



Legal Services Trust Fund Commission 2023 Work Plan*

Charge:

The Legal Services Trust Fund Commission (LSTFC) is composed of 24 members (21 voting and three nonvoting judicial members) appointed by the Board of Trustees, Senate Committee, Speaker of the Assembly, Judicial Council of California, and LSTFC. The charge of the LSTFC is as follows:

- Administer, in accordance with legal requirements and State Bar Rules, revenue from Interest on Lawyers' Trust Accounts (IOLTA) and other funds remitted to the Legal Services Trust Fund Program of the State Bar including the Equal Access Fund (EAF) from the Judicial Council pursuant to the California state budget.
- The LSTFC determines an applicant's eligibility for grants and notifies each grant applicant that its application has been approved or denied.
- The LSTFC monitors and evaluates a recipient's compliance with Trust Fund Requirements and grant terms.
- The LSTFC also reviews denial or termination of funding and complaints from any person or entity when a grant recipient fails to meet Trust Fund Requirements. (Rules of the State Bar, Title 3, Division 5, Chapter 2, Rule 3.661)
- The LSTFC determines the annual IOLTA distribution and the distribution plan for any grant funding, including discretionary grants.

* Please note: Due to the current COVID-19 health crisis, implementation of this Work Plan may require flexibility to address pressing needs as they arise. However, all core business and compliance objectives will be timely met.

STRATEGIC PLAN GOAL & OBJECTIVE	WORK PLAN	DEADLINE	TO BOARD COMMITTEE (Y/N) / DATE
None —Core Business	<ul style="list-style-type: none"> Review and approve 20243 IOLTA and EAF Grant awards Review and approve IOLTA and EAF Grant carryover and budget modification requests 	<ul style="list-style-type: none"> 12/01/232 Ongoing 	No
None —Core Business	<ul style="list-style-type: none"> Review and approve 2022 and 20243 Partnership Grant awards Review and approve Partnership Grant carryover and budget modification requests 	<ul style="list-style-type: none"> 09/01/232 Ongoing 	No
None —Core Business	<ul style="list-style-type: none"> <u>Review and approve Homelessness Prevention 4 Grant awards</u> Review and approve Homelessness Prevention Grant carryover and budget modification requests 	<ul style="list-style-type: none"> <u>01/01/2023</u> Ongoing 	No
None —Core Business	<ul style="list-style-type: none"> Determine whether to issue Bank Grant RFP for 20243 funding; <u>if yes, draft RFP and scoring rubric and review grant applications.</u> Review and approve Bank Grant carryover and budget modification requests 	<ul style="list-style-type: none"> 09/01/232 Ongoing 	No
<u>Core Business</u>	<ul style="list-style-type: none"> <u>Participate in CARE Court implementation process</u> <u>Develop RFP and scoring rubric for CARE Court grants, and review and approve grant awards.</u> 	<ul style="list-style-type: none"> <u>Ongoing until 2025</u> 	<u>No</u>
<u>Core Business</u>	<ul style="list-style-type: none"> <u>Review and approve 2023 consumer debt legal assistance grants</u> 	<ul style="list-style-type: none"> <u>01/01/2023</u> 	<u>No</u>
<u>Core Business</u>	<ul style="list-style-type: none"> <u>Review and approve 2023 law student summer fellowships</u> 	<ul style="list-style-type: none"> <u>06/01/2023</u> 	<u>No</u>
None —Core Business	<ul style="list-style-type: none"> Monitor compliance of provisional licensed lawyer awards 	<ul style="list-style-type: none"> Ongoing 	No

<u>Compliance</u>	<ul style="list-style-type: none"> • <u>Monitor compliance of CalFHA foreclosure prevention grants</u> 	<ul style="list-style-type: none"> • <u>Ongoing until 2024</u> 	
None —Compliance	<ul style="list-style-type: none"> • Review cases in which a grantee’s funding may be terminated because of their failure to comply with relevant legal standards and authorities 	<ul style="list-style-type: none"> • Ongoing 	No
None —Core Business	<ul style="list-style-type: none"> • Determine 20243 IOLTA distribution 	<ul style="list-style-type: none"> • 07/01/232 	Yes, 07/21/2 32
Core Business Goal 1, objective c: No later than September 30, 2018, determine the appropriate role of, and Board responsibility for, State Bar Standing Committees, Special Committees, Board, and Commissions in the new State Bar. Goal 4, objective b: Study and implement improved programmatic approaches to increasing access to justice.	<ul style="list-style-type: none"> • Gather, codify, and revise, as necessary and appropriate, all of the decision points and considerations that are used as part of the grant administration and determination processes and procedures 	<ul style="list-style-type: none"> • Ongoing with goal to complete codification process in 20243 (by the IOLTA/EAF application release date for 20244 funding) 	Ongoing Yes, Summer 2022
<u>Compliance</u> Goal 4, objective a: Support increased funding and enhanced outcome measures for Legal Services.	<ul style="list-style-type: none"> • Aggregate and analyze Homelessness Prevention Grant evaluation data • Draft key findings and outcomes on Homelessness Prevention funds • Aggregate and analyze EAF Grant evaluation data • Aggregate and analyze Bank Grant evaluation data • <u>Draft key findings and outcomes on Bank Grant funds</u> • <u>Aggregate and analyze CalFHA foreclosure prevention evaluation data</u> • <u>Aggregate and analyze consumer debt legal assistance evaluation data</u> • Participate in efforts to increase funding for legal aid grants 	<ul style="list-style-type: none"> • Ongoing • Ongoing • Ongoing • Ongoing • Ongoing • Ongoing 	No
Goal 4, objective c: No later than December 31, 2019, complete a California Justice Gap	<ul style="list-style-type: none"> • Based on recommendations from the Justice Gap Study, research and explore recruitment and 	<ul style="list-style-type: none"> • Ongoing 	No

Study. The Justice Gap Study will be modeled on the 2017 Legal Services Corporation Justice Gap Study but will also include an evaluation of the costs of legal education in California and the impact of those costs on access to justice, as well as possible approaches to addressing the costs of legal education including loan forgiveness programs or other means.	retention strategies for legal aid attorneys, including the creation of a statewide Loan Repayment Assistance Program (LRAP)		
---	--	--	--