



2023 LAW SCHOOL FELLOWSHIP GRANTS REQUEST FOR PROPOSALS

This document provides information for organizations interested in submitting proposals for the 2023 Law School Fellowship Grants. Organizations should review this document for information about eligibility, selection criteria, and the scoring rubric for this competitive grant. Organizations should ensure that their proposals clearly address the principal concerns of the funding authorities.

The 2023 Law School Fellowship Grants are competitive and discretionary. Proposals must be submitted on SmartSimple by **5:00 p.m. PST on Friday, March 10, 2023**.

If you have any questions, please contact Elizabeth Hom at Elizabeth.Hom@calbar.ca.gov.

BACKGROUND

On September 18, 2022, Governor Gavin Newsom signed Assembly Bill 2958 (AB 2958).¹ AB 2958 amends section 6140.03 of the Business and Professions Code to increase by five dollars the voluntary opt-out contribution collected as part of the attorneys' annual license fee to support Interest on Lawyers' Trust Accounts (IOLTA) funded organizations. According to the amended statute, the additional five dollars "shall be allocated to qualified legal services projects [QLSPs] or qualified support centers... to fund law student summer fellowships for the purpose of supporting law students interested in pursuing a career in legal services for indigent persons."²

Business and Professions Code section 6140.03 specifies that grants for law student summer fellowships shall be allocated pursuant to a competitive grant process administered by the Legal Services Trust Fund Commission (LSTFC). The State Bar must use the IOLTA funding formula to reallocate to QLSPs and support centers any funds that remain as of January 1, 2025.³ The following is the text of the amended statute:

¹ See AB 2958, https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220AB2958

² Business and Professions Code section 6140.03(b)(1).

³ Business and Professions Code section 6140.03(b)(4). The IOLTA funding formula is in Business and Professions Code section 6216.

Business and Professions Code section 6140.03:

(a) The board shall increase each of the annual license fees fixed by Sections 6140 and 6141 by an additional forty-five dollars (\$45), to be allocated only for the purposes established pursuant to Section 6033 and subdivision (b), except to the extent that a licensee elects not to support those activities.

(b) (1) Five dollars (\$5) of the forty-five-dollar (\$45) fee shall be allocated to qualified legal services projects or qualified support centers, as defined in Section 6213, to fund law student summer fellowships for the purpose of supporting law students interested in pursuing a career in legal services for indigent persons. The State Bar shall not make any deductions from the five dollars (\$5) for any reason, including, but not limited to, administrative fees, costs, or expenses of the State Bar.

(2) Except as provided in paragraphs (4) and (5), funds shall be allocated pursuant to a competitive grant process administered by the Legal Services Trust Fund Commission and not through the formula set forth in Section 6216.

(3) In awarding these grants, preference shall be given to fund proposals for fellowships serving rural or underserved communities and that serve clients regardless of immigration or citizenship status.

(4) Any funds under paragraph (1) not allocated as of January 1, 2025, shall be distributed to qualified legal services projects and support centers pursuant to the formula set forth in Section 6216.

(5) The allocation described in this subdivision shall remain in effect until December 31, 2024, and after that date, the entire forty-five dollars (\$45) shall be allocated only for the purposes established pursuant to Section 6033.

(c) The invoice provided to licensees for payment of the annual license fee shall provide each licensee the option of deducting forty-five dollars (\$45) from the annual license fee if the licensee elects not to have this amount allocated for the purposes established pursuant to Section 6033.

(d) This section shall become operative on January 1, 2023.

AWARD INFORMATION

Business and Professions Code section 6140.03 authorizes funding for law student summer fellowships from January 1, 2023, through December 31, 2024. The State Bar anticipates two Law School Fellowship grant funding opportunities—one for 2023 and one for 2024. The first funding opportunity will have a grant period of May 15, 2023, to September 30, 2023.

The number of awards depends on the amount the State Bar collects from the \$5 increase in contributions during the 2023 and 2024 attorney licensing fee cycles, which depends on how many State Bar licensees opt out of that contribution. During a similar \$5 increase for the

Provisionally Licensed Lawyers (PLL) Grant, the State Bar received approximately \$768,000 for 2021 and \$792,000 for 2022. The State Bar projects similar figures for the 2023 fee cycle. There will be one grant disbursement during the grant period and State Bar staff will monitor grant expenditures in the final financial report.

For the 2023 Law School Fellowship Grants, applicants may apply to fund multiple fellows. Each fellow may be funded for up to \$10,000, with \$7,500 to be used solely for the compensation of one summer law student fellow and up to \$2,500 to cover payroll taxes, benefits and other direct or indirect costs associated with the fellow.

Successful grantees are required to select fellow(s) by June 1, 2023. If a grantee has yet to recruit the fellow(s) by that date, it will be required to return its award so that the State Bar can reallocate the funding to another applicant. Grantees are required to return any unused portion of their award at the end of the grant term, and no later than October 31, 2023. Extensions will be unavailable. Funds returned to the State Bar after the 2023 grant term will be carried over to the 2024 Law School Fellowship Grants.

SUPPORT AND RESOURCES FOR PARTICIPATING FELLOWS

The State Bar is partnering with [California ChangeLawyers](#) (ChangeLawyers) to provide additional support and resources to fellows funded by this grant. Fellows will join ChangeLawyers' cohort of fellows and be able to participate in workshops, training, and networking opportunities to support their professional and career development.

ELIGIBILITY REQUIREMENTS

Business and Professions Code section 6140.03 allows QLSPs and support centers, as defined in Business and Professions Code section 6213, to apply for and receive a competitive Law School Fellowship grant. Grant funding must be used to fund law student summer fellows providing services to indigent Californians, as defined by California Business and Professions Code section 6213(d).

SELECTION CRITERIA

Unlike other discretionary awards that the State Bar administers, Business and Professions Code section 6140.03 does not limit Law School Fellowship grants to averting or redressing specific legal harms. The Law School Fellowship Grants Committee has therefore set selection criteria that will direct awards toward those applicants best equipped to support their fellow(s) on a compelling project, thereby maximizing the fellow(s)' access to civil justice contribution while protecting consumers. This includes looking at the organization's ability and plan to recruit, train, mentor, guide, and supervise its fellow(s) on projects that fall within its existing experience and expertise.

Applicants that serve rural or underserved communities and that serve clients regardless of immigration or citizenship status shall receive preference, as required by Business and Professions Code section 6140.03.

2023 LAW SCHOOL FELLOWSHIP GRANTS SCORING RUBRIC

In an effort to provide transparency and equity in the review process, the Law School Fellowship Grants Committee will use a scoring rubric as a tool to help guide review of all eligible proposals. The rubric is comprised of two sections—Selection Criteria and Funding Preferences. The Law School Fellowship Grants Committee maintains discretion when determining funding recommendations even where that means funding an application(s) that scored lower on the rubric and not funding an application(s) that scored higher. The committee will use their best efforts to distribute grants statewide and prioritize funding for applications where a summer fellow(s) is already identified. Award decisions are final and without appeal.

SELECTION CRITERIA (88 PTS)				
Checkmark the appropriate ranking for each category, and then multiply by the number below.				
CATEGORY & DESCRIPTION	Exceeds Expectations	Meets Expectations	Below Expectations	Not Addressed
<u>Impact:</u> Applicant leverages the fellow(s) on a project(s) that is well within the organization’s experience and expertise.				
<u>Supervision:</u> Applicant describes its robust supervision practices and other quality assurance measures to protect the experiences of both its clients and the fellow(s).				
<u>Support:</u> Applicant describes a thoughtful plan to provide onboarding, training, networking, and mentorship to the fellow(s).				
<u>Recruitment:</u> Applicant lists the process to select a motivated and qualified candidate(s)—even if it has already selected a qualified candidate(s)—from a strong and diverse pool of candidates.				
Number of check marks	X22=	X16=	X10=	X0=
Subtotal A				

FUNDING PREFERENCES (12 PTS)

Checkmark the appropriate ranking for each category, and then multiply by the number below.

CATEGORY & DESCRIPTION	Exceeds Expectations	Meets Expectations	Below Expectations	Not Addressed
Serves rural populations: Applicant articulates the fellow(s)' focus on serving rural communities.				
Serves underserved populations: Applicant articulates the fellow(s)' focus on serving underserved communities.				
Serves clients regardless of immigration or citizenship status: Applicant articulates the fellow(s)' focus on serving clients regardless of immigration or citizenship status.				
Number of check marks	X4=	X3=	X2=	X0=
Subtotal B				
Total (Subtotal A + Subtotal B)				

DEFINITIONS

Exceeds Expectations	A proposal that scores "exceeds expectations" in a category/criterion satisfies the standard for "meets expectations" while standing out as particularly compelling or impressive. An application might be especially compelling, for instance, because it provides a unique opportunity for the law student to engage in special trainings or mentorship and/or to participate in an unusually impactful case or project. Or the proposal might be exceptionally detailed, thorough, evidence-driven, or otherwise well-conceived and convincing.
Meets Expectations	A proposal that scores "meets expectations" in a category/criterion is competitive and persuasive with respect to that row of the rubric. To be competitive, the proposal will be sufficiently ambitious and/or compelling to merit the use of competitive funds. To be persuasive, the proposal will describe circumstances sufficiently probative of the applicant's intention and ability to accomplish its stated objectives in that criterion.
Below Expectations	A proposal that scores "below expectations" in a category/criterion addresses that criterion but is insufficiently competitive or persuasive to justify a score of "meets expectations." The proposal might aspire to do too little, for instance, such as only occasionally serving rural clients for the "serves rural populations" criterion. Or the proposal might lack sufficient detail, explanation, or basis in fact to demonstrate its contours or likelihood of success. Since such a proposal might still articulate a feasible fellowship, this score confers some points.
Not Addressed	A proposal that scores "not addressed" in a category/criterion fails to satisfy that criterion in a meaningful way or lacks the relevant nexus. A proposal might fail to satisfy a criterion in a meaningful way if it articulates only a vague intention to do so. A response might lack the relevant nexus to "serves rural populations," for instance, if it would serve only in an urban community.

Selection Criteria (88 points)

Based on responses provided in the proposal, the committee will score each sub-section as “Exceeds Expectations,” “Meets Expectations,” “Below Expectations,” or “Not Addressed” with corresponding multipliers for a maximum of 88 points. The sub-sections for the Selection Criteria are:

- **Impact:** Applicants should describe in detail the legal work that the fellow(s) will perform over the grant period (from May 15, 2023, to September 30, 2023). In the response, they should describe the type of work (e.g. intakes, clinics, case work) with which the fellow(s) will engage and the fellow(s)’ role and the areas of law with which the fellow(s) will be assisting. In addition, applicants should describe their organization’s experience and expertise in the fellow(s)’ proposed projects—the interventions themselves (e.g. clinics vs. litigation), the areas of law, and the communities they serve.
- **Supervision:** Applicants should describe in detail how they will safeguard the quality of their fellow(s)’ services to clients as well as the fellow(s)’ own experience at the organization. In the response, they should state the supervisor(s) and their experience with the project and supervising others. In addition, applicants should explain the steps that the supervisor(s) will take to ensure that the fellow(s) provides safe, effective, and sensitive legal services to clients.
- **Support:** Applicants should describe in detail how they will support and develop the fellow(s) over the course of the fellowship and in encouraging a career in legal services for indigent persons. They should explain how the fellow(s) will onboard, receive trainings, meet with their supervisor(s), network, and collaborate with other staff. Applicants should describe with specificity the substantive law, legal skills, other (e.g. diversity, equity, and inclusion, trauma-informed care, and cultural humility) trainings, and other supports (e.g. access to legal templates and commercial research databases) that will be provided to the fellow(s) to assist them in their work.
- **Recruitment:** Applicants should describe how they recruited or will recruit, select, and confirm their fellow(s) by June 1, 2023. They should explain how they plan to seek a strong and diverse pool of candidates, including outreach efforts, and gauge the candidates’ interest in pursuing a career in legal services for indigent persons. Applicants should note whether/how their evaluation criteria in selecting the fellow(s) relate to the proposed work of the fellow. If the fellow(s) has already been selected, applicants should note if anything makes them particularly qualified to perform the work proposed.

Funding Preferences (12 points)

Based on responses provided in the proposal, the committee will score each sub-section as “Exceeds Expectations,” “Meets Expectations,” “Below Expectations,” or “Not Addressed” with corresponding multipliers for a maximum of 12 points. The sub-sections for the Funding Preferences are:

- **Serves rural populations:** Applicants should describe the extent to which the fellow(s) would serve rural communities.

The State Bar relies on the California Access to Justice Commission’s (Access Commission) definition of rural. The Access Commission recommends defining “rural” as areas that meet the medical service study area (MSSA) standard for “rural” or “frontier.” The California Office of Statewide Health Planning and Development identifies MSSAs using sub-county clusters of census tracts. The Access Commission argues that MSSA categories of rural and frontier—as opposed to urban—are better suited than counties to classify rural areas. Rural MSSAs have 50,000 or fewer residents and population densities below 250 people per square mile. “Frontier” MSSAs have population densities of fewer than 11 people per square mile.

- **Serves underserved populations:** Applicants should describe the extent to which the fellow(s) would serve underserved communities.

These funds are limited to serving those who are statutorily indigent. Therefore, applicants should explain how the targeted underserved population faces even higher barriers to accessing civil justice than do indigent people generally. Since “serves rural populations” is a separate criterion, “serves underserved populations” refers to serving other populations that are underserved relative to the indigent generally. Such populations may be defined with respect to categories including but not limited to race, ethnicity, age, limited English proficiency, disability status, and veteran status.

- **Serves clients regardless of immigration or citizenship status:** Applicants should describe the extent to which the fellow(s) serve clients regardless of immigration or citizenship status. They should elaborate on their policies and practices, including outreach efforts, to serve clients regardless of immigration or citizenship status.

APPLICATION COMPONENTS

A complete 2023 Law School Fellowship grant application will include the components below. Please see the application instructions for detailed guidance.

1. Form A: Project Profile

The project profile would include high-level information about the project such as its award request, length of fellowship, and project areas.

2. Form B: Fellowship Description

The project description would include detailed information about the fellowship. This includes the impact, supervision, support, recruitment, and funding preference categories. Applicants should provide detailed narratives about the applicant's qualifications and resources for the project.

3. Form C: Fellowship Budget

The fellowship budget will collect information on the State Bar-funded fellow(s)' compensation, and the amounts for the benefits, payroll taxes, and other indirect costs. Applicants may include expenses between May 15, 2023, and September 30, 2023.

4. Form D: Budget Narrative

The budget narrative would include descriptions of payroll taxes, benefits, and other direct or indirect costs associated with the fellowship(s), if applicable.

5. Form E: Fellow(s) Application Materials

If already selected, applicants should upload the cover letter(s) and/or resume(s) of the fellow(s).

6. Form F: Project Assurances

Applicants are required to assure compliance with the following:

- A. Applicant agrees that it will use funds it receives from the 2023 Law School Fellowship Grant only for purposes stated in its application.
- B. Applicant will immediately notify the State Bar of California (State Bar) if the grant-funded fellow leaves the organization before it has finished spending down its award.
- C. Applicant will return its grant award if they have not selected and confirmed State Bar-funded fellow(s) by June 1, 2023, unless the State Bar, in its sole discretion, makes an exception.
- D. Applicant will return any unused 2023 Law School Fellowship grant funds within one month of the end of the award period (by October 31, 2023).

- E. Applicant will not discriminate based on race, color, national origin, religion, gender, disability, age, marital or domestic partnership status, medical condition, or sexual orientation.
- F. Applicant will comply with fiscal management and quality control procedures adopted by the State Bar.
- G. Applicant will permit reasonable site visits and will present additional information deemed reasonably necessary to determine compliance with the terms of the grant.
- H. Applicant will comply with all applicable federal, state, and local employment laws as well as all other applicable laws and regulations.
- I. Applicant will make available to the fellow(s) resources that are similar to those it provides to its other summer law students such as a space to work, computer hardware, computer software, furniture, supplies, telecommunications, online services, etc.
- J. Applicant will file program and financial reports, as may be required by the State Bar, and cooperate with other data collection requests by the State Bar for this grant.
- K. Applicant understands that any proposal submitted for a Law School Fellowship grant, and all documents submitted pursuant to issuance of this funding, are public documents, and may be disclosed to any person.
- L. Applicant understands that the State Bar is permitted, in its sole discretion, to adjust Applicant's award at any time to reflect the actual amount of funding available for Law School Fellowship grants. Consequently, grantees shall not be guaranteed any specific dollar amount in grant funds, or any grant funds at all, if funds received are insufficient or unavailable to the State Bar.

REPORTING REQUIREMENTS

Demonstrating effective use of these funds is critical to supporting future funds. Grantees must, therefore, file a final financial report and program evaluation, which includes a description of the types of cases or matters on which the fellow(s) worked.

FINANCIAL REPORTING

Organizations that receive a Law School Fellowship Grant are required to submit a final financial report documenting grant expenditures, including payments to fellows. To ensure compliance with the authorizing statute, the State Bar reserves the right to require proof, at any time, of the amount, timing, and nature of payments towards fellow salaries, payroll taxes, and

benefits. Proof might include paystubs, third-party payroll processor reports, benefits invoices, etc. that show the organization's payments for its fellow(s)' work during the grant period.

EVALUATION

At the end of the grant period, organizations must submit a report describing the contributions of its grant-funded fellow(s) to the organization's services. The report will likely seek information about the following topics, among others:

- The scope of work that the fellow(s) performed during the grant period, including the fellow(s)' greatest accomplishments;
- The effect that the fellow(s)' work had on the organization's services to QLSPs or low-income Californians, especially notable case outcomes; and
- The organization's experiences during the award period.

In addition, a survey will be sent to grant-funded fellows to share their experiences during the fellowship. The questions will likely seek information about the following topics, among others:

- Fellow's experiences and learnings at the organization and as a part of the California ChangeLawyers cohort;
- Fellow's future career plans; and
- Fellow's demographic information.