



2024 PARTNERSHIP GRANTS REQUEST FOR PROPOSALS

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 17, 2023**.

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, grant award allocations vary, and all proposals may not be funded. For the 2023 grant year, 30 eligible projects were funded in a range from \$25,000 to \$159,000 for a total of \$2.79 million.

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, grantees must submit a comprehensive report and evaluation on the use and impact of these funds, and continuing projects must describe their plans for obtaining funding from other sources to support these projects after the termination of Partnership Grant support.

2024 PARTNERSHIP GRANTS SCORING RUBRIC

In an effort to provide transparency and equity in the review process, the Partnership Grants 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.
- **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 (85 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 (15 points)

The Commission will exercise its discretion and score the project 1-3 based on funding priorities. That number will be multiplied by 5 for a maximum section score of 15 points.

In making decisions regarding funding priorities, the Commission will consider factors that include, but are not limited to:

- Whether the project is new. A goal of Partnership Grant funding is to provide support for effect projects, which may be renewed for an initial five-year period. The Commission maintains discretion to determine what is considered a new project, and may consider factors, that include, but are not limited to, whether the project was previously or currently funded or proposes a substantial change to an existing service delivery model.
- Whether the project supports unmet rural needs, even if operating beyond a fifth year.

Optional – Innovation (up to 5 points)

The Commission encourages innovative projects and may award up to 5 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.	<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 (85 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 and related budget 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.			
<u>Continuity Planning</u> A successful proposal will address whether its proposed services can continue with funds other than those provided by Partnership Grants and provide details of past efforts and future plans to secure such alternate funding.			
<u>Evaluation</u> 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	X15=	X10=	X5=
Subtotal (B)			
Selection Criteria Total (A+B)			

FUNDING PRIORITIES (15 PTS)

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

<p>In making decisions regarding funding priorities, the commission will consider factors that include, but are not limited to:</p> <ul style="list-style-type: none"> Whether the project is new. A goal of Partnership Grant funding is to provide support for effective projects, which may be renewed for an initial five-year period. The commission maintains discretion to determine what is considered a new project, and may consider factors, that include, but are not limited to, whether the project was previously or currently funded or proposes a substantial change to an existing service delivery model. Whether the project supports unmet rural needs, even if operating beyond a fifth year of funding. 	3 2 1
Funding Priority Total Score	X5 =

OPTIONAL - INNOVATION (up to 5 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 (1-5 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.



Eligibility Category: LSP

Late Submission: ☐ Yes

Grant Year: 2024

Due Date: March 17, 2023 5:00pm PST

Prepared by: [Ms. Kimberly Rasmussen](#)

Email: krasmussen@alliancecr.org

Contact Phone: 213-368-6010

Funding Opportunity: Partnership Grants

Project Title: Permanency Benefits Clinic Court Partnership

Program Name: Alliance for Children's Rights

Applicant Title: Director of Institutional Giving

Address: 3333 Wilshire Boulevard Suite 550

City: Los Angeles

I verify that I have read, and am familiar with, the eligibility requirements and funding criteria for Partnership Grants.

Form A - Project Profile

Respond to the questions as concisely and completely as possible. All responses must be self-contained and should only refer to materials uploaded with this proposal.

1. Application Contact: Lara Holtzman

Job Title: VP of Legal and Program Services

Email: lholtzman@alliancecr.org

Telephone: 213-368-6010



2. Total Amount \$163,000

Requested:

Request project amounts
divisible evenly by
\$1,000.

3. Partner Court(s)

Edmund D. Edelman Children's Courthouse in Monterey Park

**4. County(ies) Served by
this Project:**

County(ies) Served by this Project

Los Angeles

5. Substantive Area(s)

Disability Rights, Income Maintenance, Juvenile

6. Is the project currently funded by a Partnership Grant?

No



7. Project Abstract

Provide a brief summary of the core aspects of your proposed grant project, including the legal area to be addressed; the target constituency; the type(s) of services to be provided; the location and hours of operation for this project; project staffing; general nature of court participation; and main goals. Detailed information regarding these areas will be provided in Form B – Project Description. (250 word limit)

Public benefits for families impacted by foster care is a critical part of the stability and even viability of foster placements, especially those with relative and non-related extended family member (NREFM) caregivers. Yet, funding eligibility and rates are complex, opaque, and easily misunderstood.

To address this need, and in partnership with the Edmund D. Edelman Children's Courthouse in Monterey Park, the Alliance proposes to create a Permanency Benefits Clinic to provide access to critical information for self-represented caregivers seeking adoption or legal guardianship of the children in their care. The goals of the Clinic would be to: 1) Provide information to self-represented caregivers regarding their rights and opportunities to access public benefits; 2) Help caregivers self advocate to obtain public benefits to which the children are entitled based on their specific needs; and 3) Reduce delays for caregivers and children seeking to exit the foster care system, by identifying and resolving benefits agreements, which are prerequisites to completing adoptions and legal guardianships. The Clinic would be located at the Courthouse, where Alliance attorneys would provide consultation for self-represented caregivers. The Clinic will be open once a week and alternate between in-person and virtual clinic days. The days and times will be arranged with the court. Clinic staffers will provide caregivers with self-help materials in English and Spanish and refer cases to the Alliance Benefits Program for further advocacy. The Clinic's primary client population would be caregivers, however, Clinic staff could provide consultation as needed to counsel and the court.

Form B - Project Description

1. Court Involvement

A successful proposal will indicate 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.



A formal letter of support and memorandum of understanding must be uploaded to Form F. See Application Instructions for detailed information about these documents.

a. Court Coordination

Describe the current and planned coordination and collaboration on this project with existing court-based services. (250 word limit)

* a. Court Coordination

Describe the current and planned coordination and collaboration on this project with existing court-based services. (250 word limit)

The Alliance has a long-standing relationship with the Dependency Court in Los Angeles County. We have worked cooperatively with the Court, the Department of Children and Family Services (DCFS), Children's Law Center (CLC), and others to ensure referral of critical cases to our agency for services across our programs for many years. This project is an opportunity to expand our services to currently self-represented caregivers who struggle to obtain assistance regarding the complex issues surrounding the funding they are entitled to receive for the children in their care. The Court will provide space for the Alliance to meet in person with caregivers, and also support the virtual meetings as the caregivers are currently using both in-person and virtual methods to appear in court. The Court will also work with the Alliance to advertise the Clinic and refer caregivers.

Court Name	Branch (If Applicable)	Address	On-Site Days/Hours	Total Hours/Month
Edmund Edelman Children's Court		201 Centre Plaza Dr, Monterey Park, CA 91754	2 hr/week	8

c. Facilities and Court Resources

Identify all space and material resources being provided by the court, and any special access to facilities or data to be provided to the project or its staff. (250 word limit)

Edmund D. Edelman Children's Courthouse will be providing the Alliance space to hold our clinics. Clinics will also be held remotely. The Court will support both in-person and remote clinics by advertising the clinic and referring caregivers seeking adoption and legal guardianship directly to the clinics for assistance. The court already refers caregivers to the Alliance for a variety of resources for assistance. This would just be a new resource available for caregivers at the court and remotely.



d. Regular Meetings

Project staff should meet no less than quarterly with key court partners, with a formal agenda. Identify the schedule for these meetings, who is expected to participate, and any issues currently to be resolved. (250 word limit)

An initial meeting has been held with the Presiding and Supervising Judge of the Juvenile Court along with court administrative staff. The project has been presented to the Presiding Judge of Superior Court for Los Angeles County and approved as well. The Court is in support of the project and is very excited about the prospect of providing self-represented caregivers access to critical benefits information to help make informed permanency decisions in a timely manner.

e. Evaluation Support

The court is considered to be an equal partner in ensuring that the funded services are meaningfully evaluated. Identify the court's role in evaluating this project. (250 word limit)

The Alliance will work with the Court to conduct a survey regarding the success of the project. The survey will seek to obtain feedback from caregivers and also the court itself regarding the effectiveness of the project. The Alliance has conducted these types of surveys in the prior years for our benefits direct representation program. These surveys will be updated to assess this program's specific approach, reach, and effectiveness.



f. Describe if there are other aspects of court involvement that distinguish this project from other self-help clinics, or any court partnership information not provided above. (250 word limit)

In the Dependency Process, foster parents are not considered parties to the proceedings. Therefore, they are not entitled to counsel or representation -- unlike all the other participants in the process: the minor, DCFS, and the parents. This clinic seeks to remedy that by provide self-help assistance to these self-represented critical caregivers that are the backbone of the foster care system. These caregivers struggle to obtain accurate information and deal with the complex bureaucracy that surrounds them. By providing self-help services to caregivers seeking legal guardianship and adoption for the children in their care, these caregivers will have access to accurate information and resources that is currently not readily available. Only a limited number of caregivers are able to find individual representation if they have been denied financial benefits such as adoption assistance or KinGap, or they choose to seek out assistance with their adoption finalization, at which time they will receive a holistic assessment regarding the benefits the children are currently being provided by the county. However, this happens only for a small portion of the families and much later in the process. With over 2000 caregivers in the process of trying to finalize adoption or guardianship in any given month through DCFS, many caregivers are left in the unfortunate situation of signing agreements with DCFS without the benefits of counsel.

2. Project Impact

A successful proposal will clearly describe the needs of the targeted population and how anticipated outcomes and related budget 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. Program's Qualifications

What is the applicant program's experience providing assistance to self-represented litigants, including court-based services? (250 word limit)

This Clinic seeks to expand the Alliance's successful benefits program which has recovered more than \$35 million in retroactive and prospective benefits for caregivers impacted by the children welfare system since the program started in 2002. It would allow an overlooked population of self-represented caregivers to have early access to information and resources to help them be informed of their rights to benefits for the children in their care. The goals are to remove barriers to permanency, and reduce the need for fair hearings if the matters can be resolved through front-end assessments, requests for benefits for children with special needs, and negotiations with the county to resolve the cases without the need to file for fair hearing. The Alliance would provide caregivers with self help materials, help them request assessments with the county, and review proposed benefits agreements for adoptions assistance or KinGAP benefits. These are currently advocacy skills the Alliance provides on a one - on - one basis through direct representation. Through this self-help clinic model, the goal is to reach more caregivers, and help them be able to advocate on their own to resolve these matters more quickly.

b. Needs Assessment

b.1. Does the project seek to serve a particular demographic group? If so, identify the groups:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Children & Youth | <input type="checkbox"/> Domestic Violence Survivors |
| <input type="checkbox"/> Homeless | <input type="checkbox"/> Immigrants |
| <input type="checkbox"/> Incarcerated Individuals | <input type="checkbox"/> LGBTQ |
| <input checked="" type="checkbox"/> Limited English Proficiency | <input type="checkbox"/> Low-Income Landlords |
| <input type="checkbox"/> Low-Income Tenants | <input checked="" type="checkbox"/> Low Wage Workers |
| <input type="checkbox"/> Migrants | <input checked="" type="checkbox"/> Persons of Color |
| <input checked="" type="checkbox"/> Persons with Physical or Mental Health Disabilities | <input type="checkbox"/> Qualified Legal Services Providers |
| <input type="checkbox"/> Re-entry | <input type="checkbox"/> Refugees & Asylum |
| <input type="checkbox"/> Rural | <input checked="" type="checkbox"/> Seniors |
| <input type="checkbox"/> Sexual Assault Survivors | <input type="checkbox"/> Trafficking Survivors |
| <input type="checkbox"/> Veterans & Active Military | <input type="checkbox"/> Other |



b.2. Describe the geographic area(s) to be served by the project:

Los Angeles County

b.3. Describe why the target population is in particular need of the services to be provided:

Funding for families impacted by foster care is a critical part of the stability and even viability of foster placements, especially those with relative and non-related extended family member (NREFM) caregivers. Yet, funding eligibility and rates are complex, opaque, and easily misunderstood. This dynamic is especially concerning when foster care cases approach permanency, be that legal guardianship or adoption. Too often, permanency is delayed (or, in extreme cases, derailed) because of uncertainty surrounding funding. There are many factors to assess such as the appropriateness of the current rate; how the rate may be impacted with a change in placement; and access to rightful Level of Care/Specialized Care support. The Alliance's Benefits Program provides direct services advocacy to address such issues, but we currently are only able to address a small fraction of such cases that come to us through our intake process. By creating this Permanency Benefits Clinic, in partnership with the Court, we will be able to support more families to help inform them to represent themselves and make informed decisions for their individual circumstances prior to finalizing their adoptions or legal guardianships.



c. Types of Services to be Provided

Describe the legal issues to be addressed and the type and level of services to be offered by the project.
(250 word limit)

The Clinic will address funding eligibility and rate issues for foster caregivers who are approaching or have obtained permanency through legal guardianship or adoption. Specific examples of such issues include the following:

- Whether funding is being proposed at the appropriate rate once permanency is granted, based on the type and severity of the youth's special needs
- Whether initial eligibility for permanency funding has been correctly determined
- Whether eligibility for funding after the youth's 18th birthday has been secured, as appropriate
- Whether funding eligibility and rate was properly determined during the foster care period prior to when the funding starts(ed) for permanency
- Whether a home approval issue continues to impact permanency funding eligibility.

Services provided will include:

- Informal counsel and advice (without court or hearing representation)
- Self-help materials in English and Spanish to help caregivers understand what adoption assistance and KinGAP payments are and how to advocate for the correct rate based on the needs of the child in their home.
- Self-help materials to advocate for fair hearings when the correct rate has been denied.
- Referrals to the Alliance's Benefits Program for further advocacy where appropriate.

d. Language Access

d.1. Other than English, what languages will services be offered?

- | | | |
|---|------------------------------------|---|
| <input type="checkbox"/> American Sign Language | <input type="checkbox"/> Arabic | <input type="checkbox"/> Eastern Armenian |
| <input type="checkbox"/> Western Armenian | <input type="checkbox"/> Cantonese | <input type="checkbox"/> Farsi |
| <input type="checkbox"/> Hmong | <input type="checkbox"/> Japanese | <input type="checkbox"/> Khmer |
| <input type="checkbox"/> Korean | <input type="checkbox"/> Mandarin | <input type="checkbox"/> Portuguese |
| <input type="checkbox"/> Punjabi | <input type="checkbox"/> Russian | <input checked="" type="checkbox"/> Spanish |
| <input type="checkbox"/> Tagalog | <input type="checkbox"/> Thai | <input type="checkbox"/> Vietnamese |
| <input type="checkbox"/> Other | <input type="checkbox"/> None | |



d.2. How are language services offered?

In person, via telephone by bilingual staff, as well as printed materials available online that are provided in Spanish.

d.3. Briefly describe the language capabilities among program staff.

The three legal assistants who currently are assigned to the Benefits Program are all bilingual in Spanish. They provide support to the attorneys assigned to the program with oral and written translation for those clients in need.

e. Coordination Efforts

Describe the current and planned coordination and collaboration on this project with other legal services providers, or other community organizations. (250 word limit)

For the past year, the Alliance's Benefits Program has been running a virtual monthly clinic for the attorneys of Children's Law Center (CLC). CLC attorneys can either pre-submit questions to the Alliance before the clinic or ask their questions during the clinic. Alliance attorneys answer the questions for the group's benefit and encourage referrals to the Benefits Program when appropriate. The clinic typically has between 50-100 CLC attorney attendees and has been a successful vehicle for collaboration between the Alliance and CLC.

The Permanency Benefits Clinic would work very well in tandem with the CLC clinic. CLC attorneys would be able to refer caregivers to the Permanency Benefits Clinic, especially as permanency approaches. Moreover, the Alliance would then be able to disseminate new and updated information to both CLC attorneys and caregivers on a regular basis.

f. Proposed Services

f.1. Individual Services

f.1.a. Total number of individuals to be served (do not include family members and others impacted):

0



f.1.b. Select the applicable services that will be provided (select all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Information on Legal Options | <input type="checkbox"/> Information on Court Procedures and Hearing |
| <input type="checkbox"/> Document Preparation and Review | <input type="checkbox"/> Filing or Services Assistance |
| <input type="checkbox"/> Supervised Settlement Services | <input type="checkbox"/> Post-Hearing Assistance |
| <input type="checkbox"/> Other | |

f.1.c. Format/Description:

f.2. Workshops

f.2.a. Total number of workshops planned:

0

f.2.b. Total number of individuals expected to attend workshops (do not double count those served through individual services or self-help clinics):

0

f.2.c. Select the applicable services that will be provided:

- | | |
|--|--|
| <input type="checkbox"/> Information on Legal Options | <input type="checkbox"/> Information on Court Procedures and Hearing |
| <input type="checkbox"/> Document Preparation and Review | <input type="checkbox"/> Filing or Services Assistance |
| <input type="checkbox"/> Supervised Settlement Services | <input type="checkbox"/> Post-Hearing Assistance |
| <input type="checkbox"/> Other | |

f.2.d. Format/Description:

f.3. Self-Help Clinics

f.3.a. Total Number of Clinics Planned:

30



f.3.b. Number of individuals to be served at clinics (do not double count with individual services or workshops):

200

f.3.c. Select the applicable services that will be provided:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Information on Legal Options | <input checked="" type="checkbox"/> Information on Court Procedures and Hearing |
| <input checked="" type="checkbox"/> Document Preparation and Review | <input checked="" type="checkbox"/> Filing or Services Assistance |
| <input type="checkbox"/> Supervised Settlement Services | <input checked="" type="checkbox"/> Post-Hearing Assistance |
| <input type="checkbox"/> Other | |

f.3.d. Format/Description:

The caregivers will be provided an overview of what benefits they are entitled to under the law through adoption and or legal guardianship. Each case is unique base on the age of the child, their relationship to the caregiver, and the child's special needs if any. Therefore all of these issues must be reviewed with the caregiver for the caregiver to understand how the rate is determined and whether it is correct for their individual circumstances.

The Alliance will help the caregivers draft requests for assessments from DCFS or from medical or service providers to support specialized rates. The Alliance will also provide templates for caregivers to draft these requests themselves. All self-help materials will be provided in English and Spanish. Staffers will also review benefits documents that caregivers bring to the Clinic, i.e. provide explanation of the documents and review documents for accuracy. Examples of such documents are Adoption Assistance Program Agreements and Kin-GAP (legal guardianship) agreements.

**f.4. Total number of 200
individuals to be served
(auto-calculated):**



g. Project Goals

Briefly describe the goal(s) for this project.

Alliance proposes to create a Permanency Benefits Clinic to provide access to critical information for self-represented caregivers seeking adoption or legal guardianship of the children in their care. The goals of the Clinic would be to: 1) Provide information to self-represented caregivers regarding their rights and opportunities to access public benefits; 2) Help caregivers self advocate to obtain public benefits to which the children are entitled based on their specific needs; and 3) Reduce delays for caregivers and children seeking to exit the foster care system, by identifying and resolving benefits agreements, which are prerequisites to completing adoptions and legal guardianships. The Clinic would be located at the Courthouse, where Alliance attorneys would provide consultation for self-represented caregivers. The Clinic will be open once a week and alternate between in-person and virtual clinic days. The days and times will be arranged with the court. Clinic staffers will provide caregivers with self-help materials in English and Spanish and refer cases to the Alliance Benefits Program for further advocacy. The Clinic's primary client population would be caregivers, however, Clinic staff could provide consultation as needed to counsel and the court.

h. Outreach & Community Engagement

h.1. Outreach

Describe how you will communicate the availability of services to litigants and the community. (250 word limit)

The Alliance will work with Court and the children's attorneys at CLC will help provide referrals and publication of this new clinic. Additionally, as noted earlier the monthly clinic held for minor's counsel is another opportunity to publicize this new resource. The Alliance also works closely with a number of stakeholder groups which will allow us to publicize this clinic. The Alliance will provide an informational flyer (electronically and/or hard copy) to stakeholder groups, including: the Dependency Court, CLC, Community Coalition, Kinship Council, County Counsel, DCFS, and others. The Alliance holds monthly webinars and sends out electronic newsletter updates which can include the flyer. The information will be posted on the Alliance's website and provided to caregiver's through our Intake Department.



h.2. Outreach Resources

Identify any new resource materials to be developed, who will be responsible for preparing those materials, and how they differ from materials already posted, i.e., at www.courts.ca.gov. (250 word limit)

The Alliance has identified these materials as necessary for this Clinic to be developed in English and in Spanish.

these materials do not currently exist on the self-help materials.

1. Benefits at a Glance rate guide for children in foster care
2. Self-advocacy guide for filing for and advocating at an administrative fair hearing if your benefits have been denied or you disagree with the County's assessment for foster care benefits
3. FAQs for Legal Guardianship funding
4. FAQs for AAP funding

3. Administration

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.

a. Grant Year Timetable

For existing and new projects, describe the proposed timetable for the implementation or continued administration of the project by quarter for the grant year. Indicate if any significant changes to existing operations are anticipated. (250 word limit)

Q1 (January-March): 1. Hire/Train Attorney and Program Assistant

(250 word limit)

2. Develop materials in English and Spanish
3. Set schedule with Court for Weekly Clinic
4. Start Outreach for launch of Clinic
5. Set schedule for regular meetings with Court
6. Set up Clinic space in Courthouse
7. Draft evaluation materials for program



Q2 (April-June): 1. Begin weekly Clinics (alternating virtually and in person)

(250 word limit)

2. Continue to publicize hours and services of Clinic
3. Review and refine materials
4. Meet with Court to discuss the clinics and any concerns or issues
5. Start evaluation of program with caregivers and court.

Q3 (July-September): 1. Hold weekly Clinics (alternating virtually and in person)

(250 word limit)

2. Continue to publicize hours and services of Clinic
3. Review and refine materials
4. Meet with Court to discuss the clinics and any concerns or issues
5. Continue evaluation of program with caregivers and court.

Q4 (October-December): 1. Hold Weekly Clinics (virtually and in person)

(250 word limit)

2. Continue to publicize hours and services of Clinic
5. Complete evaluation of program with caregivers and court.
4. Meet with Court to discuss the Clinic Model and any concerns or issues that arose in the first year.

b. Staffing

b.1. Identify key personnel involved in staffing and supervising this project.

The Managing Attorney of the Benefits Program will oversee the implementation of this project with assistance from the Vice President of Legal and Program Services. The Alliance will hire a new staff hire to help support this additional work. The Alliance will rely on our current legal assistants on the benefits program to help staff the Clinic.

b.2. Will supervision be provided on-site?

☒ Yes

☐ No



b.2.a. If yes, describe the steps that will be taken to ensure quality control.: The Vice President of Legal and Program Services supervises all of the Legal Programs at the Alliance and meets regularly with every program to review program goals, difficult cases, and systemic issues. When developing a new project the VP would be meeting regularly to discuss implementation with the team, to hear any barriers or concerns. The Managing Attorney of the Benefits Program holds weekly Program Meetings, and will be supervising the Clinic as well. Initially, the Managing Attorney will be attending all Clinics. Only once the new attorney is sufficiently trained would the attorney be allowed to run the Clinic on their own, and this person would still report into the Managing Attorney.

c. Supervision of Volunteers

c.1. Will volunteers be utilized for this project?

- ☒ Yes
- ☐ No

c.1.a. If yes, please describe their anticipated role.: The Alliance relies heavily on student volunteers throughout the year and especially during the summer. The students assigned to the benefits program would be trained to assist with the self-help clinic during their time with the Alliance. Similar to our students who work with intake and our programs, the students would be trained to gather initial information to help assess the cases, obtain documentation, present the case to the supervising attorney, help caregivers fill out forms, provide self-help materials, in addition to other tasks that may arise.



c.2. Briefly describe how volunteers will be trained and supervised.: We provide extensive training and supervision to our volunteers. Our Pro Bono Director and Volunteer Outreach Assistant coordinate trainings, ensure that all volunteers receive training materials, facilitate communication between volunteers and staff, and check in with volunteers to ensure they are having a positive experience. Volunteers receive both formal and on-the-job training and work under the direct supervision of Alliance legal staff. Our training program for volunteers covers intake procedures, conflict issues, issue spotting, client management, the dependency system, and the court system. Volunteers are provided live training by video conference in addition to written materials. Volunteers working with a specific legal program typically undergo the intake training described above. In addition, they receive live formal training and written training materials in the relevant substantive area of law. Legal staff in the relevant program closely review all written work products prepared by volunteers, direct all legal strategy, and monitor client communications. All students assigned to programs participate in case reviews and attorney meetings for their respective programs, as well as all-program meetings with the Vice President of Legal and Program Services. We updated our Prime case management system to provide additional security measures to address the remote environment in which we are working and to facilitate supervision of students and volunteers. These modifications allow students to access only cases assigned to them by their supervisors, and allow supervisors to provide constructive feedback on the students' work product to ensure the quality of their case work and promote their professional growth.

d. Sub-Grants

Provide details for any sub-grant(s), including plans for oversight and evaluation of the services provided by the sub-grantee. (250 word limit)

N/A



e. Pro Se Document Review

How will the project ensure that documents are completed correctly? Who will conduct the review and when? (250 word limit)

All work completed by the clinic will be supervised by an experienced Alliance benefits attorney. Specifically any legal documents such as funding agreements between the caregiver and the county would need to be reviewed by an Alliance Attorney. However, providing samples on how to request information from the county or other providers as first steps to help facilitate the process to finalize a funding agreement can be done by trained and supervised legal assistants and students.

f. Eligibility for Services

f.1. Identify all criteria and guidelines used to establish eligibility for services and how the project screens for eligibility for services. The majority of children in foster care meet the criteria for low-income assistance under Title IV-E of the Social Security Act (42 U.S.C. § 670 et seq.). Title IV-E requires that the foster child and parent(s) meet specific qualifications based on the family's qualifications for financial assistance at the time the child was removed from the parent(s) home. All our clients are at or below 200% of the federal poverty level. All caregivers will be direct referrals for children in the foster care system seeking permanency of those children, from the court, minor's counsel or DCFS.
(250 word limit):

f.2. Will this project serve non-indigent persons?: ☐ Yes
☒ No

f.3. Identify any resources or referrals to be provided to litigants who are not eligible for this project's services. As noted above, as the referrals will be coming directly from the court, minor's counsel and DCFS for caregivers in the foster care system seeking permanency for children in their care; it is unlikely that caregivers would not qualify for our self help services being offered. Caregivers seeking direct representation would be provided referrals, or caregivers who seek assistance too early in the process to address permanency benefits will be asked to return when the case is at the right phase so they can be assisted with those benefits and provided appropriate referrals for other benefits issues.
(250 word limit):

g. Attorney-Client Relationship



**g.1. Will this project No
establish an attorney-
client relationship?:**

g.1.b. If no, explain how All participants of the self-help clinic will be advised that the Alliance is not
self-represented litigants providing direct representation, and that no attorney client relationship is
will be made aware of the being provided at the outset only self help assistance. Clients seeking direct
scope of service to be representations will be provided referrals to other agencies and or the
provided and that no Alliance's intake department to go through the full conflict and assessment
attorney-client process. Before direct representation could be provided, the caregiver and
relationship will be the Alliance would have to execute a retainer agreement -- but that process
established (250 word would not be conducted at the self-help clinic.
limit):

This response will be included in the Letter of Support template on Form F of this application.

h. Impartiality of the Court

**h.1. Impartiality of the Yes
Court:**

Will this project serve only one party or side of a matter?



h.2. Identify which side will be served, and why the project has established this limitation? What are the social implications of this decision? How will this project address any risk to the appearance of the court's impartiality as a result of limiting services to one side of these matters? (250 word limit): Foster parents seeking permanency through legal guardianship or adoption will be provided assistance through this Clinic. As noted above, the foster parents are not parties to the proceedings during the jurisdictional and reunification stages of the dependency proceedings, leaving the Court in the difficult position of having to provide information for self-represented caregivers and no agency to send them for information or representation across the board. These caregivers often struggle to obtain accurate information and understand or navigate the complex bureaucracy which surrounds them. This clinic seeks to create a new resource for these self-represented caregivers that are the backbone of the foster care system. By providing self-help services to caregivers seeking permanency, the caregivers will have access to accurate information and resources that is currently not readily available except to a limited number of caregivers that are able to find individual representation once they have been denied a financial benefit such as adoption assistance or KinGap, or they choose to seek our assistance with their adoption finalization, at which time we will assess whether they are receiving the proper benefits. However, this leaves many caregivers without access to timely accurate information about the financial benefits the children in their care are entitled. The Alliance is unable to provide direct representation to the more than 2,000 caregivers in LA County seeking adoption and legal guardianship every year. Helping the caregivers learn their rights and advocate for themselves will help more caregivers and children.

This response will be included in the Letter of Support template on Form F of this application.

4. Continuity Planning

A successful proposal will address whether its proposed services can continue with funds other than those provided by Partnership Grants and provide details of past efforts and future plans to secure such alternate funding.

Refer to RFP requirements regarding funding priorities.



a. Describe plans to obtain funding that will sustain this project's services beyond the typical Partnership Grant funding cycle. (250 word limit)

The Alliance intends to maintain programs it develops and has never had to discontinue programming due to a lack of funding. As this proposed work is in line with some of the other initiatives the Alliance is currently developing and seeking support for, we can foresee synergy with those sources of funding in the future, should we be able to get this program initially funded by the State Bar.

b. List all funding sources that have been explored or pursued for this Partnership Grant project in the last twelve months.

Specifically identify applications submitted, amounts requested, revenue raised for project operations, and any funds that were obtained by leveraging the Partnership Grant. This section may also be used to explain any barriers to pursuing funds. (250 word limit)

As this is a new project, we are currently discussing other possible sources of funding for this project. However, we believe with initial funding by the State Bar that we will be able to leverage that support to gain additional contributions for this program.

c. Other Efforts

Describe any other efforts to support continuity planning, such as recruitment of volunteers or pursuing in-kind support (250 word limit)

We will continue to develop our relationship with the Court to secure space as needed for in-person clinics. Additionally, we maintain and will continue to maintain a large network of pro bono lawyers and student volunteers to provide our services, which would include services delivered through this proposed program.

5. 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.



Projects must submit detailed reporting and evaluation materials after each grant year. These will include an expenditures report, information on the demographics of clinic customers, findings from client satisfaction surveys, a report on meetings with court partners, and at least one additional evaluation modality.

a. Project Services

1. Upload a copy of your most recent Partnership Grant Evaluation

2. For existing projects, provide a brief summary of services provided in the current year with any relevant highlights, benchmarks, challenges, etc. What changes have been made to the project over the past year, and what changes are anticipated in the upcoming grant year?

This is a new grant proposal.

b. Satisfaction Surveys

1. Upload a copy of the Satisfaction Survey now in use, or a proposed survey to be implemented in the coming grant year

2. Describe how the survey will be distributed, and how data will be gathered and analyzed. (250 word limit)

The Alliance has conducted satisfaction surveys in the past with the court, minor's counsel, and DCFS. We would modify this prior survey to evaluate this project in conjunction with the current self-help surveys that are used. They would just need to be modified for this specific program area. The plan would be for surveys to be conducted with caregivers and the Court to evaluate the success of the model and approach.



c. Identify at least one additional evaluation methodology to be used in assessing the impact or efficacy of this project's services. (250 word limit)

The Alliance will also track number of attendees, number of services provided (including demographic information and the types of issues that we assist them with), and the resources available to meet the caregiver's needs.

Form C - Project Budget

Program Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
1. Lawyers	\$72,400	\$0	\$14,424	\$86,824
2. Paralegals	\$34,350	\$0	\$1,718	\$36,068
3. Other Staff	\$13,750	\$0	\$138	\$13,888
4. SUBTOTAL	\$120,500	\$0	\$16,280	\$136,780
5. Employee Benefits	\$27,715	\$0	\$3,720	\$31,435
6. TOTAL PROGRAM PERSONNEL	\$148,215	\$0	\$20,000	\$168,215

Program Non-Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
7. Space	\$0	\$0	\$8,000	\$8,000
8. Equipment Rental and Maintenance	\$0	\$0	\$0	\$0
9. Office Supplies	\$0	\$0	\$700	\$700
10. Printing and Postage	\$0	\$0	\$700	\$700
11. Telecommunications	\$0	\$0	\$5,000	\$5,000
12. Technology	\$0	\$0	\$10,000	\$10,000
13. Program Travel	\$0	\$0	\$300	\$300
14. Training	\$0	\$0	\$300	\$300
15. Library	\$0	\$0	\$0	\$0



16. Insurance	\$0	\$0	\$0	\$0
17. Evaluation	\$0	\$0	\$0	\$0
18. Contract Service to Clients	\$0	\$0	\$0	\$0
19. Other	\$0	\$0	\$0	\$0
20. TOTAL PROGRAM NON-PERSONNEL	\$0	\$0	\$25,000	\$25,000
TOTAL PROGRAM	\$148,215	\$0	\$45,000	\$193,215
Administrative and Overhead				
21. Admin Personnel	\$14,785	\$0	\$0	\$14,785
22. Admin Non-Personnel	\$0	\$0	\$0	\$0
TOTAL ADMINISTRATIVE	\$14,785	\$0	\$0	\$14,785
TOTAL AMOUNT OF FUNDS	\$163,000	\$0	\$45,000	\$208,000

1. Lawyers

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Vice President, Legal & Program Services	0.05	0.00	0.05	0.10
Benefits Manager	0.15	0.00	0.15	0.30
Staff Attorney	0.65	0.00	0.35	1.00
TOTAL LAWYERS	0.85	0.00	0.55	1.40

2. Paralegals

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Paralegals	0.65	0.00	0.15	0.80
	0.00	0.00	0.00	0.00
TOTAL PARALEGALS	0.65	0.00	0.15	0.80

3. Other Staff

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
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President & CEO	0.05	0.00	0.05	0.10
	0.00	0.00	0.00	0.00
TOTAL OTHER STAFF	0.05	0.00	0.05	0.10
TOTAL PERSONNEL (in FTEs)	1.55	0.00	0.75	2.30

Form D - Budget Narrative

Personnel

Account Title	Proposed Partnership Grant	Narrative
		Vice President, Legal and Program Services (.05 FTE): Supervises new program development, and program services, including case review and training staff regarding changes in the law. Reports to President and CEO.
		Benefits Program Manager (.15 FTE): Oversees the implementation of the Benefits Clinic and supervises the new staff attorney and legal assistants. Leads the development of new self-help materials. Oversees Program Evaluation. Reports to the VP of Legal and Program Services.
1. Lawyers	72400	Benefits Staff Attorney (.50 FTE): Will be the primary position to conduct the Benefits Clinics. Assists with the development of new self-help materials. Assists with Program Evaluation. Reports to the Benefits Manager.
		Benefits Staff Attorney (.15 FTE): Will be a support position to assist with conducting the Benefits Clinics. Assists with the development of new self-help materials. Assists with Program Evaluation. Reports to the Benefits Manager.



2. Paralegals	34350	Benefits Program Paralegals (.25 FTE and .20 FTE and .20 FTE): Conducts Clinic interviews of caregivers, including for Spanish-speaking clients; helps obtain documentation from caregivers and provides self-help materials. Reports to the Benefits Program Manager.
3. Other Staff	13750	President & CEO (.05 FTE): Oversees all program development and provides high-level oversight of programmatic operations.
4. SUBTOTAL	120500	
5. Employee Benefits	27715	23% Staff Benefits
6. TOTAL PROGRAM PERSONNEL	148215	

Non-Personnel

Account Title	Proposed Partnership Grant	Narrative
7. Space	0	The Court will provide in-kind space for our in-person Clinics.
8. Equipment Rental and Maintenance	0	
9. Office Supplies	0	
10. Printing and Postage	0	
11. Telecommunications	0	
12. Technology	0	
13. Program Travel	0	
14. Training	0	
15. Library	0	
16. Insurance	0	
17. Evaluation	0	
18. Contract Service to Clients	0	
19. Other	0	
20. TOTAL PROGRAM NON-PERSONNEL	0	

Administrative



21. Admin Personnel

14785

Grants Director (.05 FTE): Oversees and leads the development of all funding proposals and reports - including programmatic concept development, letters of inquiry, project planning, and composing. Refines and manages all grant-making processes, including grant policies, systems, and documentation, incorporate best practices, and ensures excellent controls. Reports to Chief Development Officer.

Controller (.05 FTE): Manages bookkeeping, accounting, and day-to-day financial procedures - including budgets for grants. Creates budgets and maintains appropriate workpapers. Reports to Chief Financial Officer.

22. Admin Non-Personnel

0

TOTAL ADMINISTRATIVE

14785

TOTAL AMOUNT OF FUNDS

163000

Form E - Project Assurances

Download the Assurances document and upload a signed copy below.

Upload PDF Version of
Signed Assurances
Document:

Alliance_-_March_2023_Project_Assurances_Court_Partnership_-_signed.pdf
224.3 KB - 03/17/2023 11:35AM

Total Files: 1

Form F - Agreement of the Partner Court

Any uploaded Letter(s) of Support and MOU are listed below and also attached at the end of this pdf.



1. Upload Letter(s) of
Support:

Form_F-Agreement_of_the_partner_court_-_PC_-_CC_31723.pdf
167.7 KB - 03/17/2023 6:53PM

Total Files: 1

2. Upload MOU(s):

Refer to application
instructions for MOU
requirements.

MOU Expiration Date or
Continuing:

Opportunity ID: 12993208

Staff Review

Project Budget: No Revision Required

**Signed Assurances
Document:**

Court Letter(s) on File:

MOU(s) Approved:

**MOU Expiration Date or
Continuing:**

**All Services at
Courthouse:**

**Application Review
Complete:**



Second Cycle:

PARTNERSHIP GRANTS 2024 PROJECT ASSURANCES

Program Name: Alliance for Children's Rights
Project Title: Permanency Benefits Clinic Court Partnership

Applicant assures compliance with the following:

1. Applicant agrees it will use any grant funds it receives from the Partnership Grants portion of the Equal Access Fund only for purposes allowed under the State Budget Act, upon approval thereof, and any grant agreement it enters into with the State Bar of California.
2. Applicant agrees to expend any grant funds solely on civil legal assistance to indigent* self-represented litigants in California courts. (*Business & Professions Code Section 6213(d))
3. Applicant will not discriminate based on race, color, national origin, religion, gender, disability, age, marital or domestic partnership status, medical condition, or sexual orientation.
4. Applicant will comply with quality control procedures adopted by the State Bar of California.
5. Applicant will permit reasonable site visits and will present additional information deemed reasonably necessary to determine compliance with the terms of a grant under the Partnership Grants portion of the Equal Access Fund.
6. Applicant will comply with fiscal management and control procedures adopted by the State Bar of California.
7. Applicant agrees to consult with the State Bar of California concerning media coverage of any project funded by a Partnership Grant.
8. Applicant understands that any proposal submitted for a Partnership Grant, and all documents submitted pursuant to issuance of a Partnership Grant, are public documents, and may be disclosed to any person.
9. Applicant assures that, to the extent this grant is being sought for an existing project, the funds will be in addition to, and will not supplant, current funding committed to that project. However, to the extent the applicant seeks to move some of the funding already committed to the project for use on other activities, the applicant will submit to the Commission an explanation of the need for the other activities, justifying the alternate use of the funds.
10. Applicant agrees it will cooperate with data collection processes or with research efforts of the State Bar of California or the Judicial Council to evaluate the Partnership Grants project.

11. Applicant acknowledges that it has read and will comply as fully as possible with the Guidelines for the Operation of Self-Help Centers in California Trial Courts, as affirmed February 28, 2011.

Signed:



Executive Director
Alliance for Children's Rights

Jennifer L. Braun

Print Name

Mar 10, 2023

Date: _____



Alan Epstein (Mar 16, 2023 09:47 PDT)

Chair (or other officer), Board of Directors
Alliance for Children's Rights

Alan J. Epstein, Co-Chair of the Board of Directors

Print Name and Title

Mar 16, 2023

Date: _____











Alliance - March 2023 Project Assurances Court Partnership

Final Audit Report

2023-03-16

Created:	2023-03-07
By:	Mary Prall (M.Prall@kids-alliance.org)
Status:	Signed
Transaction ID:	CBJCHBCAABAAySzm6RSil8p_KvSvNyfLsD5qw_vGxsm

"Alliance - March 2023 Project Assurances Court Partnership" History

-  Document created by Mary Prall (M.Prall@kids-alliance.org)
2023-03-07 - 11:01:59 PM GMT- IP address: 75.82.69.223
-  Document emailed to Jen Braun (jbraun@alliancecr.org) for signature
2023-03-07 - 11:02:35 PM GMT
-  Email viewed by Jen Braun (jbraun@alliancecr.org)
2023-03-11 - 1:50:47 AM GMT- IP address: 104.47.73.254
-  Document e-signed by Jen Braun (jbraun@alliancecr.org)
Signature Date: 2023-03-11 - 1:51:17 AM GMT - Time Source: server- IP address: 47.156.171.148
-  Document emailed to aepstein@willkie.com for signature
2023-03-11 - 1:51:18 AM GMT
-  Email viewed by aepstein@willkie.com
2023-03-11 - 4:15:08 AM GMT- IP address: 45.49.243.24
-  New document URL requested by Mary Prall (M.Prall@kids-alliance.org)
2023-03-16 - 4:41:10 PM GMT- IP address: 75.82.69.223
-  Email viewed by aepstein@willkie.com
2023-03-16 - 4:46:34 PM GMT- IP address: 166.199.97.6
-  Signer aepstein@willkie.com entered name at signing as Alan Epstein
2023-03-16 - 4:47:27 PM GMT- IP address: 166.199.97.6
-  Document e-signed by Alan Epstein (aepstein@willkie.com)
Signature Date: 2023-03-16 - 4:47:29 PM GMT - Time Source: server- IP address: 166.199.97.6

✔ Agreement completed.

2023-03-16 - 4:47:29 PM GMT

Names and email addresses are entered into the Acrobat Sign service by Acrobat Sign users and are unverified unless otherwise noted.

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Permanency Benefits Clinic Court Partnership

Organization: Alliance for Children's Rights

My court has had an opportunity to review the applicant’s abstract describing proposed services to self-represented litigants in partnership with my court. I fully support the grant proposal as described below:

1. Project Abstract:

Funding for families impacted by foster care is a critical part of the stability and even viability of foster placements, especially those with relative and non-related extended family member (NREFM) caregivers. Yet, funding eligibility and rates are complex, opaque, and easily misunderstood.

To address this need, and in partnership with the Edmund D. Edelman Children’s Courthouse in Monterey Park, the Alliance is proposing to create a Permanency Benefits Clinic to provide access to this critical information for unrepresented caregivers as they are moving towards permanency. The goals of the Clinic would be to: 1) Provide funding information to unrepresented caregivers approaching permanency before the permanency hearing occurs; 2) Help Caregivers advocate to resolve these issues before the permanency hearing occurs; and 3) Reduce delays in granting permanency by identifying and resolving such issues more quickly than is currently possible. The Clinic would be provided both in-person and virtual, staffed by Alliance attorneys and support staff, and held weekly ; date and time to be set with the court. Referrals would be primarily driven by the Court and Children’s Law Center (CLC). The Court would also provide the space for in-person clinics and provide public support of the Clinic. Clinic staffers will provide caregivers with self-help materials in English and Spanish and refer cases to the Alliance Benefits Program that need further advocacy. And, while the Clinic’s primary client population would be caregivers, Clinic staffers would also be available to consult with the Court, CLC, and DCFS attorneys and staff as needed.

2. Attorney-Client Relationship:

I understand the applicant does not plan to establish an attorney-client relationship and that customers will be made aware of the scope of services, as follows: All participants of the self help clinic will be advised that the Alliance is not providing direct representation, and that no – attorney client relationship is being provided at the outset only self help assistance. Clients seeking direct representations will be provided referrals to other agencies and or the Alliance’s intake department to go through the full conflict and assessment process. Before direct representation could be provided the caregiver and the Alliance would have to execute a retainer agreement.

3. Impartiality of the court:

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Permanency Benefits Clinic Court Partnership

Organization: Alliance for Children's Rights

Applicant has advised the court of which side will be served and explained the reasons for this decision, the steps taken to explore all implications of the decisions, and to address any risk of impropriety on the court's part as follows: The unrepresented foster parents seeking permanency through legal guardianship or adoption will be provided assistance through this clinic. As noted above, they are not parties to the proceedings while they are considered foster parents and not entitled to representation. This clinic seeks to remedy that issue by providing self-help assistance to these unrepresented critical caregivers that are the backbone of the foster care system, who struggle to obtain accurate information and deal with the complex bureaucracy which surrounds them. By providing self-help services to caregivers seeking permanency for the children in their care, the caregivers will have access to accurate information and resources that are currently not readily available except to a limited number of caregivers that are able to find individual representation once they have been denied a financial benefit such as adoption assistance or KinGap , or they choose to seek our assistance with their adoption finalization, at which time we will assess whether they are receiving the proper benefits. However, this leaves many caregivers without access to timely accurate information about the financial benefits the children in their care are entitled. The Alliance is unable to provide direct representation to the 4000 caregivers awaiting adoption, let alone the number of caregivers seeking guardianship every year as well.

4. Alternative Services: The applicant has described the methods to be used to screen for subject matter eligibility, and the information and referral options that will be available for litigants who are ineligible for services due to income, subject matter, or residency:

As noted above, as the referrals will be coming directly from the court, minor's counsel and DCFS for caregivers in the foster care system seeking permanency for children in their care it is unlikely that caregivers would not qualify for our self help services being offered. Caregiver's seeking direct representation would be provided referrals. Or caregivers who are not at a stage to address permanency benefits will be asked to return when they are ready to address those specific benefits and provided appropriate referrals for other benefits issues.

5. Memorandum of Understanding: I understand that, if the project is funded, the court and the applicant will memorialize the details of the partnership in a Memorandum of Understanding(MOU), which will reflect the depth of the partnership, including the respective areas of responsibility of the Court and the applicant, as well as plans for regular coordination meetings.

Status of MOU:

A fully executed MOU will be provided to the State Bar of California before the beginning of the grant year.

6. Additional Comments, if any:

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Permanency Benefits Clinic Court Partnership

Organization: Alliance for Children's Rights

Signature of Presiding Judge

Akemi Arakaki

Akemi Arakaki

Presiding Judge of the Juvenile Court

3/17/2023

Date



Grant Year: 2024

Due Date: March 17, 2023 5:00pm PST

Prepared by: Luisa Medina

Email: Luisa@centralcallegal.org

Contact Phone: 559-570-1242

Funding Opportunity: Partnership Grants

Project Title: Guardianship Project

Program Name: Central California Legal Services

Applicant Title: Development Director

Address: 2115 Kern Street Suite 200

City: Fresno

☒ I verify the information in the Organization Profile is accurate and up to date.

I verify that I have read, and am familiar with, the eligibility requirements and funding criteria for Partnership Grants.

Form A - Project Profile

Respond to the questions as concisely and completely as possible. All responses must be self-contained and should only refer to materials uploaded with this proposal.

1. Application Contact: Luisa Medina

Job Title: Development Director

Email: luisa@centralcallegal.org

Telephone: 559-570-1242

2. Total Amount \$90,000

Requested:

Request project amounts
divisible evenly by
\$1,000.



3. Partner Court(s)

Superior Court of California, County of Fresno.

**4. County(ies) Served by
this Project:**

County(ies) Served by this Project

Fresno

5. Substantive Area(s)

Guardianship

6. Is the project currently funded by a Partnership Grant?

Yes

**a. Project Name for CCLS Guardianship Project
Refunding:**

**b. Total number of years 8
funded by Partnership
Grants, including any gap
years:**

**c. Has this project been Yes
funded by Partnership
Grants for over 5 years?:**

If yes, please describe: The Guardianship project has provided assistance to eligible self-represented litigants since its inception. Individuals receive information on the process so they understand what is expected, assistance in completing and filing their forms and access to other available resources that may assist them. There are no changes to the project; we are anticipating the return of the clinics this program year via Zoom.



d. For project more than 5 years, does this project have any significant changes, such as change to location of host court or substantive focus?:

e. Does this project support unmet rural needs?:

If yes, please explain: The project serves all of Fresno County, including its many non-incorporated communities along with several small cities. A significant percentage of the residents these communities are Latinos whose income falls within the project income eligibility guidelines, and includes farmworkers and non-English speaking individuals. Fresno County is defined as "rural" with the exception of the Fresno-Clovis metro area. Project staff will emphasize outreach and project activities to residents living in the rural cities and unincorporated communities.



7. Project Abstract

Provide a brief summary of the core aspects of your proposed grant project, including the legal area to be addressed; the target constituency; the type(s) of services to be provided; the location and hours of operation for this project; project staffing; general nature of court participation; and main goals. Detailed information regarding these areas will be provided in Form B – Project Description. (250 word limit)

This project enjoys a successful record of assisting eligible self-represented litigants obtain guardianships for minor children, many of whom are already living with family or referred by Child Protective Services. Post-COVID, both parties are hopeful that the project will be fully operational by mid-2023. Staff members from the Fresno Superior Court Probate Division, the Fresno County Law Library, and CCLS will participate in twice-monthly clinics presented on first and third Friday mornings; however, the format of the clinics remains fluid with in-person clinics being the goal.

During the clinics, 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 clinic'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.

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.

Form B - Project Description

1. Court Involvement

A successful proposal will indicate 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.

A formal letter of support and memorandum of understanding must be uploaded to Form F. See Application



Instructions for detailed information about these documents.

a. Court Coordination

Describe the current and planned coordination and collaboration on this project with existing court-based services. (250 word limit)

The project collaborates with Court-based services (including the Probate Division, which refers litigants to the project), distributes informational flyers, and assists in the coordination of clinic sessions. Information about the project services is available on numerous web-based resources accessible to self-represented litigants. The staff from the Fresno County Law Library participate in the clinic and provide additional information to litigants that is available at their library.

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-12:30pm	8hrs clinics

c. Facilities and Court Resources

Identify all space and material resources being provided by the court, and any special access to facilities or data to be provided to the project or its staff. (250 word limit)

The Court is functioning under a new normal, providing both in-person and virtual services. The reopening of the courthouses is taking place in a "staggered" fashion, and we anticipate that services will continue to be offered remotely and virtually. Court staff members are working onsite, and our collaborative relationships are being conducted both in person and virtually.

The Court is willing to continue to work collaboratively with CCLS on the Guardianship program in providing services to unrepresented members of the public. 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.

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.



d. Regular Meetings

Project staff should meet no less than quarterly with key court partners, with a formal agenda. Identify the schedule for these meetings, who is expected to participate, and any issues currently to be resolved. (250 word limit)

The quarterly partners' meetings resumed via Zoom last summer and are continuing via Zoom. Meetings took place on August 11 and November 10 in 2022. This year, this quarterly meeting took place on February 9 with the next quarterly meeting scheduled for May 11. Printed agendas are distributed prior to the meetings where the partners discuss emerging trends, problems with forms, other clinic issues, and identifying needed changes to the materials or the presentation. Meeting participants include Court Probate Division staff members, the county law librarian, the project paralegal(s) and supervisor, the community partner, and social workers from the Fresno County Department of Social Services (DSS).

Quarterly partner meetings will continue to be held via Zoom.



e. Evaluation Support

The court is considered to be an equal partner in ensuring that the funded services are meaningfully evaluated. Identify the court's role in evaluating this project. (250 word limit)

In partnership with CCLS, the Court monitors the project's activities to ensure the project activities are aligned with the stated goals and objectives. The Court provides statistical data, upon request by CCLS, on the number of litigants who utilize the project services.

As part of the ongoing evaluation, CCLS staff tracks information that includes the number of attendees served individually and in the clinics (when resumed), the number of informational pamphlets distributed, and the number of litigants assisted individually with form completions. A customer satisfaction survey sent out by project staff assist in identifying the project's successes and areas for improvement.

At the conclusion of services, a more comprehensive client satisfaction survey is mailed to all litigants who received the individual assistance to provide their feedback as well. Once services are completed, the project paralegal sends the litigants copies of their guardianship orders, along with surveys, requesting that the petitioners fill out and return them. To facilitate this, she provides a self-addressed, stamped envelope for the litigants to return the completed survey. For the most part, she does receive the completed surveys, with the vast majority of those served indicating their satisfaction with the assistance provided by project staff.

The quarterly meetings contribute to the evaluation process by providing an opportunity for the partners to review services, make needed adjustments, share data, and address issues identified by the partners. CCLS staff shares project evaluations with Court staff members and reviews project goals at the quarterly meetings.



f. Describe if there are other aspects of court involvement that distinguish this project from other self-help clinics, or any court partnership information not provided above. (250 word limit)

The Probate Division Manager will complete the following activities to support the project:

Develop and insert project clinic information in all guardianship packets;

Orient judicial officers and staff members on project services;

Assist in the development of new printed materials.

The Court's Grant Manager will assist with the following activities in support of the project:

Assist in the development of any new printed materials;

Partner with CCLS for education and outreach activities.

The Probate Division has posted an additional web-based tool to assist self-represented litigants with online document completion, wherein litigants can learn about the process, fill out their petitions, and directly file their paperwork with the Court.

Prior to the onset of COVID-19, the Court had provided space for the weekly clinic sessions in its first-floor conference room at the B. F. Sisk Courthouse, as well as additional space in a smaller office on the second floor. Although the Court is now reopening to the public, CCLS's services remain virtual, with specific exceptions, and in-person project services are still on hold.

2. Project Impact

A successful proposal will clearly describe the needs of the targeted population and how anticipated outcomes and related budget 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. Program's Qualifications

What is the applicant program's experience providing assistance to self-represented litigants, including court-based services? (250 word limit)

CCLS has extensive experience serving self-represented litigants whose legal matters are in alignment with many aspects of our legal services, including assisting with conservatorships, restraining orders, and unlawful detainers. The organization has participated in the EAF Partnership Grant Program since its inception, most recently assisting self-represented litigants in unlawful detainers (Fresno) and family law matters in Fresno, Tulare, and Kings Counties. In addition, CCLS offers clinics in partnership with other community groups where litigants receive legal information, including monthly Workers' Rights, tenants' rights, and veterans' clinics, and an expungement clinic with support from pro bono attorneys, law student interns, and other volunteers.

Initially, the pandemic caused the elimination of our in-person clinics and also outreach and community legal education activities, many were moved to online platforms. Project staff pivoted to a one-on-one individual assistance model for self-represented litigants referred by the Court and the CCLS Legal Advice and Referral Line (LAL). It has taken longer than anticipated to resume the monthly clinics; however, the staff continues to make progress toward this end.

To access the project's services, self-represented litigants may call our toll-free LAL, visit the CCLS website, or apply online for services through our website portal. Individual appointments are made for those who express the need for one-on-one assistance. At present, our offices remain closed to the general public, with staff working remotely on an in-office hybrid schedule. It is anticipated a full return to in-person services will occur by mid-April.

b. Needs Assessment



b.1. Does the project seek to serve a particular demographic group? If so, identify the groups:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Children & Youth | <input type="checkbox"/> Domestic Violence Survivors |
| <input type="checkbox"/> Homeless | <input checked="" type="checkbox"/> Immigrants |
| <input type="checkbox"/> Incarcerated Individuals | <input type="checkbox"/> LGBTQ |
| <input checked="" type="checkbox"/> Limited English Proficiency | <input type="checkbox"/> Low-Income Landlords |
| <input type="checkbox"/> Low-Income Tenants | <input type="checkbox"/> Low Wage Workers |
| <input type="checkbox"/> Migrants | <input checked="" type="checkbox"/> Persons of Color |
| <input type="checkbox"/> Persons with Physical or Mental Health Disabilities | <input type="checkbox"/> Qualified Legal Services Providers |
| <input type="checkbox"/> Re-entry | <input type="checkbox"/> Refugees & Asylum |
| <input checked="" type="checkbox"/> Rural | <input checked="" type="checkbox"/> Seniors |
| <input type="checkbox"/> Sexual Assault Survivors | <input type="checkbox"/> Trafficking Survivors |
| <input type="checkbox"/> Veterans & Active Military | <input type="checkbox"/> Other |

b.2. Describe the geographic area(s) to be served by the project:

The project serves eligible individuals in Fresno County in partnership with the Court and the Fresno County Law Library. Project activities will emphasize reaching out to rural communities to fully serve the target population that include LEP and immigrants who would benefit from these services, and often have a more difficult time accessing digital services.



b.3. Describe why the target population is in particular need of the services to be provided:

Families in poverty lack resources to overcome challenges, and children suffer as a result. Drug addiction, mental illness, housing and income instability leading to high poverty rates represent the main reasons children enter foster care. During the pandemic, Fresno County experienced high rates of domestic violence, while we do not target these survivors, we do see children removed from the home and placed with relatives for their protection. Often it is grandparents and other family members who step up to avoid having the minors remain at further risk. Social workers attempt to locate safe placements with caring adults, encouraging them to pursue guardianships. All parties agree there is a great need for these services.

Guardianships for minor children play a key role, offering stability and a safe environment for children whose parents are not able to provide appropriate care. Placing a minor with a caring adult or family member preserves and strengthens family connections. Statewide policies support placement and avoid group homes. The project targets family members with minor children in their care and works closely with the DSS.

The foster care system in Fresno County struggles to locate suitable placements for children in their care, primarily due to high turnover and staffing shortages. Minority children represent the majority of children in foster care. From 2010-2019, Latino children entering the system increased from 52 to 56 percent, with a slight decrease from 18 to 16 percent for new African-American minors. These minors remain in the system longer, many up to three years or more. African-American minors represent 22 percent of the foster care population, even though they make up only 14 percent of the county's population, with Latinos representing 42 percent of the total foster care population.



c. Types of Services to be Provided

Describe the legal issues to be addressed and the type and level of services to be offered by the project.
(250 word limit)

In a clinic setting (via Zoom), self-represented litigants (petitioners and opponents) receive information about the process, what to expect, and how to file and prepare for the hearing. The forms are explained, with litigants taking notes to complete at a later time, and the sessions conclude with a question-and-answer period. Many litigants, especially Limited English-speaking individuals, have difficulty with the Court forms and have limitations in the digital world. To address these issues, clinic participants may be limited to allow sufficient time to address these issues and increase the comfort level of litigants going through this process.

Project staff continue to provide litigants with one-on-one assistance via telephone, email, or computer, if participants have reliable internet access. Those participants with smartphones may scan their petitions and send them via email or text, with staff members contacting them to clarify any information needed to complete the process. Litigants may drop off their information at the CCLS offices or request an appointment.

Staff members assist with completion of documents, filing, and service to ensure litigants obtain their final orders. Staff tracks the progress of the petition, and the petitioner is contacted with any concerns. Every Court filing is carefully reviewed prior to closing to ensure petitioners receive copies of all final documents.

Guardianship information is also available online from the Court's Self-Help Center, which provides project referrals and continued review of the petitions prior to filing. The Fresno County Law Library, along with the Court, routinely send litigants to the project.

d. Language Access



d.1. Other than English, what languages will services be offered?

- | | | |
|---|------------------------------------|---|
| <input type="checkbox"/> American Sign Language | <input type="checkbox"/> Arabic | <input type="checkbox"/> Eastern Armenian |
| <input type="checkbox"/> Western Armenian | <input type="checkbox"/> Cantonese | <input type="checkbox"/> Farsi |
| <input checked="" type="checkbox"/> Hmong | <input type="checkbox"/> Japanese | <input type="checkbox"/> Khmer |
| <input type="checkbox"/> Korean | <input type="checkbox"/> Mandarin | <input type="checkbox"/> Portuguese |
| <input type="checkbox"/> Punjabi | <input type="checkbox"/> Russian | <input checked="" type="checkbox"/> Spanish |
| <input type="checkbox"/> Tagalog | <input type="checkbox"/> Thai | <input type="checkbox"/> Vietnamese |
| <input type="checkbox"/> Other | <input type="checkbox"/> None | |

d.2. How are language services offered?

CCLS' policies ensure individuals identified as Limited English Proficient ("LEP") receive quality legal services in their preferred language. Our practice uses bilingual advocates and support staff who are proficient in the client's language through the hiring of bilingual staff. The assigned paralegal is bi-lingual (English/Spanish), and Hmong-speaking staff is also available, as needed.

d.3. Briefly describe the language capabilities among program staff.

Recruitment and hiring practices take into consideration a second language proficiency for positions having direct contact with diverse client populations. CCLS looks for diversity, including ethnicity and language capability. The program is proud of its staff members, who reflect the community served. Our staff members have the ability to communicate with clients in various languages, including Spanish, Khmer, Lao, Thai, Tagalog, Punjabi, and Hmong.

In addition, telephone interpretation services are available for languages not spoken by the staff. Program advocates are authorized to procure language access services up to a cost of \$250 per use, which is approximately one hour of language services, without the need for pre-approval from supervisory or administrative staff.



e. Coordination Efforts

Describe the current and planned coordination and collaboration on this project with other legal services providers, or other community organizations. (250 word limit)

Community partnerships are key to CCLS' effectiveness in serving target populations. Partners help identify individuals needing the project services and often assist in eliminating any barriers litigants may encounter, such as transportation issues, providing office space, etc. Project staff works to inform these programs of the guardianship services so they may directly refer their clients to the project. For example, Comprehensive Youth Services (CYS) is a family counseling service center working in area schools and operates multiple family resource centers in the rural communities. CYS staff regularly refers individuals in need of guardianship assistance.

Additional referrals come from DSS Child Protective Services staff, and Centro La Familia Advocacy Services serves families who may have minors entering the foster care system; they also operate family resource centers in remote rural communities. The Marjaree Mason Center refers families to the project; they assist domestic violence survivors with a full range of support services, including emergency shelter and counseling.

Staff from the County Law Library are key partners, participating in the clinics, partner meetings and making their computers and meeting rooms available to self-represented litigants. The third largest school district in the state, the Fresno Unified School District, has also referred families for guardianship services.

f. Proposed Services

f.1. Individual Services

f.1.a. Total number of individuals to be served (do not include family members and others impacted):

65

f.1.b. Select the applicable services that will be provided (select all that apply)

- | | |
|---|---|
| <input checked="" type="checkbox"/> Information on Legal Options | <input checked="" type="checkbox"/> Information on Court Procedures and Hearing |
| <input checked="" type="checkbox"/> Document Preparation and Review | <input checked="" type="checkbox"/> Filing or Services Assistance |
| <input type="checkbox"/> Supervised Settlement Services | <input checked="" type="checkbox"/> Post-Hearing Assistance |
| <input type="checkbox"/> Other | |



f.1.c. Format/Description:

Project staff members continue to provide litigants with one-on-one assistance via telephone, email, or computer, if they have access. Those participants with smartphones may scan their petitions and send them via email or text, with staff members contacting them to clarify any information needed to complete the process. In addition, litigants may drop off their information at the CCLS offices or request an appointment.

Prior to the start of individual or clinic services, litigants are required to provide information regarding income sources and amounts. A form is used to determine their eligibility for the project's services. Project staff members are trained on eligibility factors for this grant. Litigants must also sign a project disclosure form which clarifies the nature of the services, that is, no attorney-client relationship is established, there is no client confidentiality and the project will serve both sides and the Court remains neutral. The disclosure form is attached to the MOU.

For those eligible for the one-on-one sessions, the project paralegal will prepare all of the Court documents and will prepare declarations needed for the guardianship petition. She reviews the process and the timeline for obtaining a guardianship. The paralegal will also e-file the documents for the litigants.

Project staff assist with completion of documents, filing, and service to ensure litigants obtain their final orders. Staff members track the progress of the petition, and the petitioner is contacted with any concerns. Every Court filing is carefully reviewed prior to closing to ensure petitioners receive copies of all final documents.

The project assists with serving the petition documents on the required family members, the one area where the lack of information causes delays for both the Court and the petitioner if not completed correctly. This can be very confusing for self-help litigants as many are not aware of where or how to locate the individuals required to be notified of the petition. The staff assists with the task of locating and serving the family members that need to be served. If the location of the family members is known, project staff prepares the documents for service with the Sheriff's Office or suggest the litigant hire a process server to serve the documents.

If those family members cannot be located and served, a Declaration for Due Diligence must be prepared and filed with the Court, demonstrating what actions were taken to locate that particular family member that must be served. The project paralegal will assist with this process as well.

After the hearing, staff sends each litigant a letter to remind them they will receive copies of the Court's orders in the mail, how to obtain extra copies, and who should receive the order (school, doctors, etc.).



This letter includes the survey with a self-addressed envelope to facilitate its return to CCLS.

f.2. Workshops

f.2.a. Total number of workshops planned:

0

f.2.b. Total number of individuals expected to attend workshops (do not double count those served through individual services or self-help clinics):

0

f.2.c. Select the applicable services that will be provided:

- | | |
|--|--|
| <input type="checkbox"/> Information on Legal Options | <input type="checkbox"/> Information on Court Procedures and Hearing |
| <input type="checkbox"/> Document Preparation and Review | <input type="checkbox"/> Filing or Services Assistance |
| <input type="checkbox"/> Supervised Settlement Services | <input type="checkbox"/> Post-Hearing Assistance |
| <input type="checkbox"/> Other | |

f.2.d. Format/Description:

No workshops are planned.

f.3. Self-Help Clinics

f.3.a. Total Number of Clinics Planned:

22

f.3.b. Number of individuals to be served at clinics (do not double count with individual services or workshops):

220

f.3.c. Select the applicable services that will be provided:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Information on Legal Options | <input checked="" type="checkbox"/> Information on Court Procedures and Hearing |
| <input checked="" type="checkbox"/> Document Preparation and Review | <input checked="" type="checkbox"/> Filing or Services Assistance |
| <input type="checkbox"/> Supervised Settlement Services | <input checked="" type="checkbox"/> Post-Hearing Assistance |
| <input type="checkbox"/> Other | |



f.3.d. Format/Description:

The clinic sessions are designed to explain the process and the full range of services petitioners (and opponents) can receive. To ensure eligibility for services, staff members review the disclosure form, basic income eligibility, and the available resources. Litigants must pre-register for the clinic and provide income information, listing all sources. They must sign the disclosure form acknowledging they are aware of the project's limitations and that staff or pro bono volunteers are not their attorneys.

The clinic begins with Probate staff providing the PowerPoint presenting with an overview of services; hours of operation, location, filing of the petition and the resources available at the Court's website. Staff from the Fresno County Law Library explain the guardianship process, general information, Know Your Rights and materials available at their website and in their office. Project staff reviews the Judicial Council forms which are displayed and explained so litigants gain an understanding of the information required to complete the packet. The presentations are supported with printed materials followed by a question-and-answer period. Participants are encouraged to watch the video produced by the Contra Costa Superior Court for self-help litigants, available at the Fresno County Law Library's website; a flyer is distributed at the clinic which provides a link to this presentation.

Litigants may also access the forms and additional information at the Court's website, the Fresno County Law Library, and with the CCLS project staff members. As litigants call CCLS for services, the paralegal sends the forms via email or through regular mail if needed. The project does not provide for online document assembly.

The goal is for litigants to obtain the guardianship of minor children in their care by gaining an understanding of the process and the help they will receive throughout the project. Litigants who are income eligible can receive individual services provided by project staff members. The project is enthusiastically supported by the partners who are also available to assist those who do not qualify for the project's services.

**f.4. Total number of 285
individuals to be served
(auto-calculated):**



g. Project Goals

Briefly describe the goal(s) for this project.

The overall goal of the project is for self-represented litigants to gain an understanding of the process, receive assistance with the forms, and successfully obtain the guardianship for the minor children in their care. This is accomplished through the individual assistance provided to those with difficulty in accessing and forms completion, language barriers, and computer literacy. With the reinstatement of clinics via Zoom, many more individuals will benefit from the project. The end result is that children will prosper in a loving home, enhancing their future success.

h. Outreach & Community Engagement

h.1. Outreach

Describe how you will communicate the availability of services to litigants and the community. (250 word limit)

Staff distributes informational flyers promoting the virtual clinics services throughout the community and posts the information at the CCLS website. Information on services is also posted to CCLS Facebook page and through digital newsletters sent to over 800 individuals.

The support from Fresno County Law Library and the Court is important in directing petitioners and opponents. Fresno County residents who contact the CCLS Legal Advice Line (LAL), are referred to the guardianship project. Other referrals come from law enforcement, Child Protective Services (CPS), Fresno Unified School District, Fresno County Juvenile Court, Fresno County Victims' Services, Central Valley Regional Center (CVRC), foster family agencies, and foster parents' support groups.

Other CCLS staff members 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.



h.2. Outreach Resources

Identify any new resource materials to be developed, who will be responsible for preparing those materials, and how they differ from materials already posted, i.e., at www.courts.ca.gov. (250 word limit)

Self-help materials are available from referenced the reference online resources and others including those available at the Court's website. The Fresno County Law Library maintains an informational sheet that outlines the guardianship process, referencing all the documents that must be filed and listing available legal resources, including information from the California Courts website (www.courts.ca.gov).

A flyer developed jointly with Court staff members is distributed at various locations, targeting those who may need guardianship assistance. The project will continue to use these materials and does not anticipate the development of any new materials at this time. If a need is identified by the partners or new information becomes available, the materials will be updated. The partners will determine who will be responsible for the updates and review before final distribution of the materials.

Project staff will work with CCLS' Information Technology Department to place the project's materials, such as the guidance sheet, on the CCLS website, with appropriate links to the Probate Division and other Court resources.

3. Administration

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.

a. Grant Year Timetable

For existing and new projects, describe the proposed timetable for the implementation or continued administration of the project by quarter for the grant year. Indicate if any significant changes to existing operations are anticipated. (250 word limit)



Q1 (January-March): Review/adjust assigned project staff members as needed; clarify and review project goals with staff, partners and volunteers; clinic design, if necessary; research/update clinic informational materials; determine new data points to track and measure effectiveness; refine litigant customer satisfaction survey; review and distribute outreach materials; conduct first quarterly partner meeting and set the schedule for the year; carry out clinic sessions or as previously modified in discussions with the Court.

Q2 (April-June): Continue project activities; review, evaluate, and modify informational materials, if needed; distribute outreach materials; update website materials; review litigant participation; conduct survey of clinic participants; seek feedback from the Court; prepare agenda and conduct second quarterly partner meeting; report on litigant comments; adjust project design in cooperation with the Court, if necessary.

Q3 (July-September): Continue project services; conduct first six-month review of project and report to management and the Court; review and distribute outreach materials; review client feedback and modify survey if necessary; carry out third quarterly partner meeting; identify needed changes with the Court; seek feedback from Court staff, judges, and partners.

Q4 (October-December): Continue project services; review, evaluate and modify presentation materials for clinic sessions, if necessary; distribute outreach materials; conduct survey of clinic participants; conduct fourth quarterly partner meeting; evaluate impact of project services; report to management and the partners.

b. Staffing



b.1. Identify key personnel involved in staffing and supervising this project.

The budget continues to provide for increased attorney supervision and oversight. This project is placed with the Family Law/Immigration Team led by the team's Supervising Attorney, Ms. Jenee Barnes. She provides guidance and supervision of staff, ensures high quality services are delivered, and monitors the activities from intake to closing. An attorney for eight years, Ms. Barnes has extensive courtroom experience in the areas of family and immigration law. She has mentored entry-level attorneys, legal assistants, and law students.

Ms. Connie Medina-Flores continues to provide services to self-help litigants. She is an experienced paralegal with over 30 years' experience. Her background with CCLS covers a wide range of subject matter expertise, including housing, immigration, public benefits, and healthcare, which helps in directing litigants to other needed services within CCLS. Connie speaks Spanish fluently, and other staff members are available to meet with those speaking Hmong or Cambodian.

A second paralegal familiar with guardianships is also assigned to assist with one-on-one client interviews and to follow up, as needed. The project is also supported by a legal secretary (.3FTE) who assists project staff.

Advocates are assigned to substantive law teams where they receive work assignments and participate in weekly reviews to discuss challenging cases, receive training, and report on their progress. The Supervising Attorney and the project paralegal meet weekly for one-on-one project review. Ongoing work is monitored through electronic reports that display advocates' time, legal issues, and work performed. Any urgent matters are immediately addressed with the Supervising Attorney.

b.2. Will supervision be provided on-site?

☒ Yes

☐ No



b.2.a. If yes, describe the steps that will be taken to ensure quality control.: Yes. The assigned paralegal works under the direct supervision of her Supervising Attorney in carrying out the project services. They meet weekly, more often if needed, to discuss matters related to the delivery of services to self-help litigants. They remain in constant communication (emails, texts, phone) with those who receive the individual assistance and others who have questions about their guardianship, including those who proceed on their own, if requested.

Supervising attorney is overseeing the development of the PowerPoint presentation used for the workshop. She will also participate in the mock sessions of the workshop to make sure all information is presented accurately.

Pro bono attorneys will be present during the live Q & A session of the workshop to answer questions. The supervising attorney will also be on-call during the workshops to handle any issues that arise.

c. Supervision of Volunteers

c.1. Will volunteers be utilized for this project?

☒ Yes

☐ No



c.1.a. If yes, please describe their anticipated role.: Through its Pro Bono Program (PBP), CCLS is committed to using pro bono attorneys as a significant component in service delivery to clients. Pro bono attorneys provide mentorship to CCLS attorneys, assisting junior attorneys with litigation and strategy skills building. In addition, volunteer attorneys may assist in our clinics and in providing legal educational materials on guardianship process and "Know Your Rights" information. The project plans to utilize pro bono attorneys to assist with the question and answer section of the clinics via Zoom.

The pandemic impacted our PBP, as with most other legal aid programs. According to a recent Stanford School Study on the impact of the pandemic among legal aid programs in California, over 66 percent of the respondents experienced a decrease in the use of volunteers. The report noted that law schools and firms struggled with their own challenges, including higher staff turnover. Many stayed away from longer term projects.

In light of COVID, we are restructuring our PBP to improve the program and reengage with our volunteer attorneys. The PBP employs three staff members to carry out activities associated with the recruitment, placement, and retention of attorneys, paralegals, law students, and other volunteers. They screen potential volunteers from San Joaquin College of Law and paralegal students from Fresno City College for placement within the program.

Year-round volunteer attorney recruitment efforts occur in collaboration with the Fresno County Bar Association, their Pro Bono Services Section, and other local bar affiliations such as La Raza Lawyers, Central California Pacific American Bar, Fresno County Women Lawyers, and the newly formed Unity Bar. Staff reaches out to law firms and sole practitioners through various meetings and speaking engagements to the private bar, service clubs, and peer recruitment.

c.2. Briefly describe how volunteers will be trained and supervised.: Pro bono volunteers, interns and other volunteers will be supervised and trained by the PBP Supervising Attorney whose duties include the recruitment and training of volunteers, in consultation with project staff.



d. Sub-Grants

Provide details for any sub-grant(s), including plans for oversight and evaluation of the services provided by the sub-grantee. (250 word limit)

The project does not anticipate entering into any sub-grant agreements.

e. Pro Se Document Review

How will the project ensure that documents are completed correctly? Who will conduct the review and when? (250 word limit)

To ensure forms are completed accurately, those eligible for services send their completed forms via regular mail, email, or text to the paralegal or to the team secretary who will print them out for initial review by staff members and the Supervising Attorney. In addition, for those who attended the clinics, the Court's Probate Examiner also reviews prior to filing.

f. Eligibility for Services

f.1. Identify all criteria Each self-represented litigant is required to complete the eligibility screening **and guidelines used to** form used to determine income eligibility (200 percent FPL) for the project's **establish eligibility for** services. Litigants must list all sources of monthly income for each **services and how the** household member. Everyone who qualifies for services is also eligible to **project screens for** obtain a fee waiver, which is signed under penalty of perjury. Additionally, **eligibility for services.** each matter is reviewed for subject matter eligibility, and only those whose **(250 word limit):** income and subject matter fall within the project's scope can receive assistance from the staff members. Eligibility also includes acknowledgement of the limitation of the services provided by signing the disclosure statement.

f.2. Will this project serve ☐ Yes
non-indigent persons?: ☒ No



f.3. Identify any resources or referrals to be provided to litigants who are not eligible for this project's services. Those determined not eligible for the project's services are referred to the Fresno County Law Library, the Court's Probate Division staff, and the Fresno County Bar Association's Attorney Referral Service. They are provided information regarding the available online resources including the Court's website.

(250 word limit):

The Probate Examiners are available to assist those have who attended the clinics 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.

The reasons for those determined to be ineligible are due to their need for assistance in an area of substantive law that is beyond the scope of the project or the minor in their care is under the jurisdiction of the Juvenile Court.

g. Attorney-Client Relationship

g.1. Will this project establish an attorney-client relationship?: No



g.1.b. If no, explain how self-represented litigants will be made aware of the scope of service to be provided and that no attorney-client relationship will be established (250 word limit): The project services are available to both sides, those seeking the guardianship and those opposing the petition. Each self-represented litigant must sign a disclosure form which clearly explains the partners are not their lawyers, and may serve both sides. It further states that no attorney-client relationship is established. The disclosure informs the litigant the project services are offered by CCLS, an independent non-profit legal services provider. It also states the Court remains neutral at all times and the project is not operated by the Court.

This response will be included in the Letter of Support template on Form F of this application.

h. Impartiality of the Court

h.1. Impartiality of the No Court:

Will this project serve only one party or side of a matter?

4. Continuity Planning

A successful proposal will address whether its proposed services can continue with funds other than those provided by Partnership Grants and provide details of past efforts and future plans to secure such alternate funding.

Refer to RFP requirements regarding funding priorities.



a. Describe plans to obtain funding that will sustain this project's services beyond the typical Partnership Grant funding cycle. (250 word limit)

It has been a challenge to identify and secure additional funds to sustain the project's ongoing services. We anticipated an infusion of funds at the local level for increased use of guardianship placements of minors, in light of the controversy identified last year with the illegal placement of foster children by DSS workers. Unfortunately, that did not occur, however, leadership changes did take place to improve their foster care services. Over the years, CCLS has utilized core funding to fill gaps, as needed. Our costs continue to go up each year, however the grant does not cover increases in staff, health benefits, and other associated costs in the delivery of services. This program year, the project did receive an increase in grant funds from the EAF Partnership program, which is greatly appreciated.

b. List all funding sources that have been explored or pursued for this Partnership Grant project in the last twelve months.

Specifically identify applications submitted, amounts requested, revenue raised for project operations, and any funds that were obtained by leveraging the Partnership Grant. This section may also be used to explain any barriers to pursuing funds. (250 word limit)

Recently, as a result of American Rescue Plan Act (ARPA) there are substantial funds, in particular for senior programs through the Area Agencies of Aging. CCLS is eligible for a portion of these additional funds from the local Fresno-Madera Area on Aging (FMAAA). We are in the process of completing their program and budget documents, anticipating funds to be available within the next two months, as we wait for their formal approval. In our efforts to solidify the receipt of these funds, project staff and program leadership conducted an analysis of data on the project's services provided to those 60 years and older. The data indicates approximately 20 percent of clients served fall within this age group. Not surprisingly as many who seek our services are grandparents, aunts, and others who have longstanding relationships with the children in their care. We anticipate the funds will be available to CCLS for an extended period of time, however, we remain cautiously optimistic and have identified a portion of ARPA funds for the project next year.



c. Other Efforts

Describe any other efforts to support continuity planning, such as recruitment of volunteers or pursuing in-kind support (250 word limit)

We anticipate the ARPA funds will be available in this current program year (2023) allowing CCLS to designate a portion of those fund in the 23-24 FMAAA contract year as well. CCLS believes that by emphasizing outreach to the senior population we can maximize serving more grandparents and others, 60 years and older which places the project in a position to fully utilized the increased funds from the FMAAA.

As noted, CCLS is restructuring our Pro Bono Program to reengage our attorney volunteers. Volunteers can participate in the Question-and-Answer portion of our clinics and assist individuals with their paperwork. As we restructure, we will be assessing the various ways in which pro bono attorneys can serve not only this program, but in other areas as well. At a minimum, they can help extend services to more individuals through their ongoing support and participation.

5. 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.

Projects must submit detailed reporting and evaluation materials after each grant year. These will include an expenditures report, information on the demographics of clinic customers, findings from client satisfaction surveys, a report on meetings with court partners, and at least one additional evaluation modality.

a. Project Services



1. Upload a copy of your most recent Partnership Grant Evaluation

21_Guardianship_Report_submitted.pdf
150.5 KB - 03/16/2023 4:27PM

Total Files: 1

2. For existing projects, provide a brief summary of services provided in the current year with any relevant highlights, benchmarks, challenges, etc. What changes have been made to the project over the past year, and what changes are anticipated in the upcoming grant year?

In spite of the delays and chaos that COVID brought about, this year the project continues to see an increase in the individual one-on-one sessions as staff worked to streamline the process. We also added a portion of a second paralegal to support the individual services. As a result, we are assisting more individuals than before with this change.

The relationships between the partners has improved tremendously, there is more communication among the various partners. Quarterly meetings have returned via Zoom and are making progress with resuming the clinics in a short period of time. Changes include incorporating the Court's feedback, going digital with the clinics with the challenge of having litigants adjust to this new format. We are keeping open the possibility of conducting a clinic in the CCLS offices, as we anticipate many seniors will experience language and computer barriers. Regardless of the platform, a major challenge endemic to low-income communities is lack of access to internet-based services for litigants as many of the rural communities lack reliable internet infrastructure and the cost of broadband services is an additional barrier.

b. Satisfaction Surveys



1. Upload a copy of the Satisfaction Survey now in use, or a proposed survey to be implemented in the coming grant year

CCLS_Project_Survey_for_COURT_PERSONNEL.pdf

130.5 KB - 03/16/2023 4:37PM

Guardianship_Sastisfactio_Survey.pdf

51.1 KB - 03/15/2023 5:27PM

Total Files: 2

2. Describe how the survey will be distributed, and how data will be gathered and analyzed. (250 word limit)

After each clinic, a satisfaction survey sent out by the project staff to gather feedback from clinic participants asking them to assist in identifying the project's successes and areas for improvement.

At the conclusion of the individual services, a more comprehensive client satisfaction survey is mailed to all litigants who received the one-on-one assistance to provide their feedback as well. Once services are completed, the project paralegal sends the litigants copies of their guardianship orders, along with surveys, requesting that the petitioners fill out and return them. To facilitate this, she provides a self-addressed, stamped envelope for the litigants to return the completed survey. For the most part, she does receive the completed surveys, with the vast majority of those served indicating their satisfaction with the assistance provided by project staff.

c. Identify at least one additional evaluation methodology to be used in assessing the impact or efficacy of this project's services. (250 word limit)

Last year, during the quarterly meetings, the partners discussed how best to gather feedback directly from court staff and the judge regarding the project's services. Utilizing a survey borrowed from the Judicial Council's presentation on evaluation, there is agreement on the format. A copy is attached. The survey will be completed twice each year, initially seeking feedback from court staff followed later by having the judge provide feedback. The survey will be administered online using survey monkey or a similar format that allows for responses to be tabulated and analyzed.

Form C - Project Budget



Program Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
1. Lawyers	\$2,715	\$0	\$2,715	\$5,430
2. Paralegals	\$40,215	\$0	\$40,215	\$80,430
3. Other Staff	\$7,755	\$0	\$7,755	\$15,510
4. SUBTOTAL	\$50,685	\$0	\$50,685	\$101,370
5. Employee Benefits	\$16,815	\$0	\$23,401	\$40,216
6. TOTAL PROGRAM PERSONNEL	\$67,500	\$0	\$74,086	\$141,586

Program Non-Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
7. Space	\$0	\$0	\$3,754	\$3,754
8. Equipment Rental and Maintenance	\$0	\$0	\$309	\$309
9. Office Supplies	\$0	\$0	\$1,131	\$1,131
10. Printing and Postage	\$0	\$0	\$0	\$0
11. Telecommunications	\$0	\$0	\$955	\$955
12. Technology	\$0	\$0	\$0	\$0
13. Program Travel	\$0	\$0	\$413	\$413
14. Training	\$0	\$0	\$0	\$0
15. Library	\$0	\$0	\$0	\$0
16. Insurance	\$0	\$0	\$371	\$371
17. Evaluation	\$0	\$0	\$0	\$0
18. Contract Service to Clients	\$0	\$0	\$0	\$0
19. Other	\$0	\$0	\$0	\$0
20. TOTAL PROGRAM NON-PERSONNEL	\$0	\$0	\$6,933	\$6,933
TOTAL PROGRAM	\$67,500	\$0	\$81,019	\$148,519

Administrative and Overhead



21. Admin Personnel	\$16,875	\$0	\$0	\$16,875
22. Admin Non-Personnel	\$5,625	\$0	\$0	\$5,625
TOTAL ADMINISTRATIVE	\$22,500	\$0	\$0	\$22,500
TOTAL AMOUNT OF FUNDS	\$90,000	\$0	\$81,019	\$171,019

1. Lawyers

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Supervising Attorney	0.03	0.00	0.03	0.06
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
TOTAL LAWYERS	0.03	0.00	0.03	0.06

2. Paralegals

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Paralegal	0.75	0.00	0.75	1.50
	0.00	0.00	0.00	0.00
TOTAL PARALEGALS	0.75	0.00	0.75	1.50

3. Other Staff

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Legal Secretary	0.15	0.00	0.15	0.30
	0.00	0.00	0.00	0.00
TOTAL OTHER STAFF	0.15	0.00	0.15	0.30
TOTAL PERSONNEL (in FTEs)	0.93	0.00	0.93	1.86

Form D - Budget Narrative

Personnel



Account Title	Proposed Partnership Grant	Narrative
1. Lawyers	2715	.03 FTE Supervising Attorney charged to Grant, .03 FTE charged to Other funds.
2. Paralegals	40215	.75 FTE of Paralegal assigned to work under the project services.
3. Other Staff	7755	
4. SUBTOTAL	50685	
5. Employee Benefits	16815	Benefits and payroll taxes paid on behalf of employees working under the program.
6. TOTAL PROGRAM PERSONNEL	67500	

Non-Personnel

Account Title	Proposed Partnership Grant	Narrative
7. Space	0	
8. Equipment Rental and Maintenance	0	
9. Office Supplies	0	
10. Printing and Postage	0	
11. Telecommunications	0	
12. Technology	0	
13. Program Travel	0	
14. Training	0	
15. Library	0	
16. Insurance	0	
17. Evaluation	0	
18. Contract Service to Clients	0	
19. Other	0	
20. TOTAL PROGRAM NON-PERSONNEL	0	

Administrative

21. Admin Personnel	16875	Includes Fiscal, IT and administrative staff working on administration of the project.
22. Admin Non-Personnel	5625	Allocated share of organizational payroll administration, accounting, audit, and IT services.
TOTAL ADMINISTRATIVE	22500	



TOTAL AMOUNT OF FUNDS

90000

Form E - Project Assurances

Download the Assurances document and upload a signed copy below.

Upload PDF Version of
Signed Assurances
Document:

2024_CCLS_29_Project_Assurances.pdf
95 KB - 03/15/2023 3:09PM

Total Files: 1

Form F - Agreement of the Partner Court

Any uploaded Letter(s) of Support and MOU are listed below and also attached at the end of this pdf.

1. Upload Letter(s) of
Support:

2024_CCLS_Guardianship_Letter_-SIGNED.pdf
162.2 KB - 03/16/2023 4:39PM

Total Files: 1

2. Upload MOU(s):

Refer to application
instructions for MOU
requirements.

Staff Review



Project Budget: No Revision Required



Central California Legal Services - -
03/16/2023

Grant Type: Partnership Grants

Type: Evaluation – Partnership

Status: Draft

Evaluation Year: 2022

Partnership Grant Guardianship Project
Project:

Partnership Grant \$41,000
Award Amount:

Form A - Expenditures

Account Title	Approved Budget	Expenses through 12/31	Unspent Funds
1. Lawyers	\$0	\$0	\$0
2. Paralegals	\$19,757	\$19,757	\$0
3. Other Staff	\$0	\$0	\$0
4. SUBTOTAL	\$19,757	\$19,757	\$0
5. Employee Benefits	\$11,908	\$11,908	\$0
6. TOTAL PERSONNEL	\$31,665	\$31,665	\$0
Account Title	Approved Budget	Expenses through 12/31	Unspent Funds
7. Space	\$0	\$0	\$0
8. Equipment Rental and Maintenance	\$172	\$172	\$0
9. Office Supplies	\$497	\$497	\$0
10. Printing and Postage	\$0	\$0	\$0
11. Telecommunications	\$130	\$130	\$0
12. Technology	\$0	\$0	\$0
13. Program Travel	\$0	\$0	\$0
14. Training	\$0	\$0	\$0
15. Library	\$205	\$205	\$0
16. Insurance	\$131	\$131	\$0
17. Evaluation	\$0	\$0	\$0

18. Contract Service to Clients	\$0	\$0	\$0
19. Other	\$0	\$0	\$0
20. TOTAL NON-PERSONNEL	\$1,135	\$1,135	\$0
ADMINISTRATIVE AND OVERHEAD			
21. Admin Personnel	\$0	\$0	\$0
22. Admin Non-Personnel	\$0	\$0	\$0
TOTAL ADMINISTRATIVE	\$0	\$0	\$0
TOTAL AMOUNT OF FUNDS	\$32,800	\$32,800	\$0

1.a. Provide an explanation for any discrepancies from your approved budget:

This includes whether you have any unspent funds or if any of the line items in the "Expenses through 12/31" column deviate from your "Approved Budget" column.

Note: The deadline to submit budget revisions and/or carryover requests is January 31, 2023. All requests will be reviewed by the Legal Services Trust Fund Commission on March 24, 2023.

As a reminder, the 2022 and PG 2.0 Supplemental Partnership Grants period ended on December 31, 2022. Any unspent funds without an approved carryover must be returned to the State Bar.

No carryover requests will be considered for new PG 2.0 projects until the end of that grant period, which is December 31, 2023.

Form B - Activities

1. Identify the focus area(s) of the project:

Select all that apply.

Guardianship

2. Demographics

2.a. Did the project seek to serve a particular demographic group? If so, identify the group(s):

Select all that apply.

Children & Youth, Limited English Proficiency, Rural, Seniors

2.b. Other than English, in what language(s) were services offered?

Select all that apply.

Spanish

2.b.2. How are language services offered?

Select all that apply.

- | | |
|--|--|
| <input checked="" type="checkbox"/> Bilingual staff/volunteers (Spanish) | <input type="checkbox"/> Bilingual staff/volunteers (languages other than Spanish) |
| <input type="checkbox"/> Multilingual staff/volunteers (if not included above) | <input checked="" type="checkbox"/> Interpreters |
| <input checked="" type="checkbox"/> Translation Service | <input type="checkbox"/> Other |
| <input type="checkbox"/> N/A | |

Please indicate the number of bilingual (Spanish) staff/volunteers, position(s), FTE(s) and if funded by Partnership Grant funds.

The project funds one bilingual (Spanish) staff paralegal 0.7% FTE funded by Partnership Grant funds.

Please describe which language(s) are most often used for the Partnership Grant project for interpretation services.

The language most often used for project interpretation services is Spanish.

Please describe which language(s) are most often used for the Partnership Grant project for translation services.

The language most often used for project translation services is Spanish.

2.c. Was there a need for services in additional languages beyond those that the project was able to provide? If so, which ones?

No. The project served 8 monolingual Spanish speakers. No other non-English speakers sought project services.

3. Litigant Assistance

Include any assistance provided through this project to help litigants represent themselves in court, whether in individual or group settings.

For reporting purposes, actual services will be calculated by a pro rata percentage of Partnership Grant expenses of total project expenses as of the reporting period.

Partnership Grant Pro Rata Calculation (Part 1)

Goals and Actuals (Part 2)

3.a. Goals and Actuals

Click the “Open” button to report on goals and actuals. In the “Goal” column, enter the goal numbers for the full grant period (12 months or 21 months). In the “Actual” column, enter the actual services provided for the reporting period. For reporting purposes, the “Pro Rata” column will automatically calculate based on the numbers entered in the “Actual” column. Grantees who received PG 2.0 supplemental funding should combine deliverables for their 2022 Partnership Grant and PG 2.0 grant.

Goals and Actuals

	Goal (Full grant period)	Actual (Reporting period)	Pro Rata (Reporting period)
Total Number of Workshops provided	22	0	NaN
Total Number of Individuals served	0	0	NaN
Total Number of Individuals who received one-on-one services (not including family members and others impacted)	58	103	NaN

3.b. Were all goals met?: ☐ Yes
☒ No

1. Goal for total number of workshops provided annually: 22

Actual total number of workshops provided annually:

2. Goal for total number of individuals served through workshops annually:

Actual total number of individuals served through workshops annually:

3. Goal for total number of individuals who received one-on-one services annually (Not including family members and others impacted): 58

Actual total number of individuals who received one-on-one services annually:

3.c. If goals were not met, explain why: In 2022 the Court remained closed to in-person guardianship hearings and project workshops due to Covid-19. Significant efforts were made to launch a virtual version of the workshop in collaboration with the Court, volunteers, and an external technology consultant; however, virtual workshops did not begin in 2022. Project resources were re-directed to expand remote one-on-one services, evidenced by nearly doubling the projected number served.

Services Provided

Explain "Other": Not Applicable.

4. Referrals

4. Referrals

Only report one referral per individual in the first appropriate category on the list. For example, if someone was referred to another legal services provider and to a social service agency, indicate the referral on the "Other Provider" line.

Referred To	Number of Individuals Referred
Another legal aid provider	0
Court-based provider of legal information, such as the Self-Help Center	18
Private Bar (LRS of individual private lawyers not affiliated with program)	4
Provider of human or social services (non-legal)	1
Other source of assistance, none of the above	8
Total Number of Individuals Referred	31

4.b. Why were individuals referred for service elsewhere?

Select all that apply.

Individual was ineligible for services, Individual needed extensive services beyond the scope of the project

5. Resource Materials

5.a. Upload materials developed or substantially revised for this project during the reporting period.

Include informational or substantive materials for litigants, administrative materials for staff who are assisting on this project, and evaluation or survey materials for use by either litigants or staff.

5.b. Briefly describe each resource material.

Indicate if materials are newly developed or revised, and how many of each were distributed.

The project did not develop new, or substantially revise existing, materials during the reporting period.

6. COVID-19

6.a. How were Partnership Grant project goals and deliverables impacted by COVID-19?

Select all that apply.

- | | |
|---|---|
| <input type="checkbox"/> Court/Agency backlog impacting time to obtain outcomes for clients | <input type="checkbox"/> Decrease in case volume |
| <input type="checkbox"/> Decrease in call volume | <input checked="" type="checkbox"/> Decrease in # of workshops |
| <input checked="" type="checkbox"/> Decrease in # of clinics | <input checked="" type="checkbox"/> Decrease in # of in-person events |
| <input type="checkbox"/> Decrease in pro bono attorney availability | <input type="checkbox"/> Increase time spent on cases/client hours |
| <input type="checkbox"/> Limited client access to technology | <input type="checkbox"/> Offered services in a new substantive area |
| <input checked="" type="checkbox"/> Staffing issues | <input type="checkbox"/> Difficulty recruiting volunteers |
| <input type="checkbox"/> No impact | <input checked="" type="checkbox"/> Other |

Explain "Other": Court remained closed to in-person guardianship hearings and project workshops due to Covid-19.

Form C - Evaluation

1. How was litigant feedback obtained as part of project evaluation? (Check all that apply)

Select all that apply.

- | | | |
|--|--|---|
| <input type="checkbox"/> Case Outcomes | <input type="checkbox"/> Client Database | <input type="checkbox"/> Email Inquiries |
| <input type="checkbox"/> Focus Groups | <input type="checkbox"/> Interviews (Phone) | <input type="checkbox"/> Interviews (Feedback) |
| <input type="checkbox"/> Informal Feedback | <input checked="" type="checkbox"/> Surveys (Mail) | <input type="checkbox"/> Surveys (Phone) |
| <input type="checkbox"/> Surveys (In-Person) | <input type="checkbox"/> Surveys (Electronic) | <input type="checkbox"/> Meetings (Taskforce/Coalition) |
| <input checked="" type="checkbox"/> Meetings (Court) | <input type="checkbox"/> Volunteer Feedback | <input type="checkbox"/> Other |

2. Identify any changes that have been made to the project from the description provided in the approved grant proposal. Describe changes to key project personnel or staff roles, why they were necessary, and the impact of those changes.

The project experienced and increase in the demand for guardianship services, serving nearly double the goal for one-on-one services. Even with supplemental funding, the budgeted project paralegal (.7 FTE) was insufficient to meet the demand for project services. An additional staff paralegal was added to the project, paid for in part with other funding. The project's planned virtual workshops did not launch in 2022. Although significant progress was made developing the virtual workshops, there were unanticipated delays including developing the online platform. The virtual workshops are expected to begin in 2023.

3. Did project evaluation indicate whether litigants who received services through the project were better able to pursue or conclude their litigation successfully and efficiently, compared to those who did not receive such services? If so, explain.

Yes. The satisfaction survey responses consistently showed the highest levels of satisfaction by litigants using guardianship services. There was no negative feedback.

4. Satisfaction Surveys

4.a. Upload a copy of the satisfaction survey used during the reporting period.

Blank_Survey.pdf
51.1 KB - 03/14/2023 5:45PM

Total Files: 1

4.b. How many satisfaction surveys were sent to litigants?

42

4.c. How many satisfaction surveys were received from litigants?

14

4.d. What did the responses reveal about the overall satisfaction of litigants?

The project received 14 responses to the satisfaction survey. On all survey "general satisfaction" questions (1 through 8), all 14 litigants responded to all questions with "Definitely." The questions included:

Question: "Overall, did you find the services helpful?"

Question: "If you went to a hearing on this matter, do you feel that the help/guidance you received from staff helped you present your case to the judge?"

Question: "After attending the workshop, do you feel you were able to complete your forms and present your case to the judge?"

Narrative feedback from project litigants includes:

"I would not have been able to do this without the help of Connie and Jessica. They were both so approachable and made this experience less stressful. Thank you for this service."

"CCLS did a great job!!"

"I would have not known where to begin or even get the right paperwork prepared or filed. I am forever grateful for Connie and her assistant Jessica they were Awesome! Thank you!"

5. Court Partnership

5.a. Explain how project and court staff coordinated services. Describe any operational changes made as a result of that coordination and any anecdotal information or feedback received.

The court probate clerk referred individuals needing guardianship assistance directly to the CCLS paralegal assigned to this project. CCLS then provided project guardianship services on a one-on-one basis remotely by telephone. Additional project referrals were made by the Fresno County Law Library. The project partners communicated by email and telephone on an as-needed basis regarding telephone referrals and remote services.

5.b. Briefly describe the court partner meetings. How many meetings were held, who attended them, what topics were generally discussed, and are there any pending issues yet to be resolved?

The project partner meetings were scheduled quarterly, although only 2 were held during the reporting period (8/11/2022 and 11/20/2022); all conducted via Zoom. Those in attendance included CCLS and Court staff, the Fresno Law Library, Child Protective Services, and Cultural Brokers (CPS funded guardianship services to African-American families).

The meetings were coordinated by the CCLS paralegal and included a written agenda. Project partners contributed to developing the meeting agenda for discussion on topics relevant to the project. These discussion items included court staffing and hours, status of the virtual clinic, organizational operations of partners, resources available to litigants (e.g., library computers), and new court forms.

6. Additional Evaluation Method

6.a. Describe the additional evaluation method that was implemented for this project (e.g. courtroom observations, focus groups, court/case file reviews, time/efficiency studies, economic impact analysis, etc.), the data that was collected and how it was analyzed, and any key findings or lessons learned.

The project developed a new written evaluation tool for use by judges and court staff. The additional evaluation tool is a Court personnel survey that was developed and approved by the Court in 202 (for implementation in 2023). The survey, to be administered twice annually, will collect feedback from the Court about project services and the extent to which they benefit unrepresented litigants seeking guardianship.

In 2022, Court observation evaluation was not practical because the Court guardianship hearings continued to be held via Zoom.

6.b. Upload any materials used for this additional evaluation method.

Guardianship_Project_Survey_for_COURT_PERSONNEL_(1)_(2).pdf
130.5 KB - 03/14/2023 6:28PM

Total Files: 1

Other Evaluation Materials (Optional)

1. Demographics

In addition to income, which is required by this grant to determine eligibility, the collection of demographic data from litigants served by this project is encouraged to the degree possible, especially as to zip code, age, gender, ethnicity, and primary language including proficiency with English. Upload any materials related to the collection of demographic data and/or analysis of this data.

Application Type: RFP:

Self-Represented Litigants Program Judge and Staff Survey

CCLS is collecting information on the Guardianship Project to assist self-represented litigants. The Guardianship Project includes the following:

Please indicate your agreement or disagreement, based on your experience as a judicial officer over the past six months, whether the following statements about the Guardianship Project to assist self-represented litigants:

	The Guardianship Program to assist self-represented litigants has:	Strongly Agree 5	Agree 4	Neither Agree nor Disagree 3	Disagree 2	Strongly Disagree 1	Not Applicable/No Opinion 0
1.	Improved the completeness and correctness of documents filed by self-represented persons						
2.	Improved the availability of necessary evidence and witnesses						
3.	Improved self-represented persons' ability to participate effectively in court proceedings						
4.	Improved self-represented persons' ability to "tell their stories"						
5.	helped create more realistic expectations in self-represented persons						
6.	reduced the need for court assistance to complete a hearing						
7.	reduced the amount of hearing time generally required for self-represented persons						

8. What are the three most pressing problems that self-represented persons continue to have in your court today and what, if anything, could the court do to address those problems?

A) Problem

What can CCLS Guardianship Project do about it?

B) Problem

What can CCLS Guardianship Project do about it?

C) Problem

What can CCLS Guardianship Project do about it?

9. What position do you hold at the court?

- ☐ Judicial officer
- ☐ Judge's office staff
- ☐ Judge's courtroom staff
- ☐ Public counter position
- ☐ Other _____

When you have completed the survey, please email back to **conniemflores@centralcallegal.org**.

Thank you very much for assisting the court by providing this information.

Guardianship Clinic Customer Satisfaction Survey

Demographic or Background Questions

1. What is your ethnic or cultural background?
☐ European ☐ Latino ☐ African-American ☐ Asian
☐ Native American ☐ Other ☐ I=d rather not say
2. What language do you most often speak at home?
☐ English ☐ Spanish ☐ Hmong/Laotian ☐ Cambodian
☐ Other _____ ☐ I=d rather not say
3. What is the highest grade you completed in school?
☐ 0 - 5 ☐ 6 -8 ☐ 9 - 11 ☐ High School Graduate/GED
☐ Some College ☐ College Graduate ☐ Post Graduate Study
4. What is your age? _____ 5. Are you disabled? ☐ Yes ☐ No
7. How did you hear about our services?

<input type="checkbox"/> Court Personnel	<input type="checkbox"/> Private Attorney	<input type="checkbox"/> Radio/Newspaper/Flyer
<input type="checkbox"/> District Attorney	<input type="checkbox"/> Friend or Relative	<input type="checkbox"/> Used services before
<input type="checkbox"/> Another Government or Social Service Agency	<input type="checkbox"/> Saw a Sign	
<input type="checkbox"/> A church or private assistance Organization	<input type="checkbox"/> Other	

General Satisfaction Questions

1. Overall, did you find the services helpful?
☐ Definitely ☐ Somewhat ☐ Not Sure ☐ Not Really ☐ Not at all
2. Overall, did staff seem to know what they were doing?
☐ Definitely ☐ Somewhat ☐ Not Sure ☐ Not Really ☐ Not at all
3. Would you recommend these services to a friend or relative with a similar problem?
☐ Definitely ☐ Somewhat ☐ Not Sure ☐ Not Really ☐ Not at all
4. Was the staff respectful and courteous to you?
☐ Definitely ☐ Somewhat ☐ Not Sure ☐ Not Really ☐ Not at all

5. In your opinion, were you able to explain your problem completely to a person you felt was listening to you?

☐ Definitely ☐ Somewhat ☐ Not Sure ☐ Not Really ☐ Not at all

6. After explaining your situation, were you given information that helped you understand your situation better?

☐ Definitely ☐ Somewhat ☐ Not Sure ☐ Not Really ☐ Not at all

7. If you went to a hearing on this matter, do you feel that the help/guidance you received from staff helped you present your case to the judge?

☐ Definitely ☐ Somewhat ☐ Not Sure ☐ Not Really ☐ Not at all

8. After attending the workshop, do you feel you were able to complete your forms and present your case to the judge?

☐ Definitely ☐ Somewhat ☐ Not Sure ☐ Not Really ☐ Not at all

9. Do you have any suggestions for improving the service? _____

10. Any other comments: _____

Thank you for taking the time to complete this survey, we value your opinion.

PARTNERSHIP GRANTS 2024 PROJECT ASSURANCES

Program Name: Central California Legal Services, Inc.

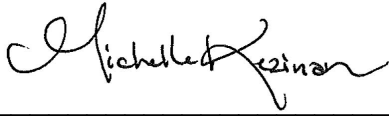
Project Title: Guardianship Project

Applicant assures compliance with the following:

1. Applicant agrees it will use any grant funds it receives from the Partnership Grants portion of the Equal Access Fund only for purposes allowed under the State Budget Act, upon approval thereof, and any grant agreement it enters into with the State Bar of California.
2. Applicant agrees to expend any grant funds solely on civil legal assistance to indigent* self-represented litigants in California courts. (*Business & Professions Code Section 6213(d))
3. Applicant will not discriminate based on race, color, national origin, religion, gender, disability, age, marital or domestic partnership status, medical condition, or sexual orientation.
4. Applicant will comply with quality control procedures adopted by the State Bar of California.
5. Applicant will permit reasonable site visits and will present additional information deemed reasonably necessary to determine compliance with the terms of a grant under the Partnership Grants portion of the Equal Access Fund.
6. Applicant will comply with fiscal management and control procedures adopted by the State Bar of California.
7. Applicant agrees to consult with the State Bar of California concerning media coverage of any project funded by a Partnership Grant.
8. Applicant understands that any proposal submitted for a Partnership Grant, and all documents submitted pursuant to issuance of a Partnership Grant, are public documents, and may be disclosed to any person.
9. Applicant assures that, to the extent this grant is being sought for an existing project, the funds will be in addition to, and will not supplant, current funding committed to that project. However, to the extent the applicant seeks to move some of the funding already committed to the project for use on other activities, the applicant will submit to the Commission an explanation of the need for the other activities, justifying the alternate use of the funds.
10. Applicant agrees it will cooperate with data collection processes or with research efforts of the State Bar of California or the Judicial Council to evaluate the Partnership Grants project.

11. Applicant acknowledges that it has read and will comply as fully as possible with the Guidelines for the Operation of Self-Help Centers in California Trial Courts, as affirmed February 28, 2011.

Signed:



Executive Director
Central California Legal Services

Michelle Kezirian

Print Name

Date: 03/10/2023



Chair (or other officer), Board of Directors
Central California Legal Services

William McComas

Print Name and Title

Date: 03/10/2023

Application Summary

Funding Opportunity: Partnership Grants
Project Title: Guardianship Project
Organization: Central California Legal Services

Partner Court Information

Presiding Judge	David C. Kalemkarian
Court Name	Fresno County Superior Court
Address	1100 Van Ness Avenue
City	Fresno
Country / Province	United States CA
Postal Code	93724
Court Phone	559-457-2010

My court has had an opportunity to review the applicant’s abstract describing proposed services to self-represented litigants in partnership with my court. I fully support the grant proposal as described below:

1. Project Abstract:

This project enjoys a successful record of assisting eligible self-represented litigants obtain guardianships for minor children, many of whom are already living with family or referred by Child Protective Services. Post-COVID, both parties are hopeful that the project will be fully operational by mid-2023. Staff members from the Fresno Superior Court Probate Division, the Fresno County Law Library, and CCLS will participate in twice-monthly clinics presented on first and third Friday mornings; however, the format of the clinics remains fluid with in-person clinics being the goal.

During the clinics, 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 clinic’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.

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.

2. Attorney-Client Relationship:

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Guardianship Project

Organization: Central California Legal Services

I understand the applicant does not plan to establish an attorney-client relationship and that customers will be made aware of the scope of services, as follows: The project services are available to both sides, those seeking the guardianship and those opposing the petition. Each self-represented litigant must sign a disclosure form which clearly explains the partners are not their lawyers, and may serve both sides. It further states that no attorney-client relationship is established. The disclosure informs the litigant the project services are offered by CCLS, an independent non-profit legal services provider. It also states the Court remains neutral at all times and the project is not operated by the Court. .

3. Impartiality of the court:

Applicant has advised the court that services will be provided to both parties or sides of a matter.

4. Alternative Services: The applicant has described the methods to be used to screen for subject matter eligibility, and the information and referral options that will be available for litigants who are ineligible for services due to income, subject matter, or residency:

Those determined not eligible for the project's services are referred to the Fresno County Law Library, the Court's Probate Division staff, and the Fresno County Bar Association's Attorney Referral Service. They are provided information regarding the available online resources including the Court's website.

The Probate Examiners are available to assist those have who attended the clinics 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.

The reasons for those determined to be ineligible are due to their need for assistance in an area of substantive law that is beyond the scope of the project or the minor in their care is under the jurisdiction of the Juvenile Court.

5. Memorandum of Understanding: I understand that, if the project is funded, the court and the applicant will memorialize the details of the partnership in a Memorandum of Understanding(MOU), which will reflect the depth of the partnership, including the respective areas of responsibility of the Court and the applicant, as well as plans for regular coordination meetings.

Status of MOU:

A new, fully executed MOU is enclosed.

6. Additional Comments, if any:

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Guardianship Project

Organization: Central California Legal Services

A handwritten signature in black ink, appearing to read "David C. Kalemkarian", enclosed within a thin black rectangular border.

Signature of Presiding Judge

Judge David C. Kalemkarian

Date March 16, 2023



Eligibility Category: LSP

Late Submission: ☐ Yes

Grant Year: 2024

Due Date: March 17, 2023 5:00pm PST

Prepared by: [Dana Springs](#)

Email: dsprings@sdvlp.org

Contact Phone: 619-235-5656

Funding Opportunity: Partnership Grants

Project Title: Central Division Restraining Order Clinic

Program Name: San Diego Volunteer Lawyer Program

Applicant Title: Deputy Chief for Administration

Address: 707 Broadway Suite 1400

City: San Diego

I verify that I have read, and am familiar with, the eligibility requirements and funding criteria for Partnership Grants.

Form A - Project Profile

Respond to the questions as concisely and completely as possible. All responses must be self-contained and should only refer to materials uploaded with this proposal.

1. Application Contact: Jennifer Nelson

Job Title: CEO

Email: jnelson@sdvlp.org

Telephone: 619-235-5656



2. Total Amount \$140,000

Requested:

Request project amounts
divisible evenly by
\$1,000.

3. Partner Court(s)

San Diego Superior Court

**4. County(ies) Served by
this Project:**

County(ies) Served by this Project

5. Substantive Area(s)

Family/Domestic Violence

6. Is the project currently funded by a Partnership Grant?

Yes

**a. Project Name for 2024 - Central Division Restraining Order Clinic
Refunding:**

**b. Total number of years 4
funded by Partnership
Grants, including any gap
years:**

**c. Has this project been No
funded by Partnership
Grants for over 5 years?:**



**d. For project more than 5 No
years, does this project
have any significant
changes, such as change
to location of host court
or substantive focus?:**

**e. Does this project No
support unmet rural
needs?:**

7. Project Abstract

Provide a brief summary of the core aspects of your proposed grant project, including the legal area to be addressed; the target constituency; the type(s) of services to be provided; the location and hours of operation for this project; project staffing; general nature of court participation; and main goals. Detailed information regarding these areas will be provided in Form B – Project Description. (250 word limit)

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 cut-off for walk-in assistance is 3:30 p.m. The CDROC is located on the 4th floor of the Central Courthouse at 1100 Union Street, San Diego, CA 92101.

Additionally, 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, and best practices for attending hearings virtually and in person.

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.



Form B - Project Description

1. Court Involvement

A successful proposal will indicate 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.

A formal letter of support and memorandum of understanding must be uploaded to Form F. See Application Instructions for detailed information about these documents.



a. Court Coordination

Describe the current and planned coordination and collaboration on this project with existing court-based services. (250 word limit)

SDVLP's collaboration with the San Diego County Superior Court (Court) in providing restraining order services at the courthouse dates back to 1989. SDVLP communicates regularly with the court concerning clinic operations and service delivery challenges, and discusses substantive law and procedural issues which affect the access of SRLs to the court system.

SDVLP engages in regular meetings with representatives of the Court, including the Family Law Facilitator (FLF), court administrators, court clerks, judicial officers, and officers from San Diego County's Sheriff's Office, to discuss collaboration issues. SDVLP coordinates quarterly Domestic Violence Stakeholder Meetings that convene these constituents to streamline communication and promote efficient coordination of court-based services.

The CDROC's services are closely integrated with the court-based services provided by the FLF. SDVLP has an agreement with the Court and the FLF wherein applicants who are a conflict of interest are referred to the FLF for priority access. SDVLP provides a referral slip to the applicant, so that the FLF is aware of the source and reason for the referral. The FLF's office is located on the same floor as the CDROC, and does not inconvenience the litigant requesting assistance. In addition to the FLF, the CDROC refers SRLs to the Legal Aid Society of San Diego (LASSD)'s court-based clinics, and the Center for Community Solutions (CCS)'s court-based clinic. SDVLP, LASSD, and CCS coordinate their court-based services in the cross-referral of litigants to ensure that survivors of domestic violence, elder abuse and dependent adult abuse receive appropriate and necessary legal services.

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 per month



c. Facilities and Court Resources

Identify all space and material resources being provided by the court, and any special access to facilities or data to be provided to the project or its staff. (250 word limit)

The Court utilizes the CDROC as the primary legal resource for DVRO litigants. As a result, the Court provides stand-alone 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. In addition to this office space, the Court provides the clinic with six desktop computers to support staff and volunteer workstations, a printer, an internal phone line and telephone, and additional utilities. To alleviate potential health and safety concerns arising from interacting with the public as a result of COVID-19, the Court also supplies a hand sanitizing station, rolling sneeze guards, and other safeguard barriers. The Court provides signage so that litigants can easily locate the CDROC and access its services, and lists the CDROC and its services on the Court's website. Additionally, the Court provides security at the CDROC.



d. Regular Meetings

Project staff should meet no less than quarterly with key court partners, with a formal agenda. Identify the schedule for these meetings, who is expected to participate, and any issues currently to be resolved. (250 word limit)

SDVLP organizes Domestic Violence Stakeholder meetings that include the FLF, court personnel, judicial officers, other domestic violence service providers, and officers from the San Diego County Sheriff's Office. These meetings are convened to address emerging domestic violence issues so that all community stakeholders can ensure that victims are being served effectively. Agenda items cover various topics including legal issues, service/enforceability, and access to services. Formal agendas are prepared and distributed to meeting participants prior to each meeting, and items for this agenda are solicited in advance from the other providers. The topics of discussion are advanced to the representative for the Sheriff's department and the judicial office, who are able to take the questions back to their colleagues to gather answers and explanations. Frequent topics of discussion involve the ways service and enforcement of restraining orders can be improved, through ensuring certain details are included on forms, and the education of non-legal providers as to what is sufficient information for service. These meetings are held virtually to allow for providers across San Diego County to attend. The accessibility of providers allows for more meaningful input and discussion, and a more uniform approach to DV services throughout the county.

SDVLP also communicates on an as-needed basis with court staff concerning clinic operations and service delivery challenges, and discusses substantive law and procedural issues which affect the access of SRLs to the court system. The CDROC also hosts annual focus groups with the judiciary and court staff.



e. Evaluation Support

The court is considered to be an equal partner in ensuring that the funded services are meaningfully evaluated. Identify the court's role in evaluating this project. (250 word limit)

SDVLP holds an annual focus group with a judicial officer, Court personnel, and SDVLP staff. The focus group is arranged by an SDVLP staff member who does not work within the CDROC program. During this focus group, Court staff and judicial officers have the opportunity to meaningfully and candidly evaluate and provide feedback on the services provided by the CDROC. Topics discussed include how the CDROC affects Court business, the effects of the CDROC on the litigants from the Court's perspective, the effect of the CDROC on Court staff, suggestions for CDROC improvement, and whether the CDROC is preparing litigants effectively. SDVLP staff completes a written summary and assessment of the focus group's discussions, which is reviewed by SDVLP's CEO, Supervising Attorney, and Staff Attorney. Revisions to the clinic policies and procedures are considered and implemented, as appropriate, based on feedback from the focus group.

SDVLP has provided DVRO services at the San Diego County Superior Court since 1989 and has developed an open communication channel with the Court during that time. In addition to the focus groups, the Court communicates regularly with SDVLP concerning operations and service delivery challenges, and discusses substantive law and procedural issues that affect the access of SRLs to the court system. As issues raised by the court arise, they are immediately addressed by SDVLP.

f. Describe if there are other aspects of court involvement that distinguish this project from other self-help clinics, or any court partnership information not provided above. (250 word limit)

In early 2023, the Court asked SDVLP if it could expand SDVLP's existing partnership with Your Safe Place – A Family Justice Center, located in downtown San Diego, to place a client care coordinator from the FJC at the CDROC. The client care coordinator will meet with SRL clients from the CDROC to assist in the non-legal, but vital, needs of a survivor who is leaving a violent relationship. The client care coordinator will be able to discuss shelter needs, safety planning, and provide the emotional support that many victims need during the time shortly after leaving the abusive situation. It is believed that with additional interventions available to clients, the likelihood of clients pursuing a permanent restraining order will increase, and the clients will be less likely to abandon their pursuit of a restraining order and return to unsafe situations. SDVLP already works closely with Your Safe Place to provide restraining order services at its downtown location, and is excited to work with the Court and Your Safe Place to make the holistic, wrap-around services offered by Your Safe Place accessible to SRLs at the CDROC.

2. Project Impact



A successful proposal will clearly describe the needs of the targeted population and how anticipated outcomes and related budget 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. Program's Qualifications

What is the applicant program's experience providing assistance to self-represented litigants, including court-based services? (250 word limit)

SDVLP's experience assisting SRLs spans nearly four decades. In 1984, SDVLP began assisting domestic violence survivors in completing the court forms to obtain restraining orders through a weekly clinic held at its main office in San Diego. Shortly thereafter, SDVLP collaborated with Lawyers Club of San Diego, the San Diego Superior Court, and several community-based agencies, to establish a court-based service delivery model which provided advice and brief services to survivors filing domestic violence restraining orders.

SDVLP has operated an SRL guardianship clinic at its main office for more than 22 years. A court-based guardianship clinic was also operated in the North County Regional Courthouse (NCRC) but discontinued due to the closure of probate courtrooms at that courthouse.

In 2006, SDVLP began offering SRLs legal assistance through a part-time Civil Harassment Restraining Order (CHRO) Clinic co-situated with SDVLP's North County DVRO clinic in the NCRC. In 2008, SDVLP opened an Unlawful Detainer clinic in the NCRC, providing self-help assistance to tenants and landlords with their eviction matters. In February 2012, SDVLP opened an alternate CHRO clinic in the NCRC. In January 2013, SDVLP opened a court-sited SRL Clinic in cases with custody disputes. This clinic has been operating remotely due to the pandemic, returning to in-person services in Fall 2023. In July 2023 SDVLP further expanded its restraining order services to assist SRLs at two additional locations in San Diego County: Your Safe Place – A Family Justice Center, and One Safe Place – North County Family Justice Center.

b. Needs Assessment



b.1. Does the project seek to serve a particular demographic group? If so, identify the groups:

- | | |
|--|---|
| <input type="checkbox"/> Children & Youth | <input checked="" type="checkbox"/> Domestic Violence Survivors |
| <input type="checkbox"/> Homeless | <input checked="" type="checkbox"/> Immigrants |
| <input type="checkbox"/> Incarcerated Individuals | <input type="checkbox"/> LGBTQ |
| <input checked="" type="checkbox"/> Limited English Proficiency | <input type="checkbox"/> Low-Income Landlords |
| <input type="checkbox"/> Low-Income Tenants | <input type="checkbox"/> Low Wage Workers |
| <input type="checkbox"/> Migrants | <input checked="" type="checkbox"/> Persons of Color |
| <input type="checkbox"/> Persons with Physical or Mental Health Disabilities | <input type="checkbox"/> Qualified Legal Services Providers |
| <input type="checkbox"/> Re-entry | <input type="checkbox"/> Refugees & Asylum |
| <input type="checkbox"/> Rural | <input checked="" type="checkbox"/> Seniors |
| <input checked="" type="checkbox"/> Sexual Assault Survivors | <input type="checkbox"/> Trafficking Survivors |
| <input type="checkbox"/> Veterans & Active Military | <input type="checkbox"/> Other |

b.2. Describe the geographic area(s) to be served by the project:

The CDROC is a walk-in clinic located at the Central division of the San Diego Superior Court. The Courthouse is located in downtown San Diego, serving the central regions of San Diego County. Due to the urgent needs of those seeking a restraining order, a request for a temporary order may be filed at any courthouse in San Diego. Therefore, while the CDROC is most accessible to SRLs residing in central San Diego, the CDROC has the ability to serve SRLs from across San Diego County.



b.3. Describe why the target population is in particular need of the services to be provided:

According to the U.S. Census Bureau, in 2021, San Diego County had an estimated population of 3,286,069. Approximately 43.8% of the population is White, followed by 34.8% Hispanic, 13.5% Asian/Pacific Islander, 5.6% Black, and other ethnic groups. Approximately 10.7% of the population lives in poverty.

The CDROC serves a diverse population, including teens, seniors, abused children, and members of San Diego's sizable minority populations. The typical clients served are non-Caucasian women with at least one child.

In the first half of 2022, 8,554 incidents of domestic violence were reported, a 2% increase over the number of incidents reported in 2018. According to a 22-year overview conducted by San Diego County's Fatality Review Team in December 2019, there was an annual average of 13 domestic violence homicides in the County in the past 22 years. In 2022, domestic violence accounted for 9% of the homicide incidents in which a motive could be determined. Domestic violence homicide victims were disproportionately black. People who are black make up less than 6% of our county's population yet constitute 15% of the DV homicide victims in our county, and 14% of the clients assisted by the CDROC in 2022.

The CDROC staff regularly observe court hearings to gain insight as to issues litigants are having in obtaining restraining orders when there is a need. Often, Judges are unable to proceed with a case due to service of process issues or due to a litigant's lack of understanding on what is relevant evidence and how to file evidence. The CDROC aims to help litigants overcome these barriers so that a Judge can rule on the merits of the case instead of dismissing a case for procedural issues when there are serious safety concerns to consider. The data supports the need for the CDROC to offer evidence and hearing preparation workshops for litigants to increase litigants' chances of receiving a restraining order after hearing.

CDROC staff also review a representative percentage of DVRO cases each year that have been prepared by the CDROC. In the first two weeks of June 2022, the CDROC prepared 48 orders, up from only 11 orders prepared during the same time period in 2020, and a substantial increase over the 26 orders prepared during the same time period in 2021. The growing number of restraining order filings demonstrates the increasing need for restraining order help among the target population, as well as the importance of the services the CDROC provides. In 2022, 100% of the orders filed in the representative sample were granted.

**c. Types of Services to be Provided**

Describe the legal issues to be addressed and the type and level of services to be offered by the project.
(250 word limit)

SDVLP will offer the following services to qualified SRLs in the CDROC: a) completion of all documents needed to obtain a domestic violence, elder abuse, or dependent adult abuse restraining order (DVRO/EARO); b) information and advice concerning the pro per process (for having the restraining order signed, filed and served); c) information and advice concerning the legal consequences of a DVRO/EARO; d) information and advice concerning the hearing(s) in connection with the DVRO/EARO (including the potential for Family Court Services mediation if the parties share children in common) and resources for legal advocacy and/or assistance at those hearings by other SDVLP staff, volunteers, or other agencies; e) education concerning court procedures and protocol, including how to present one's case in pro per at the hearings; f) referral to other appropriate resources, both legal and non-legal; and g) screening for referral to SDVLP's direct representation component, both at the DVRO/EARO hearing and subsequent family law cases.

CDROC will continue holding virtual live workshops to assist clients in preparing for their restraining order hearing. The CDROC will create 2-5 additional informational videos to distribute to clients. New videos will be created on topics related to domestic violence such as safety planning, the intersection between immigration and domestic violence, and the impact of restraining orders on child custody, and will also elaborate on current videos offered by the CDROC on service of process and filing evidence, by covering how to request alternate service of a restraining order and how to properly lodge evidence.

d. Language Access**d.1. Other than English, what languages will services be offered?**

- | | | |
|--|---|--|
| <input checked="" type="checkbox"/> American Sign Language | <input checked="" type="checkbox"/> Arabic | <input checked="" type="checkbox"/> Eastern Armenian |
| <input checked="" type="checkbox"/> Western Armenian | <input checked="" type="checkbox"/> Cantonese | <input checked="" type="checkbox"/> Farsi |
| <input checked="" type="checkbox"/> Hmong | <input checked="" type="checkbox"/> Japanese | <input checked="" type="checkbox"/> Khmer |
| <input checked="" type="checkbox"/> Korean | <input checked="" type="checkbox"/> Mandarin | <input checked="" type="checkbox"/> Portuguese |
| <input checked="" type="checkbox"/> Punjabi | <input checked="" type="checkbox"/> Russian | <input checked="" type="checkbox"/> Spanish |
| <input checked="" type="checkbox"/> Tagalog | <input checked="" type="checkbox"/> Thai | <input checked="" type="checkbox"/> Vietnamese |
| <input checked="" type="checkbox"/> Other | <input type="checkbox"/> None | |



Explain Other: SDVLP maintains a list of volunteers who speak sixty-one different languages, who are able to provide assistance. SDVLP also contracts with a telephone language interpretation service which provides interpretation services in a broad range of languages.

d.2. How are language services offered?

SDVLP utilizes several methods to address language barriers within the client population. First, given the region's sizeable Latinx population, affirmative efforts are made to recruit qualified bilingual (Spanish) candidates for vacant positions. All SDVLP Legal Administrative Assistants are bilingual in English and Spanish, including the Legal Administrative Assistant located onsite full time at the CDROC. The Legal Administrative Assistant is available to interpret and translate for SRLs as needed. All clinic forms, handouts, and resource materials are available in both English and Spanish.

Additionally, SDVLP maintains a list of volunteers who speak sixty-one different languages, and who are able to assist with interpretation and translation. SDVLP recruits members of ethnic and specialized bar associations to serve as attorney volunteers, such as the Pan-Asian Lawyers Association, the La Raza Lawyers Association, and the Iranian Bar Association. If a need for services in a language outside the scope of SDVLP staff and volunteers' capabilities arises, SDVLP contracts with a language interpretation service wherein a live person provides interpretation services via the telephone to assist with interviews and other necessary communications between SDVLP staff, volunteers, and clients.

SDVLP also hosts law student interns from San Diego's law schools, extending priority placement to those who are proficient in Spanish and have experience and/or interest in DVROs and family law.

d.3. Briefly describe the language capabilities among program staff.

All SDVLP Legal Administrative Assistants are bilingual in English and Spanish, including the Legal Administrative Assistant located onsite full time at the CDROC. In addition to the bilingual staff members, SDVLP maintains a list of volunteers who speak sixty-one different languages, and who are able to assist with interpretation and translation. SDVLP recruits members of ethnic and specialized bar associations to serve as attorney volunteers, such as the Pan-Asian Lawyers Association, the La Raza Lawyers Association, and the Iranian Bar Association. SDVLP also hosts law student interns from San Diego's law schools, extending priority placement to those who are proficient in Spanish and have experience and/or interest in DVROs and family law.



e. Coordination Efforts

Describe the current and planned coordination and collaboration on this project with other legal services providers, or other community organizations. (250 word limit)

SDVLP coordinates with law enforcement, the Court, social workers, other legal agencies, 2-1-1, and other social service agencies to ensure that SRLs are aware of the CDROC and how to access its services.

If an applicant is a conflict, SDVLP provides referrals to the FLF, which is located on the same floor as the CDROC, where they are given priority service. The Family Justice Centers, Legal Aid Society of San Diego, and Center for Community Solutions (CCS) coordinate in the cross-referral of clients to ensure that DV and family law litigants receive needed services. When the CDROC recognizes an SRL would benefit from another or a different legal remedy, the CDROC makes referrals to the proper legal aid provider. The list is long and is dependent upon the SRL's legal needs. SRLs also receive referrals to the San Diego County Bar Association's Lawyer Referral and Information Service as an alternate resource.

For human and social services referrals, the CDROC has created a safety planning resource which includes referrals to the Family Justice Centers, 2-1-1 San Diego, 911, San Diego County's 24-Hour DV Hotline, CCS, Women's Resource Center, Community Resource Center, and Crisis House.

SDVLP is currently working with the Court and the Family Justice Center located in downtown San Diego to place a client care coordinator onsite at the CDROC. In this way, the CDROC will be able to immediately address the non-legal needs facing survivors of domestic violence while they are waiting for their restraining order to be processed.

f. Proposed Services

f.1. Individual Services

f.1.a. Total number of individuals to be served (do not include family members and others impacted):

0



f.1.b. Select the applicable services that will be provided (select all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Information on Legal Options | <input type="checkbox"/> Information on Court Procedures and Hearing |
| <input type="checkbox"/> Document Preparation and Review | <input type="checkbox"/> Filing or Services Assistance |
| <input type="checkbox"/> Supervised Settlement Services | <input type="checkbox"/> Post-Hearing Assistance |
| <input type="checkbox"/> Other | |

f.1.c. Format/Description:

f.2. Workshops

f.2.a. Total number of workshops planned:

36

f.2.b. Total number of individuals expected to attend workshops (do not double count those served through individual services or self-help clinics):

60

f.2.c. Select the applicable services that will be provided:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Information on Legal Options | <input checked="" type="checkbox"/> Information on Court Procedures and Hearing |
| <input type="checkbox"/> Document Preparation and Review | <input type="checkbox"/> Filing or Services Assistance |
| <input type="checkbox"/> Supervised Settlement Services | <input type="checkbox"/> Post-Hearing Assistance |
| <input type="checkbox"/> Other | |



f.2.d. Format/Description:

CDROC workshops will be offered to self-represented litigants in Zoom webinar format. The goal of the workshops is to provide additional resources to self-represented litigants so they can better prepare for their restraining order hearings and have successful outcomes. Workshops will cover important topics such as how to interact with the Court, what constitutes proper service, and how to file evidence. These workshops will also provide information on best practices for attending hearings virtually. If an SRL does not have access to a video camera, they can access the webinar by telephone. During the webinar, attendees will be able to ask questions of the speaker using the “chat” feature. The workshops will be offered in English and Spanish. Workshops will be developed and executed by volunteer attorneys under the supervision of CDROC staff.

The information regarding how to access the SRL workshops is provided to SRLs at the CDROC, as well as the North and East divisions of the Superior Court. In addition, the information will be provided to individuals who seek services at Your Safe Place – A Family Justice Center, and One Safe Place – North County’s Family Justice Center.

f.3. Self-Help Clinics

f.3.a. Total Number of Clinics Planned:

1

f.3.b. Number of individuals to be served at clinics (do not double count with individual services or workshops):

3100

f.3.c. Select the applicable services that will be provided:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Information on Legal Options | <input checked="" type="checkbox"/> Information on Court Procedures and Hearing |
| <input checked="" type="checkbox"/> Document Preparation and Review | <input checked="" type="checkbox"/> Filing or Services Assistance |
| <input type="checkbox"/> Supervised Settlement Services | <input checked="" type="checkbox"/> Post-Hearing Assistance |
| <input checked="" type="checkbox"/> Other | |

Explain Other: Priority referrals of conflicts of interest to the Family Law Facilitator and referrals to other legal and non-legal service providers.



f.3.d. Format/Description:

SDVLP will offer the following services to qualified SRLs in the CDROC: a) completion of all of the necessary documents to obtain a domestic violence, elder abuse, or dependent adult abuse restraining order (DVRO); b) information and advice concerning the pro per process (for having the restraining order signed, filed and served); c) information and advice concerning the legal consequences of a DVRO; d) information and advice concerning the hearing or hearings in connection with the DVRO (including the potential for Family Court Services mediation if the parties share children in common) and possible resources for legal advocacy and/or assistance at those hearings by other SDVLP staff or volunteers or other agencies; e) education concerning court procedures and protocol, including how to present one's case in pro per at the hearings; f) referral to other appropriate resources, both legal and non-legal; and g) screening for referral to SDVLP's separately-funded direct representation program, both at the DVRO hearing and subsequent family law cases.

If the applicant is not a conflict, clinic staff will complete an intake form with the applicant to collect information necessary to determine if the SRL has grounds for a domestic violence or elder abuse restraining order. If there are no grounds for a domestic violence or elder abuse restraining order, the CDROC may provide counsel and advice on appropriate legal remedies and provide referrals. If there are grounds for a restraining order, the SRL will meet one-on-one for usually a minimum of 2 hours with the clinic staff attorney or volunteer who will draft their court forms, develop facts and evidence, and draft a detailed and compelling declaration, including exhibits evidencing abuse when available. When the TRO petition is completed, the forms are explained to the SRL, and the staff/volunteer confirms with the SRL that they understand what they are requesting and how a TRO functions. The staff attorney, or volunteer, explains the SRL's next steps for filing the request with the court's business office, also located within the courthouse, and serving the request on the restrained party. The CDROC also provides the SRL with appropriate referrals for supportive services and additional legal help, if the SRL has legal needs that are outside the scope of the restraining order services offered at the clinic. The SRL then files their request with the business office located in the courthouse.

If an SRL applicant at the CDROC clinic is a conflict or indicates they have legal issues that are outside the scope of the restraining order services offered at the clinic, they receive a referral to additional services. When an SRL cannot be assisted because they are a conflict of interest, the CDROC provides the SRL with a referral to the Family Law Facilitator (FLF), located within the same courthouse. This referral provides the SRL with priority services from the FLF to reduce their wait time for assistance. If an SRL is seeking assistance with additional legal issues, such as immigration, family law, or housing law matters that are beyond the scope of assistance offered at the CDROC, they will be provided with referrals to other legal services organizations, or to other SDVLP programs that may be able to assist them.



SRLs experiencing domestic violence often face numerous obstacles to escaping their abuse and require assistance in several other non-legal areas, including mental health counseling, housing, immigration, childcare, employment, public benefits, etc. The CDROC provides referrals to organizations that offer supportive services related to the abuse they may be facing.

At the court's request, SDVLP is also expanding its partnership with Your Safe Place, a Family Justice Center, in which a trained client care coordinator would be onsite at the clinic to provide non-legal services to the victims of domestic violence. Your Safe Place provides a range of services such as safety planning, housing and financial security, and counseling. This partnership will allow SRLs to meet with the staff member from Your Safe Place and receive onsite assistance and information.

**f.4. Total number of 3160
individuals to be served
(auto-calculated):**

g. Project Goals

Briefly describe the goal(s) for this project.

The goal of the CDROC is to keep survivors of domestic violence and elder abuse and their dependents safe from further abuse, through providing quality legal services on restraining order matters. Specifically, the CDROC staff and pro bono attorneys will counsel litigants on restraining order issues and/or draft these orders when necessary to be filed with the Court. The CDROC aims to increase the chances of the litigants obtaining not only the temporary restraining order, but also the permanent restraining order which may be granted after a noticed hearing. The CDROC is located at the Central Courthouse to provide these services in a direct and efficient manner so litigants can obtain their orders of protection within one day. Another related goal of the CDROC is to alleviate some of the burden on the court and court staff of dealing with pro per litigants by providing these litigants with advice, resources, and information so they are better prepared to help themselves. If a litigant does not qualify for a restraining order, CDROC staff still provide them with resources and information so they are able to get the help they need. Lastly, the CDROC aims to encourage the private bar in volunteering with the program, through taking shifts at the clinic, creating or presenting webinars and informational videos on domestic violence/elder abuse topics and/or, with the use of separate funding, taking restraining order cases for direct representation at the restraining order hearing. Engaging the private bar allows the CDROC to offer its services to significantly more people than would be possible with only the CDROC staff.



h. Outreach & Community Engagement

h.1. Outreach

Describe how you will communicate the availability of services to litigants and the community. (250 word limit)

SDVLP's CDROC has been in operation at the downtown San Diego Superior Court since 1989. Litigants who come to the courthouse seeking assistance with a DVRO are directed to the CDROC by Court staff including the FLF and business office. Law enforcement routinely refer survivors to the CDROC, as do other DV service providers and social service agencies, such as the two Family Justice Centers (FJC) in San Diego County - One Safe Place and Your Safe Place, Fleet and Family, and Child Welfare Services. The clinic information is also listed on the self-help services section of the San Diego Superior Court's website. Detailed information regarding these services is posted on SDVLP's website, along with information regarding other social service providers (such as 211), and on the CDROC flyer. SDVLP's promotional materials were recently redesigned and the updated materials for our programs and flyers will be distributed to the community.

SDVLP staff also attend and co-host community outreach events to provide information on the CDROC directly to potential litigants. For example, during Domestic Violence Awareness month in October 2022, SDVLP participated in the Family Justice Center's Community Resource fair. This event was a chance to meet other providers, and engage members of the community to educate them about domestic violence and services provided by SDVLP, which may be of assistance to them or someone they know. SDVLP staff also regularly attend San Diego Bar Association and other private bar events to educate attorneys where they may refer potential litigants.



h.2. Outreach Resources

Identify any new resource materials to be developed, who will be responsible for preparing those materials, and how they differ from materials already posted, i.e., at www.courts.ca.gov. (250 word limit)

CDROC staff regularly review and update existing resource material. In 2024, the CDROC will create 2-5 informational videos covering new topics and updating the contents of prior videos which will be made available to SRLs, such as how to obtain a power of attorney, immigration options for DV survivors, and safety planning tips. Additionally, resources will cover several changes to the law this year that will impact SRLs. Specifically, mandatory attorney fees for SRLs, and rules that SRLs should know in the event the Sheriff's office rejects their restraining order for service. Mandatory attorney fees will allow many SRLs the means to obtain private counsel for future proceedings that might follow the granting of their restraining order such as custody or divorce proceedings. Educating SRLs with regard to service will mean more restraining order hearings can proceed to the permanent order stage, and granted restraining orders are served and enforceable. Additional resource material will be developed to support the current virtual workshops on how to present evidence and prepare for virtual and in-person hearings. The resources will be prepared by the CDROC Staff Attorney or by volunteer attorneys working under her supervision. With the rapid changes to court procedure that occurred with the onset of the pandemic, these resources are vital to helping SRLs prepare for their hearing, and understand the way courts now proceed and the way they may best present their case at a hearing. All resource material will be provided in both English and Spanish.

3. Administration

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.

a. Grant Year Timetable

For existing and new projects, describe the proposed timetable for the implementation or continued administration of the project by quarter for the grant year. Indicate if any significant changes to existing operations are anticipated. (250 word limit)



Q1 (January-March): The CDROC will:

(250 word limit)

1. Provide one-on-one legal services to eligible survivors.
2. Identify 2-5 informational video topics related to DV or elder/dependent adult abuse such as how to obtain powers of attorney, tips on safety planning, immigration options for DV survivors, the impact of restraining orders on child custody, how to lodge documents with the Court to be used during a restraining order hearing, how to enter exhibits into evidence during a restraining order hearing, and requesting alternative service of a restraining order from the Court. The specific contents of the videos will depend on factors including the current law at the time of production, the specific expertise of the pro bono attorney, and noticeable trends in information gaps discussed at DV Stakeholders' meetings.
3. Recruit a volunteer attorney to develop one informational video under the supervision of the CDROC.
4. Continue to hold weekly virtual legal workshops for SRLs in English and Spanish covering topics such as important deadlines to know while pursuing a permanent restraining order, how Court proceedings are conducted and the Court's expectations of parties in their courtroom, how to serve a restraining order, how and when to request alternative service if a party is evading service, court rules and legal procedures required to ensure that an SRL is able to present evidence at their hearing, and best practices for attending hearings virtually.
5. Partner with the Court and Family Justice Center – Your Safe Place to have a client care coordinator sited at the CDROC.



Q2 (April-June): The CDROC will:

(250 word limit)

1. Provide one-on-one legal services to eligible survivors.
2. Finalize the first informational video and begin to distribute the video link to SRLs.
3. Recruit volunteer attorneys to develop two to five more informational videos under the supervision of the CDROC.
4. Continue to hold weekly virtual legal workshops for SRLs in English and Spanish covering topics such as important deadlines to know while pursuing a permanent restraining order, how Court proceedings are conducted and the Court's expectations of parties in their courtroom, how to serve a restraining order, how and when to request alternative service if a party is evading service, court rules and legal procedures required to ensure that an SRL is able to present evidence at their hearing, and best practices for attending hearings virtually.
5. Partner with the Court and Family Justice Center – Your Safe Place to have a client care coordinator sited at the CDROC.



Q3 (July-September): The CDROC will:

(250 word limit)

1. Provide one-on-one legal services to eligible survivors.
2. Finalize the second informational video and begin to distribute the video link to SRLs.
3. Continue to hold weekly virtual legal workshops for SRLs in English and Spanish covering topics such as important deadlines to know while pursuing a permanent restraining order, how Court proceedings are conducted and the Court's expectations of parties in their courtroom, how to serve a restraining order, how and when to request alternative service if a party is evading service, court rules and legal procedures required to ensure that an SRL is able to present evidence at their hearing, and best practices for attending hearings virtually.
4. Partner with the Court and Family Justice Center – Your Safe Place to have a client care coordinator sited at the CDROC.

Q4 (October-December): The CDROC will:

(250 word limit)

1. Provide one-on-one legal services to eligible survivors.
2. Finalize additional informational videos and begin to distribute the link(s) to SRLs.
3. Continue to hold weekly virtual legal workshops for SRLs in English and Spanish covering topics such as important deadlines to know while pursuing a permanent restraining order, how Court proceedings are conducted and the Court's expectations of parties in their courtroom, how to serve a restraining order, how and when to request alternative service if a party is evading service, court rules and legal procedures required to ensure that an SRL is able to present evidence at their hearing, and best practices for attending hearings virtually.
4. Partner with the Court and Family Justice Center – Your Safe Place to have a client care coordinator sited at the CDROC.



b. Staffing

b.1. Identify key personnel involved in staffing and supervising this project.

Bhavani Peesapati-Madero is the Supervising Attorney for SDVLP's restraining order clinics, and oversees the CDROC. Bhavani joined SDVLP in 2012 as the full-time, on-site Staff Attorney responsible for the day-to-day operations of the clinic. After a decade of experience at the CDROC, Bhavani was promoted to Supervising Attorney in 2023. As the Supervising Attorney, Bhavani manages the clinic, provides direct legal services to clients, and supervises and trains SDVLP staff attorneys and volunteers. Currently, Bhavani continues to be on-site at the CDROC three days a week. Bhavani also supervises two additional staff attorneys from SDVLP's family law program who operate the clinic on the other two days a week, Jake Zindulka and Morgan Darnell. Hilda Arreola, the Legal Administrative Assistant for the CDROC, is onsite five days a week. Hilda is a bilingual Spanish speaker, and has held her position since 2019. The Legal Administrative Assistant conducts screening, conflict checks, and intake for eligible clients.

Additional SDVLP staff members responsible for the CDROC include a Pro Bono Manager/Supervising Attorney, Deputy Chief for Administration, and Chief Executive Officer. Management of the clinic and supervision of volunteers is shared by executive and line staff to ensure effective program operations. The Pro Bono Manager/Supervising Attorney is responsible for recruiting attorneys and other volunteers to assist in service delivery. SDVLP's Pro Bono Manager/Supervising Attorney, Carrie Holmes, is an experienced family law practitioner and her prior experience in domestic violence and family law is of great benefit to the CDROC and the supervision, training, and recruitment of pro bono volunteers. Overall program and fiscal responsibility is within the purview of SDVLP's Chief Executive Officer.

b.2. Will supervision be provided on-site?

- ☒ Yes
- ☐ No



b.2.a. If yes, describe the steps that will be taken to ensure quality control.: SDVLP takes many steps to ensure the quality of the legal services provided at the CDROC. The onsite Supervising Attorney and Staff Attorney provide immediate supervision of clinic volunteers and other staff in the clinic, including the Legal Administrative Assistant. The SDVLP Supervising Attorney and Staff Attorneys mentor and train CDROC volunteers, are available to answer questions, and review all paperwork before it is filed. The CDROC maintains robust training materials, including a training manual that is provided to all staff and volunteers, with templates for court forms and pleadings to ensure consistency and accuracy across all filings. Filings prepared by the CDROC are labeled so that Court staff and judicial officers are able to identify them, and the CDROC has open communication with the Court's business office and the sheriff's office to ensure that if any errors or issues arise, they can be dealt with immediately.

c. Supervision of Volunteers

c.1. Will volunteers be utilized for this project?

- ☒ Yes
- ☐ No



c.1.a. If yes, please describe their anticipated role.: As SDVLP is a pro bono model organization, the CDROC uses a large number of pro bono attorney volunteers. The vast majority of CDROC volunteers are attorneys. The CDROC also utilizes law students and some paralegals, with a preference for bilingual volunteers. Under the supervision and direction of the on-site, full-time Supervising Attorney and Staff Attorneys, volunteers interview clients, prepare court forms, draft declarations and other paperwork. Volunteers also explain the court process to SRLs and provide information on the steps needed to complete the legal process of obtaining a restraining order, including filing and service of process requirements. Highly experienced volunteers may assist in mentoring and training other volunteers and reviewing their work. Volunteers sign up in advance for a designated shift in the CDROC, which can be performed in-person or remotely.

In addition to working one-on-one with clients, attorney volunteers also provide webinars and create informational videos for SRLs on the court hearing process and other legal topics, including how to introduce evidence in court and how to ensure that service of process has properly been completed.

c.2. Briefly describe how volunteers will be trained and supervised.: SDVLP volunteers receive extensive training. All volunteers, including those that volunteer remotely, are required to receive onsite training, and shadow the Supervising Attorney or Staff Attorneys and experienced volunteers during their initial clinic shifts. Volunteers also observe DVRO hearings to develop a more thorough understanding of domestic violence issues and applicable law. Training videos are also provided to volunteers, as well as a practice manual detailing court policies, procedures, forms, and other substantive legal information. The manual, which is available to both remote and in-person volunteers, also contains sample forms and declarations, and practice tips. Training programs are conducted throughout the year to recruit and train new pro bono panelists, and are offered as needed. All documents drafted by volunteers are reviewed by the Supervising Attorney, Staff Attorney, or an experienced volunteer attorney before filing.



d. Sub-Grants

Provide details for any sub-grant(s), including plans for oversight and evaluation of the services provided by the sub-grantee. (250 word limit)

N/A

e. Pro Se Document Review

How will the project ensure that documents are completed correctly? Who will conduct the review and when? (250 word limit)

As discussed above, the CDROC Supervising Attorney or Staff Attorney reviews all documents prepared by volunteers for accuracy and quality, prior to the SRL's departure for filing the documents. In some cases, CDROC volunteer attorneys who are highly experienced, and have received extensive training at the CDROC, may prepare and provide documents to SRLs without the CDROC Supervising or Staff Attorney's final review.

f. Eligibility for Services



f.1. Identify all criteria and guidelines used to establish eligibility for services and how the project screens for eligibility for services. 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.

(250 word limit): 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 to obtain protection from abuse, 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.

Applicants meet with a Staff Attorney, or CDROC volunteer for a screening interview to ensure that the subject matter falls within the statutory guidelines for DVROs (or other type of restraining order). Intake personnel are trained on this screening process. 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.

Finally, SDVLP does not assist individuals who already have an attorney of record. These individuals will be referred to their attorneys for assistance.

f.2. Will this project serve non-indigent persons?: ☒ Yes
☐ No



f.2.a. If yes, please identify the non- Partnership Grant funds that will cover this work.: In limited exigent situations in which an applicant requires immediate assistance, SDVLP will assist SRLs who are non-indigent. In instances where there is not an emergency, applicants who do not fall within the financial eligibility guidelines will be given relevant legal educational materials, referrals to the FLF, or referrals to the local bar association lawyer referral service. However, an estimated 90% of the SRLs who seek assistance at the CDROC each year meet the income eligibility guidelines based on the standards set forth for State Bar Legal Services Trust Fund Program grant recipients.

For many years, SDVLP has utilized various foundation grants to support this project (these have included the Lawyers Club Fund for Justice, the San Diego County Bar Foundation, the Judicate West Foundation, and the SDG&E Foundation, among others). In addition, other SDVLP revenue is also directed to project support. This revenue is derived from unrestricted contributions such as cy pres awards and private donations, and proceeds from SDVLP's signature fundraising event, the Justice for All Celebration.



f.3. Identify any resources or referrals to be provided to litigants who are not eligible for this project's services. (250 word limit): 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.

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.

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.

g. Attorney-Client Relationship

g.1. Will this project establish an attorney-client relationship?: Yes



g.1.a. If yes, describe how project staff will check for client conflicts, and how individuals will be served if a conflict is identified, i.e. referrals to a conflict panel, independent contractor, etc. (250 word limit): A conflict check on each potential litigant is performed prior to providing legal services. The CDROC has direct, online access to SDVLP's database for conflict check purposes. SDVLP has an agreement with the Court and the Court's Family Law Facilitator (FLF) wherein those with conflicts are referred to 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.

This response will be included in the Letter of Support template on Form F of this application.

h. Impartiality of the Court

h.1. Impartiality of the Court: Yes

Will this project serve only one party or side of a matter?



h.2. Identify which side will be served, and why the project has established this limitation? What are the social implications of this decision? How will this project address any risk to the appearance of the court's impartiality as a result of limiting services to one side of these matters? (250 word limit): The CDROC primarily serves Petitioners who are seeking assistance with a Domestic Violence, Elder Abuse, or Dependent Adult Abuse Restraining Order. The CDROC will also provide assistance to Respondents who want to file for protection against the opposing party if, after conducting a conflict check, the Respondent's case falls within the statutory guidelines for requesting a restraining order. SDVLP strongly believes that it is essential to provide legal information to advise survivors of domestic violence, elder abuse, and dependent adult abuse. Effective preparation of a restraining order application requires obtaining confidential information from the victim. Without the formation of an attorney-client relationship and the confidentiality that the relationship ensures, the victim may be placed in more danger, either through the victim's decision not to proceed with the assistance due to the lack of candor and confidentiality, or through the possibility that information provided by the client to SDVLP could be revealed in subsequent court proceedings.

This response will be included in the Letter of Support template on Form F of this application.

In order to ensure the independence and impartiality of the Court, signage at the CDROC clearly identifies the clinic as a project of SDVLP. The staff and volunteers are clearly identified as SDVLP affiliates and all materials reflect this identification. With respect to SDVLP's policy to provide services to one party only, applicants found ineligible due to a conflict are referred to the FLF, where they are afforded priority assistance. SDVLP has provided this service at the San Diego County Superior Court since 1989.

4. Continuity Planning

A successful proposal will address whether its proposed services can continue with funds other than those provided by Partnership Grants and provide details of past efforts and future plans to secure such alternate funding.

Refer to RFP requirements regarding funding priorities.



a. Describe plans to obtain funding that will sustain this project's services beyond the typical Partnership Grant funding cycle. (250 word limit)

For many years, SDVLP has utilized various foundation grants to support this program (these have included the Lawyers Club Fund for Justice, the San Diego County Bar Foundation, the Judicate West Foundation, and the SDG&E Foundation, among others). SDVLP plans to continue to apply for funding from these local organizations, corporations, and foundations, which have demonstrated their commitment to supporting domestic violence work.

In addition, other SDVLP revenue is also directed to program support. This revenue is derived from unrestricted contributions such as cy pres awards and private donations, and proceeds from SDVLP's signature fundraising event, the Justice for All Celebration. Each year, SDVLP emphasizes to our donors and supporters the importance of our domestic violence work, and the need to support the CDROC. SDVLP attorneys also conduct domestic violence trainings at law firms to encourage pro bono involvement at the CDROC, which have resulted in significant financial contributions by the firms. Additionally, SDVLP may use both Equal Access and IOLTA funds to support the CDROC.

b. List all funding sources that have been explored or pursued for this Partnership Grant project in the last twelve months.

Specifically identify applications submitted, amounts requested, revenue raised for project operations, and any funds that were obtained by leveraging the Partnership Grant. This section may also be used to explain any barriers to pursuing funds. (250 word limit)

In 2022, SDVLP requested that the San Diego Superior Court provide additional funding to support the CDROC, other than in-kind support. The Court was unable to provide additional funds to support the CDROC. As a result, SDVLP requested that EAF and IOLTA funds be used to support the CDROC. In order to secure additional funding for the CDROC for current and future years, SDVLP has made its domestic violence clinics a focus of its fundraising efforts. SDVLP's signature annual fundraiser, the Justice for All Celebration, returned to a successful in-person event in 2022. The event emphasized the impact of the pandemic on increasing incidences of domestic violence, the importance of SDVLP's domestic violence work, and the need for financial support of our domestic violence clinics, including the CDROC.



c. Other Efforts

Describe any other efforts to support continuity planning, such as recruitment of volunteers or pursuing in-kind support (250 word limit)

SDVLP employs a pro bono model of service across all its programs, including the CDROC. SDVLP conducts outreach to legal groups and law firms to recruit volunteers. For the past two years, the Staff Attorney for the CDROC has been a panelist for the annual POWER Act presentation, which is a collaboration with the Federal Bar and the Judiciary, to encourage pro bono involvement from attorneys in empowering survivors of domestic violence. One of the Central Courthouse family law judges was a co-panelist in the August 2022 Power Act presentation and offered insight on the impact on judicial officers when SRLs have pro bono help due to his experience presiding over cases with SRLs assisted by the CDROC. This presentation has increased pro bono involvement at the CDROC and has also led to another unique partnership with the United States Attorney's Office, in which AUSAs provide pro bono assistance at the CDROC.

Due to the pandemic, the CDROC developed a more resilient and sustainable infrastructure. The CDROC now has the capacity to support a team of both remote and in-person volunteers. The CDROC has found that many attorneys enjoy the flexibility allowed by remote volunteering, an option that was not available pre-pandemic, which has contributed to an increase in volunteer hours.

5. 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.

Projects must submit detailed reporting and evaluation materials after each grant year. These will include an expenditures report, information on the demographics of clinic customers, findings from client satisfaction surveys, a report on meetings with court partners, and at least one additional evaluation modality.

a. Project Services



1. Upload a copy of your most recent Partnership Grant Evaluation

SDVLP-2022-Evaluation_Partnership_Mid_Year.pdf
155.3 KB - 03/17/2023 12:08PM

Total Files: 1

2. For existing projects, provide a brief summary of services provided in the current year with any relevant highlights, benchmarks, challenges, etc. What changes have been made to the project over the past year, and what changes are anticipated in the upcoming grant year?

In 2023, the CDROC has continued providing in-person restraining order services to SRLs in coordination with the court, and with the support of in-person and remote volunteers. These services are offered at a walk-in clinic at the Central Courthouse Monday through Friday from 8:30 a.m. to 5:00 p.m. In March of 2023, Bhavani Peesapati-Madero was promoted from CDROC Staff Attorney to Supervising Attorney for SDVLP's restraining order clinics. In this role, she will be able to devote more time to the recruitment of volunteer attorneys, conduct community outreach, and further develop SDVLP relationships with DV providers. It is believed that these changes will result in an increase of volunteer attorneys providing services. Since Bhavani's promotion, the CDROC has already had measurable success in volunteer recruitment, partnering with a major law firm to staff the CDROC with several pro bono attorneys in honor of International Women's Day.

COVID-19 continues to impact CDROC operations and causes longer periods of absence for staff members due to illness. To avoid closing the clinic if staff members are out sick, 5 SDVLP staff attorneys are now trained to supervise the restraining order clinic. The vast majority of SDVLP's Legal Administrative Assistants are trained to provide bilingual administrative support in case of the absence of CDROC's Legal Administrative Assistant.

SRLs seeking services at the clinic face enormous hurdles in leaving a violent situation, and have needs that go beyond the legal services that can be provided by the CDROC. The CDROC provides information and referrals to SRLs to address these needs, but the SRLs could benefit from additional support. In one client satisfaction questionnaire a client commented, "It would be nice if there was more time to chat." At the Court's suggestion, SDVLP is currently expanding our partnership with the Family Justice Center – Your Safe Place, which provides wrap-around social services to survivors of domestic violence. Family Justice Centers such as Your Safe Place enable survivors to access numerous services in one location, remove the barriers that come with having to travel to various locations for help, and prevent survivors from having to repeat their story, which is often retraumatizing for them and their children. SDVLP already partners with Your Safe Place to provide legal services on-site at Your Safe Place's downtown



facility. In an expansion of this partnership, Your Safe Place would place a client case coordinator on-site in the CDROC. This would allow the client case coordinator to meet with SRLs about their non-legal needs related to domestic violence. SRLs will be able to address safety planning issues, housing needs, even options available for people who are afraid to leave because they might not want to leave a pet behind. It is hoped that providing these wrap-around services at the Court will provide these SRLs with services they might otherwise not have sought out, and provide them with the additional support they might need as they seek a permanent restraining order.

b. Satisfaction Surveys

1. Upload a copy of the Satisfaction Survey now in use, or a proposed survey to be implemented in the coming grant year

Client_Satisfaction_Questionnaire_EngSpan.pdf
194.5 KB - 03/17/2023 12:02PM

Total Files: 1



2. Describe how the survey will be distributed, and how data will be gathered and analyzed. (250 word limit)

Client Satisfaction Questionnaires, written in both English and Spanish, are provided by the CDROC to each SRL for whom the CDROC staff prepares a temporary restraining order. After a client is helped with the TRO, CDROC staff provides the SRL with the CSQ, along with a closing packet of information, and requests that they fill it out with their feedback. In 2022, approximately 1196 CSQs were distributed to clients asking if services were satisfactory, if their legal issue was resolved, and if they had suggestions for improvement. In 2023, a new survey was adopted based on a template provided by the State Bar.

Completed questionnaires are reviewed by the CDROC Staff Attorney after they are received, and by the Supervising Attorney and the Chief Executive Officer on a monthly basis. Responses to each question are tracked in an Excel spreadsheet, so that trends in SRL satisfaction with services can be observed. If a concern or suggestion is raised and within our control to resolve, management addresses the issue with CDROC staff or the Court in an effort to make sure that CDROC services are of the highest possible quality for all litigants seeking assistance at the CDROC.

The overwhelming majority of responses in 2022 were positive and included comments such as, "I really needed this service and couldn't have afforded them if I had to pay," and "Thank you for stating my case accurately and being so helpful and understanding."



c. Identify at least one additional evaluation methodology to be used in assessing the impact or efficacy of this project's services. (250 word limit)

SDVLP will review the outcomes for a representative sample of DVRO cases for CDROC clients filed during a specified period at the downtown courthouse. SDVLP will compile data on the number of clients who actually filed their applications for restraining orders; the number of clients granted temporary restraining orders; the number granted restraining orders after the hearing; the number of cases that were dismissed; and the number of cases in which the client obtained private counsel.

In addition, SDVLP will organize a focus group with a judicial officer, Court business office personnel, and SDVLP staff. A SDVLP staff member unrelated to the domestic violence and family law projects conducts these focus groups to encourage transparency and frank communication. During this focus group, Court staff have the opportunity to provide meaningful and candid feedback on the services provided by the CDROC. The feedback includes directly comparing filings prepared by CDROC with filings prepared by litigants themselves, the impact the CDROC has on operations at the business office, and the effect of the CDROC on the litigants and their own positions in the Court as business office clerks or judicial officers. Filings prepared by the CDROC are labeled so that Court staff and judicial officers are able to identify them and can therefore provide more accurate and applicable feedback. This also allows the Court staff and judicial officers the opportunity to compare filings prepared by the CDROC and filings prepared by individuals themselves, or through other legal aid or court-based organizations/services.

Form C - Project Budget

Program Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
1. Lawyers	\$69,268	\$8,500	\$4,755	\$82,523
2. Paralegals	\$0	\$0	\$0	\$0
3. Other Staff	\$32,638	\$16,707	\$2,574	\$51,919
4. SUBTOTAL	\$101,906	\$25,207	\$7,329	\$134,442
5. Employee Benefits	\$18,343	\$4,537	\$1,319	\$24,199
6. TOTAL PROGRAM PERSONNEL	\$120,249	\$29,744	\$8,648	\$158,641

Program Non-Personnel



Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total
7. Space	\$0	\$688	\$0	\$688
8. Equipment Rental and Maintenance	\$439	\$154	\$0	\$593
9. Office Supplies	\$1,010	\$990	\$0	\$2,000
10. Printing and Postage	\$0	\$0	\$0	\$0
11. Telecommunications	\$0	\$0	\$0	\$0
12. Technology	\$1,465	\$515	\$0	\$1,980
13. Program Travel	\$0	\$0	\$0	\$0
14. Training	\$0	\$0	\$0	\$0
15. Library	\$0	\$0	\$0	\$0
16. Insurance	\$733	\$194	\$0	\$927
17. Evaluation	\$0	\$0	\$0	\$0
18. Contract Service to Clients	\$0	\$0	\$0	\$0
19. Other	\$0	\$0	\$0	\$0
20. TOTAL PROGRAM NON-PERSONNEL	\$3,647	\$2,541	\$0	\$6,188
TOTAL PROGRAM	\$123,896	\$32,285	\$8,648	\$164,829
Administrative and Overhead				
21. Admin Personnel	\$9,912	\$2,583	\$692	\$13,187
22. Admin Non-Personnel	\$6,192	\$1,614	\$432	\$8,238
TOTAL ADMINISTRATIVE	\$16,104	\$4,197	\$1,124	\$21,425
TOTAL AMOUNT OF FUNDS	\$140,000	\$36,482	\$9,772	\$186,254

1. Lawyers

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
CEO	0.00	0.00	0.02	0.02
Supervising Attorney & Pro Bono Manager	0.30	0.08	0.02	0.40



Staff Attorney	0.50	0.00	0.00	0.50
TOTAL LAWYERS	0.80	0.08	0.04	0.92

2. Paralegals

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
TOTAL PARALEGALS	0.00	0.00	0.00	0.00

3. Other Staff

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Legal Admin Assistant	0.65	0.33	0.05	1.03
Pro Bono Administrative Coordinator	0.00	0.01	0.00	0.01
TOTAL OTHER STAFF	0.65	0.34	0.05	1.04
TOTAL PERSONNEL (in FTEs)	1.45	0.42	0.09	1.96

Form D - Budget Narrative

Personnel

Account Title	Proposed Partnership Grant	Narrative
1. Lawyers	69268	Pro Bono Manager/Supervising Attorney coordinates the recruitment and training of volunteers for the Domestic Violence Program; Supervising Attorney handles cases in Downtown Clinic as well as oversees Staff Attorneys and service delivery for the Domestic Violence Program; Staff Attorneys provide services to clients
2. Paralegals	0	



3. Other Staff	32638	Legal Administrative Assistant provides administrative support to staff and supervising attorneys; Pro Bono Coordinator provides assistance with placement of cases with volunteer attorneys.
4. SUBTOTAL	101906	
5. Employee Benefits	18343	Employee benefits include social security, unemployment insurance, life and AD&D insurance, workers compensation, employer contributions to medical, dental and vision insurance plans, and employer 401(k) matching.
6. TOTAL PROGRAM PERSONNEL	120249	

Non-Personnel

Account Title	Proposed Partnership Grant	Narrative
7. Space	0	Court provides space for court-sited CDROC staff.
8. Equipment Rental and Maintenance	439	Allocated based on FTEs for CDROC, consistent with Uniform Guidance.
9. Office Supplies	1010	Projected actual expenses
10. Printing and Postage	0	
11. Telecommunications	0	
12. Technology	1465	Allocated based on FTEs for CDROC, consistent with Uniform Guidance.
13. Program Travel	0	
14. Training	0	
15. Library	0	
16. Insurance	733	Allocated based on FTEs for CDROC, consistent with Uniform Guidance.
17. Evaluation	0	
18. Contract Service to Clients	0	
19. Other	0	
20. TOTAL PROGRAM NON-PERSONNEL	3647	
Administrative		
21. Admin Personnel	9912	8% de minimis rate. General management expenses are consistent with most recent audited financial statements.



22. Admin Non-Personnel

6192

5% de minimis rate. General management expenses are consistent with most recent audited financial statements.

TOTAL ADMINISTRATIVE

16104

TOTAL AMOUNT OF FUNDS

140000

Form E - Project Assurances

Download the Assurances document and upload a signed copy below.

Upload PDF Version of
Signed Assurances
Document:

2024_Project_Assurances_Signed_3_2023.pdf
607.9 KB - 03/17/2023 12:08PM

Total Files: 1

Form F - Agreement of the Partner Court

Any uploaded Letter(s) of Support and MOU are listed below and also attached at the end of this pdf.

1. Upload Letter(s) of
Support:

2024_Form_F-Agreement_of_the_Partner_Court_2023-0314.pdf
1.2 MB - 03/16/2023 3:59PM

Total Files: 1



2. Upload MOU(s):

Refer to application instructions for MOU requirements.

CDROC_Partnership_MOU_3_2023.pdf
489.3 KB - 03/17/2023 12:08PM

Total Files: 1

MOU Expiration Date or Continuing:

Opportunity ID: 12985116

Staff Review

Project Budget: No Revision Required

Signed Assurances Document:

Court Letter(s) on File:

MOU(s) Approved:

MOU Expiration Date or Continuing:

All Services at Courthouse:

Application Review Complete:

Second Cycle:



The State Bar of California

San Diego Volunteer Lawyer Program - Evaluation - Partnership - Mid Year - 07/29/2022

Grant Type: Partnership Grants

Type: Evaluation - Partnership
- Mid Year

Status: Submitted

Evaluation Year: 2022

Partnership Grant Project: Central Division
Restraining Order Clinic

Partnership Grant Award Amount: \$93,000

Reporting Period: January 1, 2022 - June 30,
2022

Form A - Expenditures

1.a. Provide an explanation for any discrepancies from your approved budget:

This includes whether you have any unspent funds or if any of the line items in the "Expenses through 06/30" column deviate from your "Approved Budget" column.

N/A

Note: Grantees with approved carryovers are permitted to spend down their 2021 Partnership Grant awards through June 30, 2022. Additional reporting of these funds will be required in July 2022, which will be communicated to grantees under separate cover.

Form B - Activities

1. Identify the focus area(s) of the project:

Select all that apply.

Domestic Violence and/or Civil Harassment

Explain "Other":

2. Demographics

2.a. Did the project seek to serve a particular demographic group? If so, identify the group(s):

Select all that apply.

Domestic Violence Survivors, Limited English Proficiency, Persons of Color

2.a.1. Explain "Other":

2.b. Other than English, in what language(s) were services offered?

Select all that apply.

American Sign Language, Arabic, Eastern Armenian, Western Armenian, Cantonese, Farsi, Hmong, Japanese, Khmer, Korean, Mandarin, Portuguese, Punjabi, Russian, Spanish, Tagalog, Thai, Vietnamese

2.b.1. Explain "Other":

2.b.2. How are language services offered?

Select all that apply.

☒ Bilingual staff/volunteers (Spanish)

☐ Bilingual staff/volunteers (languages other than Spanish)

☐ Multilingual staff/volunteers (if not included above)

☒ Interpreters

☐ Translation Service

☐ Other

☐ N/A

Please indicate the number of bilingual (Spanish) staff/volunteers, position(s), FTE(s) and if funded by Partnership Grant funds.

1 bilingual staff member, and 2 bilingual volunteer attorneys are funded by Partnership Grant funds. The staff member is .9 FTE, and the two volunteer attorneys are .03 FTE.

Please describe which language(s) are most often used for the Partnership Grant project for interpretation services.

Spanish was the language most often used for interpretation services. Bilingual volunteer attorneys and a bilingual staff member helped meet this need. If staff members, volunteers, court interpreters, or interpreters provided by the client are unable to provide interpretation, an interpretation service is used.

2.c. Was there a need for services in additional languages beyond those that the project was able to provide? If so, which ones?

In addition to Spanish, the project was also able to provide services to clients who spoke: Tagalog, Farsi, Portuguese, Turkish, Amharic, Bengalis, Mandarin, Creole and Vietnamese. The project delivered services to these clients with the assistance of court interpreters, or interpreters provided by the clients.

3. Litigant Assistance

Include any assistance provided through this project to help litigants represent themselves in court, whether in individual or group settings. Totals may reflect overlap in the number of people served.

For reporting purposes, actual services will be calculated by a pro rata percentage of Partnership Grant expenses of total project expenses as of the reporting period.

Partnership Grant Pro Rata Calculation (Part 1)

Goals and Actuals (Part 2)

3.a. Goals and Actuals

Click the “Open” button to report on goals and actuals. In the “Goal” column, enter the goal numbers for the full grant period (12 months or 21 months). In the “Actual” column, enter the actual services provided for the reporting period. For reporting purposes, the “Pro Rata” column will automatically calculate based on the numbers entered in the “Actual” column. Grantees who received PG 2.0 supplemental funding should combine deliverables for their 2022 Partnership Grant and PG 2.0 grant.

Goals and Actuals

	Goal (Full grant period)	Actual (Reporting period)	Pro Rata (Reporting period)
Total Number of Workshops provided	36	21	13.44
Total Number of Individuals served	120	28	17.92
Total Number of Individuals who received one-on-one services (not including family members and others impacted)	1400	2848	1822.72

3.b. Were all goals met? ☒ Yes
: ☐ No

3.c. If goals were not met, explain why: The project has exceeded its mid-year goal for number of workshops provided and total number of individuals who received one-on-one services. The attendance at workshops has been lower than anticipated. The project will conduct more outreach to improve workshop attendance during the second half of the year.

Services Provided			Actual	
Group-Setting Services	# of Workshops	Pro Rata	# of Individuals	Pro Rata
Information on Substantive Legal Options	0	0	0	0
Information on General Court Processes and Procedure	0	0	0	0
Document Preparation or Review	0	0	0	0
Trial/Hearing Preparation	21	13.44	28	17.92
Other	0	0	0	0

Individually-Delivered (one-on-one) Services	# of Individuals	Pro Rata
Information on Substantive Legal Options	955	611.2
Information on General Court Processes and Procedure	1090	697.6
Document Preparation or Review	661	423.04
Filing Assistance	1495	956.8000
Mediation/Settlement Assistance	0	0
Trial/Hearing Preparation	0	0
Post-Trial/Hearing Assistance	0	0
Other	0	0

Explain "Other":

4. Referrals

Only report one referral per individual in the first appropriate category on the list. For example, if someone was referred to another legal services provider **and** to a social service agency, indicate the referral on the "Other Provider" line.

Referred To	Number of Individuals Referred
Another legal aid provider	281
Court-based provider of legal information, such as the Self-Help Center	862
Private Bar (LRS of individual private lawyers not affiliated with program)	38
Provider of human or social services (non-legal)	591
Other source of assistance, none of the above	471
Total Number of Individuals Referred	2243

4.b. Why were individuals referred for service elsewhere?

Select all that apply.

Individual was ineligible for services, Individual needed assistance in a substantive area of law beyond the scope of the project, Individual needed extensive services beyond the scope of the project, Conflict of interest, Individual needed supplemental services

Explain "Other":

5. Resource Materials

5.a. Upload materials developed or substantially revised for this project during the reporting period.

Include informational or substantive materials for litigants, administrative materials for staff who are assisting on this project, and evaluation or survey materials for use by either litigants or staff.

Cassidy_ProBono.m4v

136.1 MB - 07/28/2022 6:51PM

DTDV_TRO_Closing_Instructions.pdf

738.9 KB - 07/28/2022 6:54PM

DV_Basics_2022.pptx

209.2 KB - 07/28/2022 6:54PM

DV_Hearing_Webinar_Powerpoint.pptx

1.7 MB - 07/28/2022 6:54PM

Evidence_-_DV_hearings.pptx

635.7 KB - 07/28/2022 6:51PM

Evidence_and_Service_Info_DV.pdf

744.8 KB - 07/28/2022 6:54PM

Evidencia_-_Violencia_Domestica_pptx.pdf

187.1 KB - 07/28/2022 6:51PM

How_to_get_Police_Report_Chart.pdf

448 KB - 07/28/2022 6:54PM

SP_DT_TRO_Closing_Instructions.pdf

167.9 KB - 07/28/2022 6:54PM

Sample_Intent_to_Lodge_From_D-235.pdf

73.6 KB - 07/28/2022 6:51PM

Sample_POS_DV-200.pdf

342.1 KB - 07/28/2022 6:51PM

Sp_Evidence_and_Service_Info_DV.pdf

510.8 KB - 07/28/2022 6:54PM

Total Files: 12

5.b. Briefly describe each resource material.

Indicate if materials are newly developed or revised, and how many of each were distributed.

The DVROC developed material for an evidence workshop in both English and Spanish. This material will be used in weekly presentations beginning July 2022. The DVROC also developed a sample Domestic Violence Proof of Personal Service (DV-200) form, a sample Lodgment form, and developed material for an informational video "Executing Personal Service." In addition to the new material, the DVROC updated materials providing information on hearings, evidence (English/Spanish), a chart explaining how to obtain police reports, and a Domestic Violence Basics for Family Law PowerPoint.

6. COVID-19

6.a. How were Partnership Grant project goals and deliverables impacted by COVID-19?

Select all that apply.

- | | |
|---|--|
| <input type="checkbox"/> Court/Agency backlog impacting time to obtain outcomes for clients | <input type="checkbox"/> Decrease in case volume |
| <input type="checkbox"/> Decrease in call volume | <input type="checkbox"/> Decrease in # of workshops |
| <input type="checkbox"/> Decrease in # of clinics | <input type="checkbox"/> Decrease in # of in-person events |
| <input type="checkbox"/> Decrease in pro bono attorney availability | <input type="checkbox"/> Increase time spent on cases/client hours |
| <input type="checkbox"/> Limited client access to technology | <input type="checkbox"/> Offered services in a new substantive area |
| <input type="checkbox"/> Staffing issues | <input checked="" type="checkbox"/> Difficulty recruiting volunteers |
| <input type="checkbox"/> No impact | <input checked="" type="checkbox"/> Other |

Explain "Other": Remote volunteer opportunities were implemented at the onset of the COVID-19 pandemic and remain an option for the CDROC.

Form C - Evaluation

1. How was litigant feedback obtained as part of project evaluation? (Check all that apply)

Select all that apply.

- | | | |
|---|---|--|
| <input type="checkbox"/> Case Outcomes | <input type="checkbox"/> Client Database | <input type="checkbox"/> Email Inquiries |
| <input type="checkbox"/> Focus Groups | <input type="checkbox"/> Interviews (Phone) | <input type="checkbox"/> Interviews (Feedback) |
| <input checked="" type="checkbox"/> Informal Feedback | <input type="checkbox"/> Surveys (Mail) | <input type="checkbox"/> Surveys (Phone) |
| <input checked="" type="checkbox"/> Surveys (In-Person) | <input type="checkbox"/> Surveys (Electronic) | <input checked="" type="checkbox"/> Meetings (Taskforce/Coalition) |
| <input checked="" type="checkbox"/> Meetings (Court) | <input type="checkbox"/> Volunteer Feedback | <input type="checkbox"/> Other |

Explain "Other":

2. Identify any changes that have been made to the project from the description provided in the approved grant proposal. Describe changes to key project personnel or staff roles, why they were necessary, and the impact of those changes.

Christine Hall became the Supervising Attorney effective May 1, 2022. She is an experienced family law attorney as well as a staff attorney with SDVLP for the past six years. She is supervising the Central Domestic Violence Restraining Order Clinic. With additional EAF funds, the program was able to add part-time support from additional staff attorneys.

3. Did project evaluation indicate whether litigants who received services through the project were better able to pursue or conclude their litigation successfully and efficiently, compared to those who did not receive such services? If so, explain.

Clients provided commentary in their surveys that indicate they were better equipped to pursue their litigation. Clients commented when they arrived at the Court they did not understand the process to obtain a TRO, but after meeting with the attorney and/or volunteer, they had a clear understanding of the process. For example, one client commented, "The two women who helped me today were extremely helpful, knowledgeable, and kind in the process. This has been very overwhelming but they both make this process easy. Thank you."

4. Satisfaction Surveys

4.a. Upload a copy of the satisfaction survey used during the reporting period.

Client_Satisfaction_Questionnaire_EngSpan.doc
278 KB - 07/12/2022 8:56PM

Total Files: 1

4.b. How many satisfaction surveys were sent to litigants?

571

4.c. How many satisfaction surveys were received from litigants?

41

4.d. What did the responses reveal about the overall satisfaction of litigants?

The clinic received Client Satisfaction Surveys from 41 clients during this reporting period. The survey asks three questions: 1. Were you satisfied with the help you received? 2. Were your questions or legal issue resolved successfully? 3. Are there any ways we could improve our services?

In all 41 surveys questions 1 and 2 were answered with "yes." Clients provided the following feedback: "Very good help, they make me feel that I was not alone." "Everyone was so extremely helpful, answered all my questions, were very helpful, explained all the process and made me feel better." "Gracias." "Muchas gracias par su atencion." ("Thank you very much for your attention.")

5. Court Partnership

5.a. Explain how project and court staff coordinated services. Describe any operational changes made as a result of that coordination and any anecdotal information or feedback received.

The Court continues to provide office space to the CDROC as well as signage, security and utilities. The CDROC is the primary legal resource for DVRO litigants. SDVLP continues to communicate with the Court concerning operations and service delivery challenges, as well as discussing substantive law and procedural issues that affect the access of Self Represented Litigants to the court system. SDVLP will be holding the annual focus group in August to collect more feedback from Court personnel and will adapt services when possible to best meet the needs of the survivors who seek services at the clinic.

5.b. Briefly describe the court partner meetings. How many meetings were held, who attended them, what topics were generally discussed, and are there any pending issues yet to be resolved?

Two Domestic Violence Stakeholder meetings were provided during this reporting period on March 22, 2022, and June 23, 2022. Attendees included other domestic violence service providers, a representative from Family Court Services, a representative from the Family Law Business Office, the Supervising Family Court Judge, and a representative from the Sheriff's department. Topics addressed included service of the temporary restraining orders, enforcement of the restraining orders, and enforcement of child custody orders. Because of these meetings, providers were able to identify common issues with service of restraining orders and directly address these concerns to the Sheriff's department.

6. Additional Evaluation Method

6.a. Describe the additional evaluation method that was implemented for this project (e.g. courtroom observations, focus groups, court/case file reviews, time/efficiency studies, economic impact analysis, etc.), the data that was collected and how it was analyzed, and any key findings or lessons learned.

A focus group will be held in August to obtain feedback from key court personnel regarding the CDROC services. It is anticipated that the attendees will include a representative of the Family Court Business Office and a Family Court Judge.

Additionally, SDVLP will collect data from a representative period in the remainder of this grant year, to determine the outcomes of cases for SRLs served by the CDROC. The data that will be collected is as follows:

- Number of clients who completed a request for a restraining order
- Number of clients who actually filed their paperwork
- Number of clients granted restraining orders after hearing
- Number of clients with cases still pending
- Number of cases that were dismissed
- Number of clients who obtained direct representation through SDVLP

6.b. Upload any materials used for this additional evaluation method.

Other Evaluation Materials (Optional)

1. Demographics

In addition to income, which is required by this grant to determine eligibility, the collection of demographic data from litigants served by this project is encouraged to the degree possible, especially as to zip code, age, gender, ethnicity, and primary language including proficiency with English. Upload any materials related to the collection of demographic data and/or analysis of this data.

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Total Files: 1

Client Satisfaction Questionnaire – Restraining Order Clinic
Cuestionario de Satisfacción del Cliente – Clínica de Ordenes de Restricción

You received help at a Restraining Order Clinic operated by San Diego Volunteer Lawyer Program, Inc., and we are interested in your feedback. Please answer the following questions to help us improve our services and meet the diverse needs of future clients. */Usted recibió asistencia del Programa de Abogados Voluntarios de San Diego, Inc. y estamos interesados en sus comentarios. Favor de contestar las siguientes preguntas para ayudarnos a mejorar nuestros servicios y satisfacer las múltiples necesidades de nuestros clientes futuros.*

1. The staff explained things to me clearly. / El personal me explicó las cosas con claridad.

Strongly Agree/ <i>Totalmente de Acuerdo</i>	Agree/ <i>De Acuerdo</i>	Somewhat Agree/ <i>Algo de Acuerdo</i>	Somewhat Disagree/ <i>Algo en Desacuerdo</i>	Disagree/ <i>Desacuerdo</i>	Strongly Disagree/ <i>Totalmente en Desacuerdo</i>
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2. I received the information I needed. / He recibido la información que necesitaba.

Strongly Agree/ <i>Totalmente de Acuerdo</i>	Agree/ <i>De Acuerdo</i>	Somewhat Agree/ <i>Algo de Acuerdo</i>	Somewhat Disagree/ <i>Algo en Desacuerdo</i>	Disagree/ <i>Desacuerdo</i>	Strongly Disagree/ <i>Totalmente en Desacuerdo</i>
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3. I know what I need to do next. / Sé lo que tengo que hacer a continuación.

Strongly Agree/ <i>Totalmente de Acuerdo</i>	Agree/ <i>De Acuerdo</i>	Somewhat Agree/ <i>Algo de Acuerdo</i>	Somewhat Disagree/ <i>Algo en Desacuerdo</i>	Disagree/ <i>Desacuerdo</i>	Strongly Disagree/ <i>Totalmente en Desacuerdo</i>
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4. Overall, I am satisfied with the services I received. / En general, estoy satisfecho con los servicios recibidos.

Strongly Agree/ <i>Totalmente de Acuerdo</i>	Agree/ <i>De Acuerdo</i>	Somewhat Agree/ <i>Algo de Acuerdo</i>	Somewhat Disagree/ <i>Algo en Desacuerdo</i>	Disagree/ <i>Desacuerdo</i>	Strongly Disagree/ <i>Totalmente en Desacuerdo</i>
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5. How could services be improved? / ¿Cómo se pueden mejorar los servicios?

6. What other services would be helpful to you? / ¿Qué otros servicios le serían útiles?

Date / Fecha: _____

(March 2022)

PARTNERSHIP GRANTS 2024 PROJECT ASSURANCES

Program Name: San Diego Volunteer Lawyer Program, Inc.
Project Title: Central Division Restraining Order Clinic

Applicant assures compliance with the following:

1. Applicant agrees it will use any grant funds it receives from the Partnership Grants portion of the Equal Access Fund only for purposes allowed under the State Budget Act, upon approval thereof, and any grant agreement it enters into with the State Bar of California.
2. Applicant agrees to expend any grant funds solely on civil legal assistance to indigent* self-represented litigants in California courts. (*Business & Professions Code Section 6213(d))
3. Applicant will not discriminate based on race, color, national origin, religion, gender, disability, age, marital or domestic partnership status, medical condition, or sexual orientation.
4. Applicant will comply with quality control procedures adopted by the State Bar of California.
5. Applicant will permit reasonable site visits and will present additional information deemed reasonably necessary to determine compliance with the terms of a grant under the Partnership Grants portion of the Equal Access Fund.
6. Applicant will comply with fiscal management and control procedures adopted by the State Bar of California.
7. Applicant agrees to consult with the State Bar of California concerning media coverage of any project funded by a Partnership Grant.
8. Applicant understands that any proposal submitted for a Partnership Grant, and all documents submitted pursuant to issuance of a Partnership Grant, are public documents, and may be disclosed to any person.
9. Applicant assures that, to the extent this grant is being sought for an existing project, the funds will be in addition to, and will not supplant, current funding committed to that project. However, to the extent the applicant seeks to move some of the funding already committed to the project for use on other activities, the applicant will submit to the Commission an explanation of the need for the other activities, justifying the alternate use of the funds.
10. Applicant agrees it will cooperate with data collection processes or with research efforts of the State Bar of California or the Judicial Council to evaluate the Partnership Grants project.

11. Applicant acknowledges that it has read and will comply as fully as possible with the Guidelines for the Operation of Self-Help Centers in California Trial Courts, as affirmed February 28, 2011.

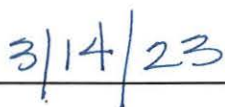
Signed:




Executive Director
San Diego Volunteer Lawyer Program



Print Name

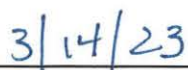
Date: 



Chair (or other officer), Board of Directors
San Diego Volunteer Lawyer Program



Print Name and Title

Date: 

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Central Division Restraining Order Clinic

Organization: San Diego Volunteer Lawyer Program

Partner Court Information

Presiding Judge	Michael T. Smyth
Court Name	San Diego County Superior Court
Address	1100 Union Street
City	San Diego
Country / Province	United States CA
Postal Code	92101
Court Phone	619-844-2500

My court has had an opportunity to review the applicant's abstract describing proposed services to self-represented litigants in partnership with my court. I fully support the grant proposal as described below:

1. Project Abstract:

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 cut-off for walk-in assistance is 3:30 p.m. The CDROC is located on the 4th floor of the Central Courthouse at 1100 Union Street, San Diego, CA 92101.

Additionally, 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, and best practices for attending hearings virtually and in person.

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.

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Central Division Restraining Order Clinic

Organization: San Diego Volunteer Lawyer Program

2. Attorney-Client Relationship:

I understand the applicant plans to establish an attorney-client relationship and has provided the following protocol for conducting conflict checks: A conflict check on each potential litigant is performed prior to providing legal services. The CDROC has direct, online access to SDVLP's database for conflict check purposes.

SDVLP has an agreement with the Court and the Court's Family Law Facilitator (FLF) wherein those with conflicts are referred to 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. .

3. Impartiality of the court:

Applicant has advised the court of which side will be served and explained the reasons for this decision, the steps taken to explore all implications of the decisions, and to address any risk of impropriety on the court's part as follows: The CDROC primarily serves Petitioners who are seeking assistance with a Domestic Violence, Elder Abuse, or Dependent Adult Abuse Restraining Order. The CDROC will also provide assistance to Respondents who want to file for protection against the opposing party if, after conducting a conflict check, the Respondent's case falls within the statutory guidelines for requesting a restraining order.

SDVLP strongly believes that it is essential to provide legal information to advise survivors of domestic violence, elder abuse, and dependent adult abuse. Effective preparation of a restraining order application requires obtaining confidential information from the victim. Without the formation of an attorney-client relationship and the confidentiality that the relationship ensures, the victim may be placed in more danger, either through the victim's decision not to proceed with the assistance due to the lack of candor and confidentiality, or through the possibility that information provided by the client to SDVLP could be revealed in subsequent court proceedings. In order to ensure the independence and impartiality of the Court, signage at the CDROC clearly identifies the clinic as a project of SDVLP. The staff and volunteers are clearly identified as SDVLP affiliates and all materials reflect this identification. With respect to SDVLP's policy to provide services to one party only, applicants found ineligible due to a conflict are referred to the FLF, where they are afforded priority assistance. SDVLP has provided this service at the San Diego County Superior Court since 1989.

4. Alternative Services: The applicant has described the methods to be used to screen for subject matter eligibility, and the information and referral options that will be available for litigants who are ineligible for services due to income, subject matter, or residency:

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Central Division Restraining Order Clinic

Organization: San Diego Volunteer Lawyer Program

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.

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.

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.

5. Memorandum of Understanding: I understand that, if the project is funded, the court and the applicant will memorialize the details of the partnership in a Memorandum of Understanding (MOU), which will reflect the depth of the partnership, including the respective areas of responsibility of the Court and the applicant, as well as plans for regular coordination meetings.

Status of MOU:

A new, fully executed MOU is enclosed.

6. Additional Comments, if any:

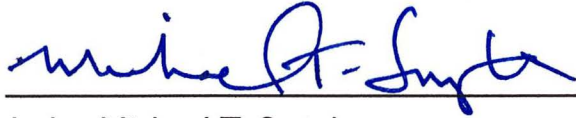
Application Summary

Funding Opportunity: Partnership Grants


Project Title: Central Division Restraining Order Clinic

Organization: San Diego Volunteer Lawyer Program

Signature of Presiding Judge

A handwritten signature in blue ink, appearing to read "Michael T. Smyth", written over a horizontal line.

Judge Michael T. Smyth

A handwritten date in blue ink, "March 14, 2023", written over a horizontal line.

Date

MEMORANDUM OF UNDERSTANDING

The SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO (Court) and SAN DIEGO VOLUNTEER LAWYER PROGRAM, INC. (SDVLP) hereby agree as follows:

The Court and SDVLP will collaborate in the operation of a Central District Restraining Order Clinic (CDROC) located in the Central Court facility and operated by SDVLP as follows:

The Court and SDVLP agree to participate in regular coordination meetings, which may be held on a quarterly basis or as agreed to by the parties.

The Court will:

1. Continue to provide space in the Central Courthouse in which SDVLP may operate the CDROC during hours in which the courthouse is open.
2. Continue to provide security for the clinic in connection with regular security provided with the courthouse.
3. Continue to provide utilities.
4. Continue to refer persons to the CDROC, where appropriate.

SDVLP will:

1. Continue to operate the CDROC Monday through Friday, excluding Court holidays, during the hours of 8:30 a.m. to 5:00 p.m., and continue to accept walk-ins until 3:30 p.m. The CDROC will be staffed by an SDVLP staff attorney and volunteers (attorneys, law students, and others).
2. Continue to provide legal/procedural information and prepare Domestic Violence, Elder Abuse or Dependent Adult Restraining Order (DVRO) forms, which litigants file in pro per. The clinic will not provide direct representation or make court appearances on behalf of litigants.
3. Continue to provide the Court with any statistical information concerning CDROC customers requested by the Court.
4. Continue to provide SDVLP-owned computers and software, supplies, and other equipment, as necessary.
5. Continue to refer ineligible customers to the Family Law Facilitator's (FLF) office, Legal Aid Society of San Diego (LASSD), Center for Community Solutions

(CCS), and the San Diego County Bar Association, when appropriate.

6. Continue to indemnify and defend the San Diego Superior Court, its officers, agents, employees and volunteers from any loss, expense, claim, or demand to which they may be subject as a result of any death, injury, loss, destruction, or damage to any person or property, caused by SDVLP staff or volunteers, whether by negligence or intentional, within the court facilities in which the CDROC is conducted. Individuals working in the CDROC are subject to background checks conducted by the Court.

Paid SDVLP staff working in the CDROC are subject to immediate removal at the Court's request with or without cause.

The parties agree that each is acting in an independent capacity and not as officers, employees, or agents of the other party.

All expenses other than those mentioned in this agreement will be borne by SDVLP.

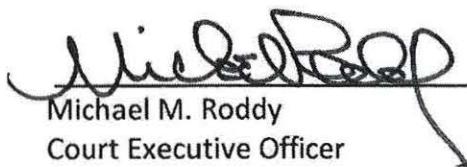
This MOU is effective from January 1, 2024 through December 31, 2024. This agreement may be modified by mutual agreement between the two (2) parties to the agreement. Written requests for modification will be forwarded by one party to the other party not less than 30 days prior to the desired effective date.

This Memorandum of Agreement may be terminated by either party with or without cause upon 30 days written notice to the other party. _____

IN WITNESS WHEREOF, the parties hereto have caused this agreement to be executed and mutually agree to all of the above provisions of this agreement.

Dated: 3-13-23

Dated: 3-14-23


Michael M. Roddy
Court Executive Officer
Superior Court of California,
County of San Diego


Jennifer L. Nelson
Chief Executive Officer
San Diego Volunteer Lawyer Program, Inc.