-represented litigants fully participate in the legal system when in need of a name and/or gender marker change by providing one-on-one assistance to participants, including document preparation and information on the court process. Providing services to self-represented litigants in this area will not only help and educate the litigants but will also help the court by cutting down on time spent by clerks and the court on litigants navigating the court process without assistance. The advent of the Real ID in California has increased the need for assistance with name changes. People who seek Real IDs discover that their documents do not match and need assistance obtaining a decree of name change in order to obtain the Real ID.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
San Diego Superior Court	Hall of Justice	330 W. Broadway, San Diego, CA 92101	MTWThF/8:30-3:30	140

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Staff Attorney	1	0.81
		0	0
		0	0
	Lawyers Total	1	0.81
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other		0	0
		0	0
	Other Total	0	0

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0

Information on Court Procedures and Hearing Preparation	0	0	0
Document Preparation and Review	0	0	0
Filing or Services Assistance	0	0	0
Supervised Settlement Services	0	0	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other			N/A

Community Engagement – Outreach	We communicate our services to the public through flyers at the courthouses, law libraries, and organizations serving our target populations. LASSD's hotline also receives over 90,000 calls a year and directs individuals to services such as this project. Many of our referrals also come directly from the court clerks and judicial officers. LASSD staff conduct community outreach presentations at senior centers, disability fairs, local schools, and other community organizations to inform the public of our services. LASSD's website, the San Diego Superior Court's website, and 211 (San Diego County's resource and information hotline and website for community services) also provide information on the Program and direct litigants to the clinic.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	Participants are screened for eligibility when they sign into the clinic. Each participant completes an application for services which inquires as to income, subject matter, and jurisdiction/geographic eligibility. Eligibility for partnership-funded project services require the litigant to be a San Diego County resident, income eligible, and requesting assistance with a name and/or gender marker change petition or objection.
Alternative Services	Those who are ineligible due to subject matter or jurisdiction/geographic eligibility will be referred to other clinics, service providers, the San Diego Law Library, and the San Diego County Bar Association's Lawyer Referral and Information System (LRIS). Those who are ineligible due to income will be assisted using self-help court funds or will be referred to the San Diego County Bar Association's LRIS.
Court's Role	The court provides a large office to LASSD where self-help services are provided. The court also provides security for the clinic in connection with the regular security the Sheriff's department provides at the courthouse. The court provides computers, printer/copiers, utilities, telephone services, and internet access with IT infrastructure to support secure, third-party internet access. The court also provides access to the courthouse to authorized LASSD personnel by providing a court badge. Finally, the court has provided protective barriers for use inside of the clinic during the pandemic.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Aid Society of San Diego			
Project Name	South Bay Restraining Order Project			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$175,539.00	\$120,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No			Pending	
Project Abstract	<p>In partnership with the San Diego Superior Court, the Legal Aid Society of San Diego (LASSD) Pro Bono Program seeks to offer a full-time Domestic Violence/Civil Harassment/Elder Abuse Restraining Order Clinic at the South County branch of the San Diego Superior Court. The Court has expressed the need for daily full-time services to assist the rising number of South County residents seeking protection from violence, stalking, sexual assault, elder/dependent adult abuse, and severe harassment. The project would operate daily in the South County Regional Center branch court from 8:30 a.m. to 12:00 p.m. and 12:30 p.m. to 4:00 p.m., Monday through Friday, providing assistance with court forms, explanation of the law, options and alternatives, and referrals.</p> <p>The program will be staffed with one staff attorney, one advocate, and volunteer attorneys and students. Ongoing communication with court personnel will create a collaborative program that benefits both the court and self-represented litigants in having appropriate paperwork processed efficiently.</p> <p>The main goals of the program are to help self-represented litigants access and fully participate in the legal system, and educate litigants so they can make informed choices resulting in effective and efficient filings for the litigant and the Court. Helping litigants complete necessary paperwork ensures that the Court receives the information necessary to render a decision on a temporary restraining order that day. By providing these services, the program helps pro per petitioners protect themselves from dangerous situations, and helps pro per respondents protect their due process rights by properly responding to petitions.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
San Diego Superior Court	South County	500 3rd Ave, Chula Vista, CA 91910	MTuWThF/8:30-12:00 and 12:30-4:00	140

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Staff Attorney	1	0.75
		0	0
		0	0
	Lawyers Total	1	0.75
Paralegals	Advocate	0.57	0.57
		0	0
	Paralegals Total	0.57	0.57
Other		0	0

		0	0
	Other Total	0	0

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		0	0	0
Document Preparation and Review		0	0	0
Filing or Services Assistance		0	0	0
Supervised Settlement Services		0	0	0
Post-hearing Assistance		0	0	0
Other		0	0	0
Explain Other	<p>The main project goal is to assist low-income, self-represented litigants understand the court process and complete necessary court documents to succeed in meritorious Domestic Violence, Civil Harassment, and Elder Abuse Restraining Order actions. A second goal is to see Program users have greater comfort in navigating the court system by assisting many in their own language with cultural competence. LASSD will utilize minority bar partners and volunteers to provide culturally appropriate assistance to those involved in restraining order actions in their own language. A third goal for the program to measurably ease the burden on Family and Civil/Elder restraining order judges and court personnel handling SRLs. A fourth goal is to provide meaningful referrals to free mediation services and other legal options. These other options can often provide a better result than a judge in a Civil Harassment restraining order case and can often settle tensions between litigants. A fifth goal is to engage the greater legal community in a meaningful way with the use of new technology. With the use of technology such as Zoom, the Program will be able to utilize more volunteers and provide assistance to more litigants. Utilizing technology such as Zoom can also assist a greater number of people, especially the elderly and those who are unable to access in person services.</p>			

Community Engagement – Outreach	Communication and continued partnerships with like-minded nonprofits throughout the County ensure that the community knows where to find the clinic and what services are offered. LASSD's Intake staff who answer almost 100,000 calls a year on LASSD's toll free numbers are trained to identify candidates for Self-Help Clinic services and will direct persons to the appropriate clinic on a case-by-case basis. The Court relies on clinic staff and volunteers to lighten their load and refers as many walk-ins as the clinic can handle each day, often encouraging litigants to come back another day if the clinic does not have time to assist them. LASSD also prints and distributes marketing materials on at least a quarterly basis, and provides information on clinic services on its website and 211 (San Diego County's resource and information hotline and website for community services). LASSD staff members also attend community events and participate in seminars and panels, devoted to serving this community and ensuring services are well-known and well-respected throughout San Diego County.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A

Income Eligibility Guidelines	Participants will be required to complete an application (intake form) before utilizing clinic services. These applications will be reviewed by staff prior to providing assistance to verify eligibility as to income, subject matter, and appropriate venue. Participants will also be screened to see if they have already retained counsel through questions on the intake form. If the individual indicates representation, the program staff or volunteers would further inquire as to the nature of representation and/or review the Register of Actions. If it is representation on another matter, the Program would be able to assist. If it is on the same/related matter, the Program would refer the individual back to their attorney of record.
Alternative Services	A litigant who is not eligible for project services would be referred to the San Diego County Bar Association's Lawyer Referral and Information System (LRIS) and the San Diego Law Library. Any litigants seeking different services outside of the project's scope, such as assistance with family law custody/visitation orders or divorce, would be referred to the Family Law Facilitator. Litigants seeking legal advice or representation will be referred to LRIS, LASSD's main line for client screening, and other organizations who provide legal advice and representation in restraining orders such as the San Diego Volunteer Lawyer Program, Center for Community Solutions, and Your Safe Place (formerly Family Justice Center). Litigants seeking additional family violence and support services would be referred to partner organizations such as South Bay Community Services.
Court's Role	<p>The court provides:</p> <ol style="list-style-type: none"> 1. A private office to LASSD where self-help services are provided during hours in which the courthouse is open. 2. Security for the clinic in connection with regular security provided at the courthouse. 3. Computers, copier, utilities, and some furniture. 4. Access to the courthouse to authorized LASSD personnel by providing a court badge. Additionally, the court provides badged access to the court mail room for LASSD personnel. 5. Telephones that will allow LASSD to make outgoing calls, both nationwide and long distance, to customer cell phones as well as internal court extension calls. 6. Plexiglass and other protective barriers for use inside of the clinic during the pandemic.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Aid Society of San Diego			
Project Name	South Bay Restraining Order Project			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$175,539.00	\$120,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No			Pending	
Project Abstract	<p>In partnership with the San Diego Superior Court, the Legal Aid Society of San Diego (LASSD) Pro Bono Program seeks to offer a full-time Domestic Violence/Civil Harassment/Elder Abuse Restraining Order Clinic at the South County branch of the San Diego Superior Court. The Court has expressed the need for daily full-time services to assist the rising number of South County residents seeking protection from violence, stalking, sexual assault, elder/dependent adult abuse, and severe harassment. The project would operate daily in the South County Regional Center branch court from 8:30 a.m. to 12:00 p.m. and 12:30 p.m. to 4:00 p.m., Monday through Friday, providing assistance with court forms, explanation of the law, options and alternatives, and referrals.</p> <p>The program will be staffed with one staff attorney, one advocate, and volunteer attorneys and students. Ongoing communication with court personnel will create a collaborative program that benefits both the court and self-represented litigants in having appropriate paperwork processed efficiently.</p> <p>The main goals of the program are to help self-represented litigants access and fully participate in the legal system, and educate litigants so they can make informed choices resulting in effective and efficient filings for the litigant and the Court. Helping litigants complete necessary paperwork ensures that the Court receives the information necessary to render a decision on a temporary restraining order that day. By providing these services, the program helps pro per petitioners protect themselves from dangerous situations, and helps pro per respondents protect their due process rights by properly responding to petitions.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
San Diego Superior Court	South County	500 3rd Ave, Chula Vista, CA 91910	MTuWThF/8:30-12:00 and 12:30-4:00	140

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Staff Attorney	1	0.75
		0	0
		0	0
	Lawyers Total	1	0.75
Paralegals	Advocate	0.57	0.57
		0	0
	Paralegals Total	0.57	0.57
Other		0	0

		0	0
	Other Total	0	0

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		0	0	0
Document Preparation and Review		0	0	0
Filing or Services Assistance		0	0	0
Supervised Settlement Services		0	0	0
Post-hearing Assistance		0	0	0
Other		0	0	0
Explain Other	<p>The main project goal is to assist low-income, self-represented litigants understand the court process and complete necessary court documents to succeed in meritorious Domestic Violence, Civil Harassment, and Elder Abuse Restraining Order actions. A second goal is to see Program users have greater comfort in navigating the court system by assisting many in their own language with cultural competence. LASSD will utilize minority bar partners and volunteers to provide culturally appropriate assistance to those involved in restraining order actions in their own language. A third goal for the program to measurably ease the burden on Family and Civil/Elder restraining order judges and court personnel handling SRLs. A fourth goal is to provide meaningful referrals to free mediation services and other legal options. These other options can often provide a better result than a judge in a Civil Harassment restraining order case and can often settle tensions between litigants. A fifth goal is to engage the greater legal community in a meaningful way with the use of new technology. With the use of technology such as Zoom, the Program will be able to utilize more volunteers and provide assistance to more litigants. Utilizing technology such as Zoom can also assist a greater number of people, especially the elderly and those who are unable to access in person services.</p>			

Community Engagement – Outreach	Communication and continued partnerships with like-minded nonprofits throughout the County ensure that the community knows where to find the clinic and what services are offered. LASSD's Intake staff who answer almost 100,000 calls a year on LASSD's toll free numbers are trained to identify candidates for Self-Help Clinic services and will direct persons to the appropriate clinic on a case-by-case basis. The Court relies on clinic staff and volunteers to lighten their load and refers as many walk-ins as the clinic can handle each day, often encouraging litigants to come back another day if the clinic does not have time to assist them. LASSD also prints and distributes marketing materials on at least a quarterly basis, and provides information on clinic services on its website and 211 (San Diego County's resource and information hotline and website for community services). LASSD staff members also attend community events and participate in seminars and panels, devoted to serving this community and ensuring services are well-known and well-respected throughout San Diego County.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A

Income Eligibility Guidelines	Participants will be required to complete an application (intake form) before utilizing clinic services. These applications will be reviewed by staff prior to providing assistance to verify eligibility as to income, subject matter, and appropriate venue. Participants will also be screened to see if they have already retained counsel through questions on the intake form. If the individual indicates representation, the program staff or volunteers would further inquire as to the nature of representation and/or review the Register of Actions. If it is representation on another matter, the Program would be able to assist. If it is on the same/related matter, the Program would refer the individual back to their attorney of record.
Alternative Services	A litigant who is not eligible for project services would be referred to the San Diego County Bar Association's Lawyer Referral and Information System (LRIS) and the San Diego Law Library. Any litigants seeking different services outside of the project's scope, such as assistance with family law custody/visitation orders or divorce, would be referred to the Family Law Facilitator. Litigants seeking legal advice or representation will be referred to LRIS, LASSD's main line for client screening, and other organizations who provide legal advice and representation in restraining orders such as the San Diego Volunteer Lawyer Program, Center for Community Solutions, and Your Safe Place (formerly Family Justice Center). Litigants seeking additional family violence and support services would be referred to partner organizations such as South Bay Community Services.
Court's Role	<p>The court provides:</p> <ol style="list-style-type: none"> 1. A private office to LASSD where self-help services are provided during hours in which the courthouse is open. 2. Security for the clinic in connection with regular security provided at the courthouse. 3. Computers, copier, utilities, and some furniture. 4. Access to the courthouse to authorized LASSD personnel by providing a court badge. Additionally, the court provides badged access to the court mail room for LASSD personnel. 5. Telephones that will allow LASSD to make outgoing calls, both nationwide and long distance, to customer cell phones as well as internal court extension calls. 6. Plexiglass and other protective barriers for use inside of the clinic during the pandemic.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Assistance for Seniors			
Project Name	Partnership to Assist Guardianship Litigants			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$60,421.00	\$55,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>The Partnership to Assist Guardianship Litigants is a collaborative effort of Legal Assistance for Seniors (LAS), Legal Access Alameda of the Alameda County Bar Association (LAA) and the Alameda County Superior Court. The Partnership will provide legal assistance to low income, pro per litigants in guardianship cases. Partners will assist with all aspects of these cases including temporary petitions, general petitions, objections, adding or removing co-guardians, petitions for visitation and petitions for termination. The partners will develop sample documents and instructions designed to fill in any potential gaps caused by the reduction in court services, including reduced filing hours and the elimination of Probate Examiner phone hours. The Partnership will hold weekly workshops to assist with filing requirements. One of the weekly workshops will be dedicated to the complex notice requirements that often result in continuances for the litigants. We will also incorporate lessons learned during COVID and may provide one of the workshops remotely for litigants unable to travel to the courthouse. LAA volunteers and LAS will provide day of court assistance when the pro per cases are calendared. The day of court assistance includes explaining the procedural deficiencies keeping the cases from being heard, providing forms allowing the litigants to draft declarations to address the procedural issues and assisting with filing documents. The goal of this program is to navigate litigants through the complex procedural process required in guardianship cases, providing low income litigants access to justice while also reducing continuances and preserving court resources.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Alameda County Superior Court	Self Help Center	661 Washington St., Oakland, CA	Monday 1:30-4	6
Alameda County Superior Court	Berkeley Courthouse	2120 Martin Luther King Jr. Way, Berkeley, CA	as needed	as needed

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Legal Director	0.01	0.01
	2 Supervising attorneys	0.13	0.13
		0	0
	Lawyers Total	0.14	0.14
Paralegals	Advocate	0.5	0.5
		0	0
	Paralegals Total	0.5	0.5
Other	Exec. Dir & Admin Asst/intake	0.02	0.02

	Assoc. Dir, Tech. Specialist, Admin Asst/Reception	0	0
	Other Total	0.02	0.02

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		170	26	80
Document Preparation and Review		170	26	80
Filing or Services Assistance		100	26	80
Supervised Settlement Services		50	26	80
Post-hearing Assistance		0	0	0
Other		100	0	0
Explain Other	In order to provide quality services, the partners spend a lot of time reviewing changes to the local rules and procedures made throughout the year. During the pandemic, we have been reaching out to litigants after assisting them with their procedural issues to make sure they understand how to appear virtually and have the proper log-in information. Our goal is to not only assist the litigants with proper filings but to make sure their matters are heard and they have proper access to justice. We also often field calls from family members who we can't count for our service numbers but we still provide information about how to attend the hearings.			

Community Engagement – Outreach	The availability of these services will be communicated to litigants and the community in multiple ways across several formats. The Probate Court staff (clerks, probate examiners, court investigators, Judges) are familiar with this partnership and the partners make sure to provide them updated information about the services to share with litigants. The Court Investigators often recommend that any proper litigant who has filed paperwork should contact Self Help or LAS for assistance with procedural issues. There is also a flyer that has been translated into multiple languages that is distributed at various courthouses and other locations around Alameda County. All the websites of the partners members (LAS, LAA and Self-Help) have information about the services. All the partners take calls directly from the community and all the staff are trained to identify and refer anyone who would qualify for services. The partnership has a wide range of community partners and contacts, and use that network to make sure that anyone who qualifies has the information they need to take advantage of the services provided. We make sure that East Bay Children's Law Offices, the agency appointed to represent the minors in many of these cases has information about the program and they often refer litigants. The partners have also increased their outreach to agencies that provide housing services so they are aware that the Partnership can assist litigants who need a guardianship to maintain their housing.
Attorney-Client Relationship	Yes

Conflict of Interest Protocols	The Self-Help staff and LAA volunteers will not establish an attorney-client relationship. LAS attorneys may agree to establish an attorney-client relationship and represent a pro per litigant from this project if the litigant is over the age of 50, their case is complicated or the litigant needs additional assistance. LAS staff performs a conflict check prior to assisting any litigant through this project. If there is a conflict, the litigant is assisted by Self Help Staff or a LAA volunteer.
Income Eligibility Guidelines	<p>The litigants are screened for subject matter and residence eligibility when they contact any of the partners for assistance, meaning the litigant must be preparing to file a guardianship petition, or already has a pending guardianship matter, in Alameda County probate court. The petition may be to obtain a guardianship, for visitation, or to modify, object to, or terminate a guardianship. The litigant must also be unrepresented. Screening questions are given during the first point of contact with one of the partners, when a potential workshop participant calls to inquire or reserve a space in the workshop.</p> <p>Currently, there are no income restrictions officially stated for the workshop and clinic. If the volume of the work provided by the project became unmanageable and persons needed to be turned away from the workshop or clinic, the restriction placed on eligibility would be income based. During our work together, we have found that most the litigants seeking assistance through this program are low income so ineligibility due to income has not been an issue. If there is a conflict, the project has the ability to refer litigants to another partnering agency or to outside organizations should the matter require more complex assistance. Individual litigant information is not shared between the partners except for identification so a conflict determination can be made. LAS includes income information in our client database used to run reports for our finance department in order to insure that Partnership Funds are only used to assist indigent clients.</p>
Alternative Services	If the litigants are ineligible due to subject matter or residency, the partners will attempt to find appropriate referrals. The most common type of the request that cannot be met are concerns about a child's care and safety not in the care of the potential guardian. A referral to Department of Family and Children Services or to local law enforcement may be appropriate rather than a referral to another legal organization. We also refer litigants seeking guardianship of the estate to the private bar. Litigants who do not qualify for eligibility because of their income may still be assisted by the Self Help Center as their services may not be income based. Those litigants are also referred to the private bar. Litigants who would like to be represented in their matter who do not otherwise meet LAS' service requirements are referred to the private bar.

Court's Role	<p>The Court's Self Help Center is currently closed to the public but the goal is to return to the space at the Self Help Center in the Wiley Manuel Courthouse for bi-weekly workshops. The court will provide access to a copier. Guardianship hearings in Alameda County are currently held remotely over Zoom. The Partners are piloting a workshop targeted to assist litigants with their procedural issues prior to their hearing. If the hearings remain remote, the Partners plan to provide day of court assistance in break-out rooms. If the hearings return to in-person, the court will provide a room at the Berkeley Courthouse for the day of court assistance and access to a copier. The court has also provided LAS attorneys with the ability to access non-confidential court filings that could previously only be viewed on computers located at the courthouses. This allows LAS attorneys to review filed documents in order to assist litigants clear up any procedural issues. It is also extremely helpful when assisting the litigants with draft orders and the letters that must be filed after the order is granted.</p>
---------------------	---

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Legal Services of Northern California			
Project Name	Yolo Consumer Clinic			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$39,000.00	\$39,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>Legal Services of Northern California's Yolo County office (LSNC) and the Yolo County Superior Court propose to provide a free Consumer Clinic for low income people to address the rise in consumer lawsuits exacerbated by the pandemic. The Clinic is targeted at the 48,465 Yolo County residents living below 125 percent of the federal poverty level, with a focus on serving low-income litigants with language, literacy, or technology barriers. These groups need free legal assistance in consumer cases because they have difficulty accessing the Court and have been hardest hit by the economic crisis caused by the pandemic. Of the estimated 220,500 people who live in Yolo County, 38 percent speak English less than "very well," 20.8 percent speak only Spanish, and 7.7 percent lack basic literacy skills. 2,638 people in Yolo County reside in rural areas with limited internet services and broadband speed rates substantially below the California standard. The project is unique to the region and will ensure that all consumer litigants have equal access to the Court.</p> <p>LSNC's Yolo staff attorneys will rotate providing twice-a-week one-on-one legal assistance in consumer law cases through a 20 percent full time equivalent position. LSNC will also offer mediation during the small claims court calendar, with a focus on pandemic rental debt and collection cases. The project will assist with the unmet need for pro per legal assistance in consumer law cases, reduce court clerk time spent with self-represented litigants, and promote judicial economy.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Yolo Superior Court		1000 Main Street, Woodland, CA	M 8:30-10:30 & 1:30-3:30-mediation/TTh 8:30-12:00-one-on-one appointments	50

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Managing Attorney	0.03	0.03
	Staff Attorney	0.3	0.3
		0	0
	Lawyers Total	0.33	0.33
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other		0	0
		0	0
	Other Total	0	0

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		144	0	0
Document Preparation and Review		144	0	0
Filing or Services Assistance		85	0	0
Supervised Settlement Services		40	0	0
Post-hearing Assistance		0	0	0
Other		25	0	0
Explain Other	The "other" individual services represents mediation in 52 cases during the small claims court calendar, focusing on pandemic rental debt and collection cases. The goals for mediation are to ensure that the parties reach a mutually acceptable resolution and to preserve judicial economy by diverting cases from the trial calendar. The overall goals of one-on-one assistance are to ensure that self-represented litigants in consumer cases related to the pandemic file the correct paperwork, understand the court procedures and substantive area of the law, receive information about their legal options, are prepared to represent themselves at court, and receive appropriate referrals.			

Community Engagement – Outreach	Project staff will provide flyers to Court Clerks describing the availability of services. Project staff will also distribute bilingual (English/Spanish) flyers at the kiosk at the Self-Help Center, at the law library, and at community-based organizations that serve the target population. LSNC staff also attends numerous meetings throughout the county with other service providers, where staff have the opportunity to share information about LSNC's services, including the project. Project staff will also attend outreach events, either remotely or in person, like the annual Yolo County Fraud Fair, Senior Resource Fairs, and farmworker outreach events, where staff are able to distribute flyers concerning the project.
Attorney-Client Relationship	Yes
Conflict of Interest Protocols	a. LSNC will establish an attorney-client relationship with participants who receive one-on-one legal assistance. LSNC-Yolo uses a secure, web-based case management system, Justice Server. Staff will enter potential clients' names into Justice Server to check for conflicts before the potential client receives one-on-one services from the project. If a conflict arises, project staff will refer the conflicted-out person to the Yolo County Bar Association web site, which lists attorneys by practice area. Project staff will also refer individuals for whom a conflict is identified to the Court's Self Help Center. It is expected that conflicts will be unusual because the Consumer Clinic assists low-income litigants with consumer issues that are typically brought by corporate entities, which must be represented by counsel.

Income Eligibility Guidelines	<p>The project attorneys are ultimately responsible for screening potential project clients. LSNC deems litigants ineligible for services if they do not meet the indigency requirements outlined in Business and Professions Code Section 6213(d), if they need assistance in a subject matter that the Consumer Clinic does not cover, and/or if they do not meet residency requirements. The project's administrative staff conduct an initial screening for eligibility for the one-on-one appointments. Potential clients self-report income, assets, age, and if they have a developmental disability, which staff note on the intake sheet. LSNC uses Justice Server, a secure, web-based Salesforce platform, for capturing data and screening for eligibility. The project attorneys then review the intake information in Justice Server to determine whether the potential client is eligible for project services. Project staff will screen people referred for small claims mediation using either a sign in sheet through which participants self-report eligibility information at the courthouse or through a link via Zoom, if the Court is not holding in person small claims trials in 2023.</p>
Alternative Services	<p>Project staff will provide any handouts generated by the project, including the handout on answering consumer debt lawsuits in Yolo County, to litigants who are not eligible for the project's services. Staff will also refer ineligible individuals to the Court's Self-Help Center, co-located with the project staff at the Courthouse site (when services are in person), and to the Yolo County Bar Association's web site listing attorneys by practice area.</p>
Court's Role	<p>If the Court's Self-Help Center is open for in-person services by partner agencies in 2023, the Court will provide in-kind space in the workshop room for project services, in-kind security services, in-kind use of the copier and workshop room computers, general oversight of project staff while they are at the courthouse site, and an in-kind waiting area for project clients and participants. The Court will also provide data, as needed and available, to the managing attorney for use in assessing the quality and impact of the project's services.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Neighborhood Legal Services			
Project Name	PASADENA - CONTINUUM OF SERVICES			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$160,512.00	\$115,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>Neighborhood Legal Services of Los Angeles County ("NLSLA") proposes to continue its project in the Pasadena Courthouse to maintain assistance with UD Answers and serve as a triage on cases that should be placed on the continuum of services for the San Gabriel Valley. The California Governor has made Housing the State's number one priority and has called on all leaders – both state and local to provide critical services, including homelessness prevention efforts. Both the County and City of Los Angeles visualized a Right to Counsel project. As the first steps towards this Right to Counsel effort, the joint powers partnered with legal aid organizations to create Stay Housed L.A, a robust eviction and homelessness prevention effort. This project brings much needed tenant defense resources to the community.</p> <p>Unfortunately, the need is great and even with the Stay Housed L.A. resources, they simply cannot meet the need and provide assistance to all tenants presenting with eviction cases at the Pasadena Courthouse. The Unlawful Detainer (UD) process is an expedited one and it is difficult to meet the needs of the numerous tenants presenting who must file an Answer to the UD especially given the quick five-day response deadline under the statute. To fill the gap in services, it is essential to fund an attorney from NLSLA to help maintain the continuum of services for housing cases at the Pasadena Resource Center for at least four days a week, 8:30 am to 4:00 pm.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
LASC	Pasadena	300 E. Walnut, 3rd Floor, Pasadena, CA 91101	M-Th 8:30 - 12:00 and 1:00 pm - 4:00 pm	121

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Director of Access to Justice Initiatives	0.05	0
	Associate Supervising Attorney	0.05	0
	Attorney	1	1
	Lawyers Total	1.1	1
Paralegals	Access to Justice Coordinator	0.05	0
		0	0
	Paralegals Total	0.05	0
Other	Secretary	0.15	0.15
		0	0
	Other Total	0.15	0.15

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		6000	36	180
Document Preparation and Review		6000	36	180
Filing or Services Assistance		6000	0	0
Supervised Settlement Services		6000	0	0
Post-hearing Assistance		0	0	0
Other		0	0	0
Explain Other	Another goal of the project is to create comprehensive training materials for volunteers and JusticeCorps members interested in assisting tenants with housing issues. The project will also create user-friendly informational brochures to educate the litigants about their rights.			

Community Engagement – Outreach	NLSLA will provide informational flyers to LASC staff, Justice Partners, and Community based organizations to inform them of the availability of the assistance at the Pasadena Resource Center. Additionally, we will list the services on LASC's and NLSLA's websites. Additionally, we will leverage other legal websites like LAAC's CAlegaladvocates.org, Stay Housed L.A. and other such resources.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	<p>All litigants are asked to fill out an intake form, modeled after the form used which includes a non-verified self-declaration of income level. All litigants assisted through this grant are deemed indigent as is required. The Center also serves non-indigent litigants as is required by the Court and the County who funds the service. The Court feels very strongly that all users of the Court should be able to benefit from the assistance provided at a Court-based self-help center. Historically, most users of NLSLA's Self-Help Centers (91%) are at or below the poverty line and are LSC eligible to receive free legal services.</p> <p>All litigants will be interviewed by the Intake Paralegal to determine if they meet the subject- matter eligibility. If not, the individual will be given the appropriate referral.</p>

Alternative Services	<p>The primary objective of the NLSLA Self-Help Center is, whenever feasible, to provide people access to direct legal representation through existing programs and providers in the Community. In addition, when an issue can be effectively addressed through other non-legal resources, staff will refer litigants to these social services programs as well.</p> <p>NLSLA has developed a list of referrals for a variety of legal matters not covered at the Self- Help Center such as bankruptcy and immigration matters. When feasible, litigants are referred to NLSLA itself. Other referrals include other non-profit legal agencies and the bar association lawyer referral services. No referrals are made directly to individual private attorneys. NLSLA believes that a continuum of services can be achieved by appropriate referrals and collaboration.</p>
Court's Role	<p>The Pasadena Courthouse will house the Housing Continuum of Services Project. Currently, the Pasadena Resource Center's space, designed for self-help services, is on the 3rd floor and meets all ADA and city code requirement. The facility was renovated in 2019, shortly before the COVID-19 pandemic, to produce open seating and to upgrade technology to promote the smooth and efficient delivery of legal services to the public. Litigants may also access an Unlawful Detainer Answer WebEx workshop via the public computers in each self-help center. The JusticeCorps Fellows are available to provide any technical assistance needed to the litigant on site or using WebEx. To meet the needs of Los Angeles' diverse population, all of the information available in the workshops is in English, Armenian, Chinese, and Spanish. NLSLA will produce materials in other languages as needed. This center will also rely on the diverse NLSLA and Court staff, volunteers, and JusticeCorps members for interpreter services. In addition to these resources, NLSLA and the Court both contract with Language Line to provide translation services to the Self-Help Center staff, . NLSLA continues to ensure its staff is culturally sensitive and competent in all of the services it provides to the community.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Neighborhood Legal Services			
Project Name	POMONA - READY FOR TRIAL!			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$166,262.00	\$120,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>NLSLA proposes its "Intensive Family Law Trial Preparation" called "Ready for Trial!" project to support self-represented litigants in family law cases. NLSLA will hire a lawyer who will provide trial preparation workshop and clinic out of the Pomona Courthouse which will consist of two parts. The first clinic will educate and assist individuals in completing their trial brief and other trial forms. The second part of the workshop will aim at familiarizing a litigant with what a trial day looks like by walking them through check in and the basics on where to stand and how to address the court. A Spanish version of the workshop will be provided where issues like presenting evidence in a different language and working with court interpreters will be addressed. The project hopes to create a video that captures what a day at family court trial look like that can be easily shared across the county. The goal of the project is to demystify and remove the anxiety and stress litigants face when going to trial. The hope is that litigants will leave the workshops and clinics with confidence in their own ability to represent themselves in court.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Los Angeles Superior Court	Pomona	400 Civic Center Plaza, Pomona, CA 91766	M-Th 8:30 - 12:00 and 1:00 pm - 4:00 pm Fridays from 8:30 - noon	151.55

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Director of Access to Justice Initiatives	0.05	0
	Associate Supervising Attorney	0.05	0
	Attorney	1	1
	Lawyers Total	1.1	1
Paralegals	Access to Justice Coordinator	0.05	0
		0	0
	Paralegals Total	0.05	0
Other	Secretary	0.15	0.15
		0	0
	Other Total	0.15	0.15

Goals and Objectives			
	Number of Individual	Number of Workshops	Individuals to be Served at Workshops/Group Activities

	Services		
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	0	80	400
Document Preparation and Review	0	80	400
Filing or Services Assistance	0	0	0
Supervised Settlement Services	0	0	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other			

Community Engagement – Outreach	NLSLA will provide informational flyers to Court staff, Justice partners and community-based organizations to inform them of the assistance available to self-represented litigants at the Pomona Courthouse with upcoming family law trials (Paternity and Divorce). Additionally, we will list the services on LASC's and NLSLA's websites. In addition, we will leverage other legal websites like LAAC's CAlegaladvocates.org .
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	All litigants are asked to fill out an intake form modeled after the form used by the other SHLACs supervised by NLSLA - which includes a self-declaration of income level. All litigants assisted through this grant are indigent as is required by the Legal Services Trust Fund; however this Center will serve all litigants regardless of income as is required of NLSLA by the Court. The Court feels that all users of the Court should be able to benefit from the assistance provided at a court based self-help center. Most users of the Self-Help Centers operated by NLSLA are at or below the poverty line and are LSC eligible to receive free legal services. All litigants that visit the Center will be triaged by the Intake Paralegal to determine if they meet the subject-matter eligibility. If not, the individual will be given the appropriate referral.
Alternative Services	As we are providing self-help services, both sides of a family law and housing matter can receive assistance at the Pomona Center. NLSLA is currently lead in a County project funding the 9 Self-Help Centers. Because self-help services will be provided under this project, all parties on a case will be able to receive assistance. However, litigants who are represented will be ineligible for the project's services. If self-represented litigants ask for services beyond self-help, including legal advice and/or legal representation, they will be provided with referral(s) to other legal service agencies and/or bar association lawyer referral services. If the litigant needs self-help services beyond the scope of the project, a referral to another self-help service - either in-person or remote - will be provided

Court's Role	<p>The Court provides space in the Self-Help Center located on the 7th Floor of the Pomona Courthouse. Recently, the Court re-furbished the first floor workshop space, which will be used by the team for the Ready for Trial! project. The services will be provided during Courthouse hours of operation; therefore no special access will be needed. NLSLA will provide the staffing for the project, materials to be used during the workshop, the curriculum and any volunteers that may be needed as the project is rolled out. This project will also leverage the diverse NLSLA and Court staff, volunteers, and JusticeCorps members for interpreter services. In addition to these resources, NLSLA and the Court both contract with Language Line to provide translation and interpretation services.</p>
---------------------	---

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Neighborhood Legal Services			
Project Name	San Gabriel Valley - Remote Services - Housing			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$169,351.00	\$124,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>NLSLA will expand its partnership with the Superior Court of California, County of Los Angeles ("Court") to support vulnerable self-represented litigants in the underserved geographic area of the San Gabriel Valley. Specifically, the project will focus on providing housing assistance via remote technology to residents living in Glendale, Pomona, and West Covina - areas with limited access to Self Help housing services, especially with many Stay-Housed providers currently overwhelmed. The team would assist litigants with education and information on how to navigate the Unlawful Detainer ("UD") process for pre-UD matters such as Reasonable Accommodation letters, illegal lockout letters, harassment complaints, and habitability requests. It will also hold monthly virtual workshops to provide additional guidance for tenants and/or landlords on topics such as the post-judgement process. Additionally, this project will work with the Court to promote and develop an array of web-based tools and interactive materials to educate the public on these and other collaterally related housing issues for community members throughout Los Angeles County. The project will be conducted remotely collaborating with the Self-Help Legal Access Centers ("SHLAC"). The hours of operation will be during SHLAC operating hours. The project's staffing will include NLSLA supervising attorney, staff attorney, support staff, and volunteers. The remote team under this project will work closely with staff on-site at the courthouses and provide technical assistance to the Court and SHLAC staff as needed. The Court's participation will include identifying and referring litigants. Moreover, the Court will play a vital role in evaluating the services.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Los Angeles Superior Court		Virtual - Remote Services	M-Th 8:30 - 12:00 and 1:00 pm - 4:00 pm Fridays from 8:30 - noon , 1-2	132

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Associate Supervising Attorney	0.1	0
	Attorney	0.5	0.5
		0	0
	Lawyers Total	0.6	0.5
Paralegals	Paralegal	1	1
	Housing Coordinator	0.05	0
	Paralegals Total	1.05	1
Other	Secretary	0.1	0.1
		0	0

	Other Total	0.1	0.1
--	--------------------	-----	-----

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options				
Information on Court Procedures and Hearing Preparation				
Document Preparation and Review				
Filing or Services Assistance				
Supervised Settlement Services				
Post-hearing Assistance				
Other				
Explain Other	NLSLA anticipates that 350 litigants will view pre-recorded web-based videos that provide general information regarding popular housing topics such as Notices and navigating the eviction process.			

Community Engagement – Outreach	NLSLA will provide informational flyers to Court staff, Justice Partners, and community based organizations to inform them of the project and the availability of remote assistance for San Gabriel Valley self-represented litigants experiencing housing issues. Additionally, NLSLA will list the services on the Court website and NLSLA website, along with other legal websites such as CAllegaldvocates.org and other such resources. NLSLA will conduct outreach by hosting Know Your Rights workshops with community organizations to increase awareness of the project, engage in meetings with the LA Tenants Union, KTown for All, LA Community Entry Services, and the Los Angeles Homeless Services Authority ("LAHSA"). NLSLA will utilize these connections to further build relationships with other community service organizations that are providing resources to the vulnerable or unhoused to raise awareness about the project and its service offerings. These relationships will also allow the project to get materials and flyers out to different segments of the community.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	This project will target serving indigent, self-represented litigants in housing matters. All litigants would need to complete an initial intake that requires information about the total household income and a self-declaration of income level, as well as their residency. An intake screener would do an initial screening of all participants to assess whether they meet the eligibility guidelines required for service: indigent with a focus on those who reside in the San Gabriel Valley areas. Approximately 95% of litigants who are served by the Self-Help Legal Access Centers operated by NLSLA are at or below the poverty level and are Legal Services Corporation ("LSC") eligible to receive free legal services. All litigants will be interviewed by the intake paralegal to determine if they meet the subject-matter eligibility. If not, the litigant will be provided appropriate referrals.

Alternative Services	<p>NLSLA is currently a part of several comprehensive housing collaboratives uniquely designed to address housing needs associated with vulnerable tenants that are homeless or at risk of becoming homeless, facing challenges arising out of physical/mental health disability, served with an unlawful detainer or post-judgement action, and/or require advocacy as a result of their status as a mobile home park owner. If a litigant is ineligible for services under this project, staff will be trained to re-direct them to one of our partner agencies for additional or higher-level assistance, a court Self-Help Legal Access Center, other local legal service providers, government agencies, and/or a bar association lawyer referral service. Because self-help services will be provided under this project, all parties on a case will be able to receive assistance. However, litigants who are represented will be ineligible for the project's services. If self-represented litigants ask for services beyond self-help, including legal advice and/or legal representation, they will be provided with referral(s) to other legal service agencies and/or bar association lawyer referral services. If the litigant needs self-help services beyond the scope of the project, a referral to another self-help service - either in-person or remote - will be provided.</p>
Court's Role	<p>Project staff will be partnering with Mosk's Courthouse's self-help center, located at 111 N. Hill Street, RM 115, Los Angeles, CA 90012. While Project services to SGV litigants will be delivered virtually, cooperation will allow NLSLA and the Court to leverage its current infrastructure to support, train and work closely with the Project team to ensure that the project is successful and the varying needs that arise are met. NLSLA will not require a separate or additional office space within the Court for this Project. However, NLSLA will need to work with the Court's IT Department to create links that would be housed on the Court's website to directly connect litigants to the project's content and resources on a separate platform. This would help the project to track referrals from the Court, number of viewers accessing the various resources provided, and viewer satisfaction for outcome reporting. NLSLA's expansion would also require dedicated staff and/or clerk representatives in the four (4) expansion courthouses to help facilitate referrals, provide case information, and/or work with NLSLA staff to address unique issues or special accommodation requests that may arise with litigants who have a disability, limited mobility, or limited access to technology. NLSLA will furnish all necessary equipment, as well as absorb the cost of supplies.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Neighborhood Legal Services			
Project Name	STABILIZING FAMILIES PROJECT			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$145,125.00	\$105,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>NLSLA aims to continue the “Stabilizing Families” project to support self-represented litigants through the Probate Guardianship process. This will include education on alternative options, document preparation, service requirements, clearing probate notes, and preparing Letters and Orders. This advocacy will provide an option to litigants, who otherwise cannot afford legal representation throughout the long process of probate guardianship, which is focused on empowerment and education. The program will provide assistance to litigants seeking information and support to obtain, object to, or terminate a legal guardianship, with resources and support offered at all stages.</p> <p>The program will operate in conjunction with the Self-Help hours of operation: 8:30am – 4:30pm. An NLSLA attorney will rotate between the Antelope Valley and Van Nuys courthouses, to offer both remote and on-site support to litigants. Following the Self-Help model, there will be no attorney-client relationship between the staff attorney, no court appearances, and no legal advice will be provided to litigants. The program’s main goals are to alleviate the confusion with probate guardianships through targeted education and provide assistance to litigants who are navigating their ways through process.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
LASC	Antelope Valley	42011 4th St. West, Lancaster, CA 93534	M-Th 8:30 - 12:00 and 1:00 pm - 4:00 pm Fridays from 8:30 - noon	151.55
LASC	Van Nuys	Remote Services	same hours	

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Director of Access to Justice Initiatives	0.05	0
	Associate Supervising Attorney	0.05	0
	Attorney	1	1
	Lawyers Total	1.1	1
Paralegals	Access to Justice Coordinator	0.05	0
		0	0
	Paralegals Total	0.05	0
Other	Secretary	0.15	0.15
		0	0
	Other Total	0.15	0.15

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	1000	124	1000
Document Preparation and Review	1000	124	1000
Filing or Services Assistance	1000	0	0
Supervised Settlement Services	1000	0	0
Post-hearing Assistance	0	0	0
Other	100	0	0
Explain Other			

Community Engagement – Outreach	<p>Much of the outreach for the program will be done on-site at the various Self-Help centers throughout Los Angeles County. Self-represented litigants who are navigating their ways through the Probate Guardianship system have historically been referred by court staff to seek information and support through Self-Help. This is an amazing way to be connected to litigants at all stages, who are still considering guardianships, beginning the process, or litigants who are experiencing obstacles postponing final orders. Some litigants will come to the self-help center without the language of “guardianship” and on-site or remote triage is a great way to educate litigants about the most preliminary information about their options.</p> <p>In order to inform the community at large about our services, we will be doing off-site outreach to local schools and family-based organizations and provide information about what services Self-Help can provide, namely, but not limited to, Probate Guardianships. Additionally, the program is building its resource material, which will be accessible through the NLSLA website for litigants with internet accessibility, providing general information and program services for those doing initial research about their situation.</p> <p>Finally, as the program expands, we will continue to inform our community partners about the services we provide. This will widen our net by inter-organizational referrals to help us reach litigants who would not otherwise know to contact us for Probate Guardianships.</p>
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A

Income Eligibility Guidelines	<p>All litigants are asked to fill out an intake form modeled after the form used by the other SHLACs supervised by NLSLA - which includes a non-verified self-declaration of income level. All litigants assisted through this grant are indigent as is required; however this Center also serves all litigants regardless of income as is required by the LASC and the County who funds the service. The Court feels very strongly that all users of the Court should be able to benefit from the assistance provided at a court based self-help center. Most users of the Self-Help Centers (91%) operated by NLSLA are at or below the poverty line and are LSC eligible to receive free legal services.</p> <p>All litigants will be interviewed by the Intake Paralegal to determine if they meet the subject- matter eligibility. If not, the individual will be given the appropriate referral.</p>
Alternative Services	<p>NLSLA has developed a list of referrals for a variety of legal matters not covered at the Self- Help Center such as bankruptcy and immigration matters. When feasible, litigants are referred to NLSLA itself. Other referrals include other non-profit legal agencies and the bar association lawyer referral services. No referrals are made directly to individual private attorneys. NLSLA believes that a continuum of services can be achieved by appropriate referrals and collaboration</p>
Court's Role	<p>The project will be co-located at the Antelope Valley Courthouse, located at 42011 4th St. West, Room 3700, Lancaster, CA 93534, as part of an existing self-help center. NLSLA will use space in the workshop area at the Courthouse to conduct the educational workshops and provide the services. NLSLA will furnish all necessary equipment, as well as absorb the cost of supplies.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Public Law Center		
Project Name	DeFacto & Adoptive Parent Assistance Project		
Grant Year	Total Budget	Amount Requested	Amount Awarded
2023	\$59,178.00	\$50,000	
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse
No			
Project Abstract	<p>The Orange County Superior Court sought a project partner to support adoptive parents in Juvenile Court proceedings, so the Court can use limited funds for contract attorneys for minor/parent representation. Without this project (and the complementary pro bono placement services PLC's Family Law Unit provides), de facto parents in Dependency Court termination of parental rights proceedings are at risk of becoming the only parties unrepresented by counsel. De facto parents often become adoptive parents and likewise could go through that process without counsel. PLC's DeFacto & Adoptive Parent Assistance Project provides guidance and resources to unrepresented de facto parents and adoptive parents. Where appropriate, the Project also informs litigants about the benefits and options for finding pro bono counsel. When appropriate, participants will be referred out of the Project to PLC's Family Law Unit for placement with trained pro bono counsel.</p>		
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours
Orange County Superior Court	Lamoreaux Justice Center	341 The City Drive S., Orange, CA	Tuesdays/8:30 to 12:30
			Total Hours/Month
			16

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Supervising Attorney	0.1	0.1
	Staff Attorney	0.3	0.3
		0	0
	Lawyers Total	0.4	0.4
Paralegals	Paralegal	0.25	0.15
		0	0
	Paralegals Total	0.25	0.15
Other		0	0
		0	0
	Other Total	0	0

Goals and Objectives			
	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing	100	0	0

Preparation			
Document Preparation and Review	100	0	0
Filing or Services Assistance	100	0	0
Supervised Settlement Services	0	0	0
Post-hearing Assistance	0	0	0
Other	0	0	0
Explain Other	Preparation for referral to pro bono attorneys.		

Community Engagement – Outreach	PLC will publicize its services through existing outreach channels at the Courts, service centers, partner organizations, and at PLC's Santa Ana offices.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	Parties are highly unlikely to be ineligible due to the Court's role in determining de facto status and referring litigants to our project. Due to restrictions of the Partnership Grant program, the project will only assist litigants up to the point of pro bono placement by PLC's Family Law Unit. PLC will provide disclosures and additional information in an accessible manner.
Alternative Services	Parties are highly unlikely to be ineligible due to the Court's role in determining de facto status and referring litigants to our project. Due to restrictions of the Partnership Grant program, the project will only assist litigants up to the point of pro bono placement by PLC's Family Law Unit.
Court's Role	The Court has agreed to provide basic space, supplies, and access necessary for PLC to implement this project. The Court has also agreed to continue to meet with PLC on a quarterly basis to identify ways the project can be improved. To inform self-represented litigants of the limitations on the scope of services provided, signs will be posted outside the courtroom set aside for the Project. The Orange County Superior Court website will also provide notice of the Project, including time, location and eligibility requirements.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Riverside Legal Aid			
Project Name	Small Estates/probate 2023			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$110,000.00	\$110,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>As in previous funding years Riverside Legal Aid plans to continue its work with Small Estates Probate cases. That work consists primarily of helping indigent clients with obtaining the assets to which they are entitled by the Small Estates limits. All clients will be screened for eligibility under the IOLTA standard, which has just been increased. This increase could result in additional clientele. Paralegals will be preparing paperwork in probate and consultations with one of 2 attorneys working in this area for Riverside Legal Aid will be continued. Additionally, the probate court will be monitored by the RLA attorneys and they will be available for consultation at that time. Live in person clinics should resume soon in the courthouses. Court staff and RLA are working on this resumption. Staff is available and attorneys, both volunteer and paid are also available. We have paralegal availability as well. The newer component will be added as a result of AB1194, known as the Free Britney bill. Since probate conservatorships will be subject to more rigorous standards additional support is requested in this partnership grant. Probate accounting classes are also offered to the public under this grant.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Riverside Superior Court	Riverside	4129 Main St. Riverside, CA	1st thursday	4
Riverside Superior Court	Indio	45561 Oasis St, Indio, CA	1st thursday	4

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers		0	0
		0	0
		0	0
	Lawyers Total	0	0
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other		0	0
		0	0
	Other Total	0	0

Goals and Objectives	
-----------------------------	--

	Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options	0	0	0
Information on Court Procedures and Hearing Preparation	250	12	100
Document Preparation and Review	100	12	100
Filing or Services Assistance	0	0	0
Supervised Settlement Services	0	0	0
Post-hearing Assistance	30	0	0
Other	0	0	0
Explain Other			

Community Engagement – Outreach	The service is promoted on RLA and Court websites and on flyers distributed in the self help center, in probate courtrooms, RLA office, law libraries, Public Administrators Office, Court Probate Clerk's office and offices of other legal services providers. Since Covid individual clients are being sent to us by Courts and Judges. All the relevant courts have all our phone numbers to call for service and sometimes they are given separately from the flyers in courtrooms as well.
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	All potential clients are reviewed for eligibility by intake workers, generally paralegals who are familiar with the IOLTA standard. Only the IOLTA standard 200% of poverty level is used for these and all other State Bar funded services. Our case management system Legal Server has this standard and all eligibility questions pre-programmed into the intake questions and automatically calculates the percentage of poverty level for each applicant
Alternative Services	Referrals are made through the Lawyer Referral Service of the Riverside County Bar Association for those in need of attorney services who are above income level.
Court's Role	At this point in time, those clinics which are in existence are all in RLA Offices. Planned reopenings in court were thwarted as the Courthouses continued to experience only partial reopenings due to the pandemic. Courthouses in Riverside County were intermittently opened and then closed and no actual in court clinics are open at this time. In the past when they have been open the Court provided Rooms in or near the courthouses for these purposes. Computers with links to the court data system were included in these rooms.

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	San Diego Volunteer Lawyer Program			
Project Name	Central Division Restraining Order Clinic			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$210,010.00	\$130,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No				
Project Abstract	<p>The Central Division Restraining Order Clinic (CDROC) is a collaboration between San Diego Volunteer Lawyer Program, Inc. (SDVLP) and the San Diego Superior Court (Court) to assist domestic violence survivors and survivors of elder or dependent adult abuse in obtaining legal protection and referrals for legal and social services providers. SDVLP staff and volunteer attorneys at the CDROC provide one-on-one assistance to survivors of abuse by preparing Domestic Violence, Elder Abuse or Dependent Adult Abuse Restraining Order (DVRO) applications, which survivors file in pro per. The days and hours of operation of the CDROC are Monday through Friday, 8:30 a.m. to 5:00 p.m., excluding court holidays. The CDROC is located on the 4th floor of the Central Courthouse at 1100 Union Street, San Diego, CA 92101.</p> <p>In addition to one-on-one legal assistance, the CDROC will hold virtual legal workshops and cover topics such as how to interact with the Court, and what constitutes proper service of process. The CDROC will also develop and hold virtual legal workshops for SRLs on hearing preparation and presentation of evidence. While hearings are remote, these workshops will also provide information on best practices for attending hearings virtually.</p> <p>Lastly, the CDROC will continue to create a series of short, informational videos on topics related to domestic violence, such as safety planning, the intersection between immigration and domestic violence, the impact of restraining orders on child custody, proper service of process, and how to file evidence. The CDROC will create two to five informational videos to be distributed to clients.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
San Diego County Superior Court	Central	1100 Union Street, San Diego, CA 92101	Monday through Friday 8:30 a.m. to 5:00 p.m.	Average of 172 hours/month

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Chief Executive Officer	0.03	0
	Supervising Attorney	0.13	0
	Staff Attorney	1	0.8
	Lawyers Total	1.16	0.8
Paralegals		0	0
		0	0
	Paralegals Total	0	0

Other	Legal Admin Assistant	1	0.8
	Legal Admin Assistant	0.05	0
	Other Total	1.05	0.8

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options		0	0	0
Information on Court Procedures and Hearing Preparation		1400	0	0
Document Preparation and Review		1400	36	120
Filing or Services Assistance		1400	0	0
Supervised Settlement Services		1400	0	0
Post-hearing Assistance		0	0	0
Other		0	0	0
Explain Other	The CDROC will continue to create a series of short, informational videos on topics related to domestic violence, such as safety planning, the intersection between immigration and domestic violence, the impact of restraining orders on child custody, proper service of process, and how to file evidence. The CDROC will create two to five informational videos to be distributed to clients and self-represented litigants. The videos will be recorded in English and in Spanish.			

Community Engagement – Outreach	SDVLP's CDROC has been in operation in downtown San Diego since 1989. Litigants who come to the courthouse seeking assistance with a DVRO are directed to the CDROC clinic. Law enforcement routinely refer survivors to the CDROC, as do other DV service providers and social service agencies. Detailed information regarding these services is posted on our website, along with information regarding other social service providers (such as 211), and on the CDROC flyer. The clinic information is also listed on the self-help services section of the San Diego Superior Court's website.
Attorney-Client Relationship	Yes
Conflict of Interest Protocols	<p>The CDROC establishes an attorney-client relationship with its clients. A conflict check on each potential litigant is performed prior to providing legal advice. The CDROC has direct, online access to SDVLP's database for conflict check purposes.</p> <p>SDVLP has an agreement with the Court and the Court's Family Law Facilitator (FLF) wherein those with conflicts are referred to the FLF and such litigants receive priority access to the FLF. The FLF's office is located on the same floor as the CDROC, and does not inconvenience the litigant requesting assistance. SDVLP provides a referral slip to the requesting party, so that the FLF is aware of the source and reason for the referral.</p>

Income Eligibility Guidelines	<p>Applicants are required to complete a brief initial intake form which collects the basic information necessary for clinic staff to determine if there is a conflict. After a determination that there is no conflict, applicants complete an application for legal services which documents the amount and source of their gross monthly income and other basic demographic information. SDVLP has adopted the State Bar of California's Income Guidelines for Pro Bono Programs and applies this criteria program-wide in determining an applicant's eligibility for services. In certain exigent situations in which the applicant requires immediate assistance, SDVLP will waive the financial eligibility test. In instances where there is not an emergency, applicants who do not fall within these financial eligibility guidelines will be given relevant legal educational materials, referrals to the FLF or referrals to the local bar association lawyer referral service.</p> <p>Applicants are screened to ensure that the subject matter falls within the statutory guidelines for DVROs (or other type of restraining order). Intake personnel are trained on screening. Eligible clients who qualify for a DVRO, but are in the wrong venue, will still be assisted in the preparation of the necessary documents, as statutorily, a DVRO may be filed at any courthouse, regardless of venue.</p> <p>Finally, SDVLP does not assist individuals who already have an attorney of record. These individuals will be referred to their attorneys for assistance.</p>
Alternative Services	<p>When the CDROC recognizes that the litigant is not eligible for CDROC services, the CDROC makes referrals to the proper legal services provider. The list is long and is dependent upon the applicant's legal needs. Common legal provider referrals include the FLF, Family Justice Center, San Diego County Law Library, Public Defender's Office, District Attorney's Office, Legal Aid Society of San Diego, ABA Immigration Justice Project, Access, Inc., Casa Cornelia Law Center, Catholic Charities of San Diego, Employee Rights Center, Immigration Center for Women and Children, International Rescue Committee, Jewish Family Service of San Diego, the University of San Diego School of Law's Legal Clinics or to the San Diego County Bar Association's Lawyer Referral and Information Service.</p> <p>When the CDROC refers litigants who are not eligible for CDROC services to human and social services agencies, the referrals again vary depending upon the litigant's needs. The CDROC frequently makes referrals to other agencies that assist survivors of domestic violence such as the YWCA of San Diego County, South Bay Community Services, Jewish Family Service (Project Sarah), Southern Indian Health Council, License to Freedom, and the LGBTQ Community Center.</p> <p>The CDROC has created a safety planning resource which includes referrals to the San Diego Family Justice Center, 2-1-1 San Diego, 911, San Diego County's 24 Hour DV Hotline, Center for Community Solutions, Women's Resource Center, Community Resource Center, and Crisis House. This resource is provided to all litigants applying for CDROC services.</p>
Court's Role	<p>The Court utilizes the CDROC as the primary legal resource for DVRO litigants. As a result, the Court provides office space for SDVLP staff and volunteers on the 4th floor of the Central Courthouse. CDROC staff are provided with badges to access the CDROC space. The Court also provides signage so that litigants know where to go to access services. Additionally, the CDROC provides security and utilities at the CDROC.</p>

**PARTNERSHIP GRANTS
PROJECT PROFILE**

Organization Name	Senior Citizens Legal Services			
Project Name	Indigent Landlord/Tenant Services and Mediation			
Grant Year	Total Budget	Amount Requested	Amount Awarded	
2023	\$116,100.00	\$105,000		
Currently Funded Partnership Grant	Court Letter(s) on File	Memorandum of Understanding(s) Reviewed	All Services at Courthouse	
No			Pending	
Project Abstract	<p>The goal of this innovative partnership project is to keep people safely housed by educating both sides in housing disputes and promoting mediation prior to unlawful detainer ("UD") hearings. Senior Citizens Legal Services ("SCLS") is currently partnering with the Superior Court of Santa Cruz County ("Court") and contracting with the Conflict Resolution Center ("CRC") in its first year of this partnership grant. A full-time attorney has been hired, and just recently began providing in-person, in pro per services to indigent tenants and landlords at the Santa Cruz County Law Library Monday-Friday 8-12, and at SCLS Monday-Thursday 1-4:30. CRC is set up for conducting up to 10 pre and post filing UD mediations each month, at a location designated by CRC or via zoom. Day of court mediation, at the UD calendar, is still being evaluated by the Courthouse. These brand new legal housing services will be promoted via e-mail to all non-profit, government and legal organizations in the two county jurisdiction and to the general public through media outlets and social media.</p> <p>The target population for these new services are indigent landlords and tenants from across Santa Cruz and San Benito counties. Both Santa Cruz Superior Court and SCLS already have existing partnerships with the County of San Benito, thus, except for day of court mediation, San Benito County residents will be eligible for most of these new services. All our customers will share two characteristics: they are concerned about housing and do not have private representation.</p>			
Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Superior Court of Santa Cruz	Law Library	701 Ocean Avenue, Room 070, Santa Cruz, CA	M-F 8-12	80
Senior Citizens Legal Services		501 Soquel Avenue, Suite F, Santa Cruz, CA	M-Th 1-4:30	56

Personnel Categories	Project Staff	Total Project FTEs	PG Share of FTEs
Lawyers	Project Attorney	1	1
	SCLS Supervisor	0.1	0.1
		0	0
	Lawyers Total	1.1	1.1
Paralegals		0	0
		0	0
	Paralegals Total	0	0
Other	CRC Mediator	0.38	0.38
	CRC Supervisor	0.1	0.1
	Other Total	0.48	0.48

Goals and Objectives				
		Number of Individual Services	Number of Workshops	Individuals to be Served at Workshops/Group Activities
Information on Legal Options				
Information on Court Procedures and Hearing Preparation				
Document Preparation and Review				
Filing or Services Assistance				
Supervised Settlement Services				
Post-hearing Assistance				
Other				
Explain Other	<p>The partnership project in its second year has the same four basic goals: Goal 1: Expand service capacity for Superior Court of Santa Cruz's unlawful detainer calendar and in pro per housing related services in the two county jurisdiction. Goal 2: Provide earlier access to mediation as an alternative to the standard unlawful detainer docket. Goal 3: Preserve Court resources by having properly prepared self represented litigants, particularly with properly prepared documents, correct venue, service, and adequate courtroom presentation. Goal 4: Increase project participant satisfaction with the partnership project services compared with other standard services provided that are not part of the project. The quantified deliverables are presented here as project objectives: Objective 1A: To provide 312-416 hours per year (roughly 35 hours per month) of professional mediation assistance for the unlawful detainer court docket. Objective 1B: To complete mediation as an alternative to standard housing court docket for up to 10 cases per month, which is 120 cases annually. Objective 1C: To provide 1,040 hours per year (roughly 87 hours per month) of attorney assistance for in pro per housing law services at the Court's Law Library. Objective 1D: To provide 728 hours per year (roughly 60 hours per month) of attorney assistance for in pro per housing law services for Senior Citizens Legal Services. These realistic goals and measurable objectives will be met through the combined commitment and leadership of the Court, Senior Citizens Legal Services, the Conflict Resolution Center and oversight through the state.</p>			

Community Engagement – Outreach	<p>These new legal housing services will be promoted via our mail chimp list serv email to all non-profit, government and legal organizations in the two county jurisdiction. Print and social media outreach and community outreach will be initiated prior to and during the partnership project. It is anticipated that the marketing of these important new services will lead to potential housing problems being caught significantly "upstream" leading to more people remaining safely housed.</p> <p>Providing landlords and tenants information in housing matters and helping both sides understand their legal rights can pave way for resolution of housing disputes. Properly marketing this important new service will encourage individuals at risk of losing their housing to address potential problems earlier. Additionally, economic security is paramount to housing security, as the majority of evictions are based on non-payment of rent. Economic security is often related to understanding one's legal rights and ensuring continuation of public benefits.</p> <p>We anticipate a large wave of housing cases to come when all eviction protections end on March 31, 2022, and indeed have already seen an increase in weekly service numbers. Being ready and able to meet and triage community needs will be something our project attorney and every project partner will face. Working collaboratively and properly staying connected through consistent outreach will allow us to be more effective in our response rather than working in isolation.</p>
Attorney-Client Relationship	No
Conflict of Interest Protocols	N/A
Income Eligibility Guidelines	<p>Services are targeted for only indigent individuals under this partnership project. The Court is responsible for review and documentation of indigent status at the Law Library, while SCLS is responsible for the same at SCLS. To determine initial eligibility, the project attorney will use an already established intake form that includes the Self Help Center's screening questions.</p> <p>Additional questions about income have been added specifically to this form. At the Courthouse, the Law Librarian will generally be available to screen the individual and direct the person to the project attorney. If the individual is over income, they will be assisted using other available resources. Similarly at SCLS the receptionist will complete the initial intakes using the SCLS screening form, which already includes income information and then determine whether to send the individual to the project attorney, or to other SCLS staff.</p> <p>From a practical stand point, historically, the Self Help Center has not seen income restriction be a problem. The Court's Self Help Center and SCLS had one previous partnership grant which began in 2008 and had similar income restrictions for conservatorship cases. Very few customers presented above income and virtually every customer was grateful for the legal assistance they received whether from the project staff or other Self Help Center staff. It is likewise expected that the Self Help Center and SCLS will have very few inquiries from housing law customers who are over resource limits and fortunately adequate alternative resources are available for those who are above income.</p>

Alternative Services	<p>Fortunately, both the Court's Self Help Center, the Law Library and SCLS do have means to serve over income individuals or over income seniors in the case of SCLS. So, if any consumer is over income they will simply be referred to the court-employed staff at the Self Help Center or the Law Library, or to other qualified staff at SCLS if over 60. At SCLS, a landlord or tenant who is younger than 60 and over income will be referred back to the Self Help Center or Law Library. Additional referrals may be made to the County's Lawyer Referral Service, or the Watsonville Law Center or CRLA, if required. The project attorney can also show the over-income consumer how to locate the court forms online while providing other referrals and explaining that services from the partnership project will not be available.</p>
Court's Role	<p>Customers will benefit from access to the wealth of resources already offered at the Santa Cruz Law Library. Six large tables, computers, copiers, internet services and other routine supplies will all be provided. These public computers are linked to the California Court's On-line Self Help center, have access to Nolo Press books and will include programs to prepare required judicial council forms. Security at the court-site is handled by court staff and by the Santa Cruz County Sheriff.</p> <p>The project attorney could be considered a 'quasi-court' employee and will be equipped with a Microsoft Surface Pro 7 laptop and zoom license. Project funds will be used to purchase the laptop and license. The laptop will be linked to the Courthouse Odyssey internal case database which proves invaluable in helping staff understand what services customers may need for already existing UD matters. The laptop will also be used in responding to email and phone calls from landlords and tenants from both Santa Cruz and San Benito counties and to spread the reach of our services through zoom based workshops. In-kind service through personnel, space use and other Partnership Project collaboration, from the Court, and from the Conflict Resolution Center, and community based partners, will assure the successful implementation of the project. Indeed, SCLS will also be donating to the Partnership a dedicated office space, with computer, printer and all necessary tools for the pro per services offered at SCLS.</p>

2023 Partnership Grant Rubric Scores and Tentative Funding Recommendations*Completed at the July 21, 2022 Partnership Grants Committee Meeting*

Total Amount Requested	\$2,896,034
Total Amount Available	3,501,479
2022 Total Amount Awarded (for reference)	\$2,580,574
PG 2.0 Amount Awarded (for reference)	\$3,880,237
2022 and PG 2.0 Total Amount Awarded (for reference)	\$6,460,811

Organization	Project Title	Rubric Scores				Total Amount Requested	PG Committee Tentative Funding Recommendations (as of May 12, 2022)		PG Committee Funding Recommendations
		Selection Criteria Total	Funding Priority	Innovation	TOTAL		Scenario #1: \$6.46M	Scenario #2a (\$2.58)	
LACBA Counsel for Justice	Domestic Violence Legal Services Project (DVP)	76	12	1	89	\$ 104,000	\$ 104,000	\$ 104,000	\$ 104,000
Legal Aid Society of San Bernardino	CSEAJ - PROBATE PARTNERSHIP 2023	71	16	1	88	\$ 159,034	\$ 159,034	\$ 150,000	\$ 159,034
Neighborhood Legal Services	POMONA - READY FOR TRIAL!	64	20	4	88	\$ 120,000	\$ 120,000	\$ 120,000	\$ 120,000
California Rural Legal Assistance, Inc.	San Joaquin County Housing Helpline Court Clinic Partnership	62	20	4	86	\$ 132,000	\$ 132,000	\$ 132,000	\$ 132,000
Neighborhood Legal Services	San Gabriel Valley - Remote Services - Housing	68	16	1	85	\$ 124,000	\$ 124,000	\$ 124,000	\$ 124,000
Legal Access Alameda	Family Law Status Conference Clinic	72	13	0	85	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000
Legal Aid Society of San Diego	South Bay Restraining Order Project	68	16	0	84	\$ 120,000	\$ 120,000	\$ 120,000	\$ 120,000
Bet Tzedek Legal Services	Remote Pro Se Technology Initiative	61	20	2	83	\$ 120,000	\$ 120,000	\$ 120,000	\$ 120,000
Justice & Diversity Center of the Bar Association of San Francisco	FLASH	66	14	3	83	\$ 70,000	\$ 70,000	\$ 70,000	\$ 70,000
Legal Services of Northern California	Yolo Consumer Clinic	63	18	2	83	\$ 39,000	\$ 39,000	\$ 39,000	\$ 39,000
Community Legal Aid SoCal	Norwalk Consumer Debt Series	63	20	0	83	\$ 34,000	\$ 34,000	\$ 34,000	\$ 34,000
Legal Aid Foundation of Los Angeles	2023 - Torrance Self Help Partnership Grant	66	16	0	82	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
Community Legal Aid SoCal	Compton Self-Help Economic Expansion Project Year 2	62	18	1	81	\$ 91,000	\$ 91,000	\$ 91,000	\$ 91,000
San Diego Volunteer Lawyer Program	Central Division Restraining Order Clinic	63	16	1	80	\$ 130,000	\$ 130,000	\$ 130,000	\$ 130,000
Senior Citizens Legal Services	Indigent Landlord/Tenant Services and Mediation	60	20	0	80	\$ 105,000	\$ 105,000	\$ 105,000	\$ 105,000
Legal Aid of Marin	Homelessness Prevention Through Mandatory Settlement Conferences	63	16	1	80	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000
Legal Aid Foundation of Santa Barbara County	LRC Partnership	63	16	0	79	\$ 138,000	\$ 138,000	\$ 127,890	\$ 138,000
Public Law Center	DeFacto & Adoptive Parent Assistance Project	62	16	1	79	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000
Elder Law & Advocacy	Imperial County Elder Abuse Technology Project	54	20	3	77	\$ 105,000	\$ 105,000	\$ 105,000	\$ 105,000
Bet Tzedek Legal Services	Decedent Estate Self-Help Clinic	55	20	0	75	\$ 150,000	\$ 150,000	\$ 127,500	\$ 150,000
Neighborhood Legal Services	STABILIZING FAMILIES PROJECT	59	16	0	75	\$ 105,000	\$ 105,000	\$ 89,250	\$ 105,000
Community Legal Aid SoCal	Orange County Consumer Debt Series	62	12	1	75	\$ 69,000	\$ 69,000	\$ 58,650	\$ 69,000
Legal Aid Society of San Diego	Name Change & Gender Change Self-Help Clinic	62	12	0	74	\$ 85,000	\$ 85,000	\$ 72,250	\$ 85,000
Legal Assistance for Seniors	Partnership to Assist Limited Conservatorship Litigants	59	15	0	74	\$ 50,000	\$ 50,000	\$ 42,500	\$ 50,000
Inland Counties Legal Services	Consumer Rights Clinic EXPANSION	54	17	2	73	\$ 151,000	\$ 151,000	\$ 128,350	\$ 151,000
Neighborhood Legal Services	PASADENA - CONTINUUM OF SERVICES	55	16	2	73	\$ 115,000	\$ 115,000	\$ 97,750	\$ 115,000
Legal Access Alameda	Family Law Day of Court	66	7	0	73	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000
Family Violence Law Center	Domestic Violence Pro Per (DVPP) Project	60	5	0	65	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000
Legal Assistance for Seniors	Partnership to Assist Guardianship Litigants	59	4	0	63	\$ 55,000	\$ 55,000	\$ 46,750	\$ 55,000
Central California Legal Services	Guardianship Project	46	8	0	54	\$ 70,000	\$ 70,000		\$ 70,000
Riverside Legal Aid	Small Estates/probate 2023	41	10	0	51	\$ 110,000	Add'l Info		

		Scenario #1	Scenario #2a	
Available Funds	N/A	\$ 6,460,811	\$ 2,580,574	\$ 3,501,479
Allocated	N/A	\$ 2,786,034	\$ 2,579,890	\$ 2,786,034
Remaining	N/A	\$ 3,674,777	\$ 684	\$ 715,445