



The State Bar of California

2024–2025 Bank Community Stabilization and Reinvestment (Bank Grant) Grant Request for Proposals

BACKGROUND

In 2015 and 2016, the State Bar of California received over \$50 million from Bank of America and Citi in accordance with bank settlements with the U.S. Department of Justice (U.S. DOJ). These national settlements provided funds to Interest on Lawyers' Trust Accounts (IOLTA) organizations in every state for "foreclosure prevention legal assistance and community redevelopment legal assistance." The Legal Services Trust Fund Commission (LSTFC) has since allocated about \$49.96 million to fund 123 awards through several rounds of competitive and formula grants, as well as 74 planning grants.

On March 24, 2023, the LSTFC approved the distribution of \$4,758,503—the remaining Bank Community Stabilization and Reinvestment Grant (BCSR) funds—for 2024–2025 bank community stabilization and reinvestment grants (2024–2025 bank grants). After administrative costs of approximately five percent (\$237,933), the amount available for 2024-2025 bank grants is \$4,520,570 as described below. 2024–2025 bank grant applications are due on August 30, 2023, at 5:00 p.m. (PDT).

ELIGIBILITY TO APPLY

Eligibility to apply for a 2024-2025 bank grant is restricted to qualified legal services projects (QLSPs) or support centers as defined in Business and Professions Code section 6213. Applicants must have received an IOLTA grant from the LSTFC for 2023. Projects must provide legal assistance in either foreclosure prevention or community redevelopment as defined below. Projects must include a minimum of one partnership or subgrant. Partners and subgrant recipients need not be current QLSPs or support centers and may also be community-based organizations or local jurisdictions. Funding caps are based on the total number of organizations collaborating on the project.

GRANT PARAMETERS

The Bank Grants Committee (Committee) has approved the following grant parameters for making 2024 – 2025 bank grant awards:

1. 2024–2025 bank grants may only fund work in foreclosure prevention or community redevelopment legal assistance:
 - **Foreclosure prevention legal assistance:** Proposals should describe how grant funds will prevent foreclosure in the communities served. Applicants should discuss specifically which foreclosure trends and ongoing borrower needs the project seeks to address, and how the proposed services will meet those needs. Strategies may be across a broad range of options including but not limited to advice and counsel, representation, mediation programs, or policy and impact work. Regardless of strategy, projects should reflect an understanding of the current needs and challenges within the communities to be served, knowledge of successful models, flexibility and creativity, and necessary collaborations to achieve stated goals.

Examples of legal assistance for foreclosure prevention include:

- Outreach and education on the foreclosure process and legal options;
- Review of loan documents and counseling regarding the viability of the loan modifications, and triage for state or federal violations, including Homeowner Bill of Rights violations;
- Loan modification assistance, including forbearance agreements and repayment plans for debt forgiveness or reduction, interest rate reduction, or extending time for payment. Also, transition options, including short sale, deed in lieu of foreclosure, and cash for keys;
- Negotiation, mediation, and litigation to address service violations;
- Loan modification denial appeals;
- Reverse mortgage advice to older adults;
- Pursuing affirmative actions to restore title in other contexts, such as consumer fraud, predatory lending, or financial abuse;
- Legislative or administrative advocacy; and
- Policy advocacy and support services to increase capacity and foster collaboration with local, state, and national groups on any of the issues above.

By the terms of the bank settlement agreement, grants in this category must “prevent foreclosure.” Therefore, protecting the rights of a tenant generally will not be considered for funding under this category. However, if, in proposing a project, the applicant can justify why the project falls within U.S. DOJ settlement parameters, it should do so with documented evidence.

Proposals that include work that is clearly not qualifying—such as eviction defense for individual tenants in already foreclosed properties—will likely not

receive funding. Applications will be reviewed based on the information provided and it is the applicant's responsibility to establish, in the original application, the connection to qualified purposes.

Alternatively, applicants may propose:

- **Community redevelopment legal assistance:** Proposals should describe how grant funds would be used for community redevelopment legal services. Proposed projects should promote economic development by providing legal services that revitalize or stabilize low-income communities. Strategies may include counseling advocacy groups, transactional law, representation, or policy and impact work. Regardless of strategy, proposals should reflect an understanding of the current needs and challenges within the communities to be served, and the knowledge of successful models for meeting those needs. The applicant should have established partnerships that advance the stated goals.

Applicants should present projects that will have lasting impact on communities. For this grant, community redevelopment legal assistance is different than legal aid to specific individuals. **For individual services to qualify as community redevelopment work, the services must be tied to broader systemic work that benefits the community.**

Examples of community redevelopment legal assistance include:

- Transactional support such as developing the capacity of nonprofit organizations that serve low-income communities; supporting projects typically considered community development such as development and preservation of affordable housing, childcare, senior centers, job training centers, day labor centers, etc.; or support for micro-businesses and low-income entrepreneurs, or other local and community-owned services (e.g., childcare and credit unions);
- Developing the capacity of low-income community members to advocate on behalf of their community with respect to proposed laws or legislative action, whether by representing a nonprofit organization or a community group;
- Representation of low-income communities with respect to community conditions (e.g., with respect to environmental justice, equity in transit-oriented development, prevention and elimination of homelessness, inclusion of affordable housing, and other matters that protect the healthy development of communities);
- Legal assistance that is transformative to a community, promotes systemic change, promotes economic security, and/or has broad impact;
- Redevelopment assistance to cities and counties (e.g., ensuring that localities and developers meet their obligations to provide adequate relocation assistance and replacement housing for families displaced by

redevelopment);

- Devising program, policy, and legislative solutions to the loss of affordable housing, other affordable housing advocacy to combat displacement and enforce redevelopment law;
- Developing anti-displacement and gentrification-prevention strategies;
- Strategies to eliminate and prevent conditions of blight; and
- Legislative or administrative advocacy.

If an applicant submits a proposal that includes work that is clearly not community redevelopment—such as direct legal immigration help or direct public benefits legal assistance—that proposal will not likely receive funding. Applications will be reviewed based on the information provided and it is the applicant’s responsibility to establish, in the original application, the connection to qualified purposes.

2. **Partnerships and/or subgrants:** Projects must be proposed by a QLSP or support center partnering with or subgranting to at least one other organization. There is not a specific date by which partnerships and/or subgrant relationships must have been established, however, the proposal should describe how the partnership(s) and/or subgrant(s) strengthen the project. If applicable, the application must also describe how these collaborations will enable applicants to expand services and/or populations reached. **Applicants may receive a higher score in this category if they subgrant to—rather than simply partner with—the other organization(s).**
3. **Preference for serving rural populations:** Applicants may receive points if they establish that their services will benefit rural Californians. The California Commission on Access to Justice recommends defining “rural” as areas that meet the medical service study area (MSSA) standard for “rural” or “frontier.” The California Office of Statewide Health Planning and Development identifies MSSAs using sub-county clusters of census tracts. The California Commission on Access to Justice argues that MSSA categories of rural and frontier—as opposed to urban—are better suited than counties to classify rural areas. Rural MSSAs have 50,000 or fewer residents and population densities below 250 people per square mile. Frontier MSSAs have population densities of fewer than 11 people per square mile.¹
4. **Funding Caps:** There is no minimum amount of funding that projects may request. The maximum that an applicant may request is determined by the total number of partnerships and/or subgrants involved in the project. Each project must consist of one QLSP or support center applying for the 2024-2025 bank grant and at least one partnership and/or subgrant.

Applicants may propose to partner with or subgrant to both IOLTA and non-IOLTA providers. Subgrants do not change a project’s funding cap. If a QLSP or support center

¹ MSSA data is available on the California State Geoportal at <https://gis.data.ca.gov/datasets/CHHSAgency::medical-service-study-areas/explore?filters=eyJERUZJTklUSU90IjpbIjJ1cmFslwiRnJvbnRpZXliXX0%3D&location=36.206796%2C-118.684374%2C7.63>. This link provides data with the following filters for definition: “Rural” and “Frontier.”

applies for a grant and is also a subgrantee for another project, the subgrant amount will not count towards the funding cap in their application. However, the total amount requested per organization (as an applicant and subgrantee) may be taken into consideration when determining grant awards. QLSPs and support centers that both apply for a grant and are listed as a subgrantee must demonstrate that the separate grants will not fund the same activities.

The funding caps will be:

- Two organizations (including the applicant) may apply for up to \$250,000 per year for a total of \$500,000 over two years;
- Three organizations (including the applicant) may apply for up to \$300,000 per year for a total of \$600,000 over two years;
- Four organizations (including the applicant) may apply for up to \$375,000 per year for a total of \$750,000 over two years; and
- Five or more organizations (including the applicant) may apply for up to \$450,000 per year for a total of \$900,000 over two years.

The Committee seeks to fund high-impact projects that, within the scope of U.S. DOJ settlement parameters, provide foreclosure prevention or community redevelopment legal assistance. The Committee also seeks to fund a diversity of projects throughout the state.

SCORING CRITERIA

LSTFC award decisions are final and without appeal. A successful proposal will persuasively describe the applicant's ability to perform the proposed work, including, among other factors:

- Identifying how the proposed project aligns with scope of foreclosure prevention or community redevelopment legal assistance as this RFP describes above.
- Articulating the needs of a defined target population(s), with consideration to indigency, and to other particularly underserved communities, such as those of persons with limited-English language proficiency, immigrant populations, or persons with disabilities. While there are no income-eligibility requirements for this funding, proposals must demonstrate what income levels the project will serve. Income eligibility might be, for example, service to persons at 400 percent of the federal poverty threshold, or 80 percent of the Home Affordable Modification Program level for the county, particularly if the target population is an underserved community.
- Describing the anticipated outcomes of the services, including the number of people that will be served, and the nature of the impact on the targeted population(s). Applicants should identify goals of specific partnerships/subgrants, activities, and deliverables they seek to achieve with this grant. Grant deliverables must be achievable within the period of the proposed grant. While funding a portion of a project (e.g., impact litigation) coupled with other funding as a bigger project, or over a longer term,

will be considered, the proposal should articulate the specific deliverables that will be achieved with this grant funding during the grant period.

- Explaining the extent to which an applicant already has developed necessary relationships or has demonstrated the ability to collaborate with community organizations, local jurisdictions, or other stakeholders to accomplish their goals.
- Detailing the value added to the project through strategic subgrants (if any).
- Identifying the applicant's qualifications and ability to perform the proposed work, as well as how the proposed project fits within the applicant's current programming.
- Highlighting how (if at all) the project would serve clients in rural communities.

Additionally, the Committee seeks to fund a diversity of projects and will take into consideration various factors such as geographic region, program size, and project type.

The Committee has adopted the following rubric to guide its deliberations:

Category	Exceeds expectation	Meets expectation	Below expectation	Not addressed
Project impact and strategies: The applicant proposes a project that significantly and directly addresses or will address a compelling need for the particular foreclosure prevention or community redevelopment intervention(s).				
Number of points	X25 points	X19 points	X11 points	X0 points
Administration: The applicant demonstrates that it has the organizational capacity (e.g., supervision structure and resources) that it needs to meet the proposal objectives. The applicant also demonstrates that it has the qualifications (e.g., knowledge, experience, and relationships), resources, and/or partners that it needs to meet the proposal objectives.				
Project evaluation: The applicant details how it will acquire and use data to measure the effectiveness in its				

Category	Exceeds expectation	Meets expectation	Below expectation	Not addressed
services and meet reporting requirements.				
Serves rural populations: The applicant presents a strategy to meet the foreclosure prevention or community redevelopment legal needs of specific rural or frontier communities.				
Partnerships and/or subgrants: The applicant would leverage partnerships with and/or subgrants to community-based organizations or local jurisdictions.				
Number of check marks	X15 points	X10 points	X5 points	X0 points
Subtotal				
Total				

The rubric is a tool to guide Committee discussion of proposals. A comparatively high score does not guarantee funding. The Committee may still exercise discretion to make awards that best accomplish the statewide goals of this funding. This could happen, for instance, if they find that a project would provide high-quality and badly-needed services to communities—geographic or otherwise—that 2024–2025 bank grants funding would otherwise struggle to reach.

The following explanations accompany the rubric:

- **Project impact and strategies:** Applicants should explain how the project’s strategies and goals—activities, partnerships, outputs, outcomes, etc.—will directly and significantly prevent foreclosure or redevelop communities. They should explain why they selected the particular intervention(s) over others. The justification for the proposed services should refer to the circumstances and needs of particular populations that the project seeks to serve.
- **Administration:** Applicants should demonstrate their ability to implement and manage the project. Signs of strong administration include sufficient staffing, leadership, project monitoring, outreach, and resources. An applicant’s history of achieving deliverables and complying with the requirements—including deadlines—for other grants is relevant to this criterion.
- **Project evaluation:** Applicants should describe a strategy—frequency, diversity of approaches, etc.—to assess the effectiveness of project services. The project should

gather and analyze data in time to inform services strategy during the grant period. Dededicating financial and other resources to evaluation is relevant to this criterion.

- **Serves rural populations:** Applicants should describe the extent to which they would serve rural communities. The more the project would concentrate its efforts on rural populations, the more likely it will score a meets or exceeds expectations in this category.

Applicants should also detail their strategy for serving rural Californians. The strategy should consider the challenges they face—economic, geographic, political, and otherwise—to safe and reliable housing. Likewise, it should address the likely challenges to providing services. Proposals ought to explain how the project will prioritize outreach and services to rural areas rather than just affirm their eligibility.

The California Commission on Access to Justice recommends defining “rural” as areas that meet the medical service study area (MSSA) standard for “rural” or “frontier.” The California Office of Statewide Health Planning and Development identifies MSSAs using sub-county clusters of census tracts. The California Commission on Access to Justice argues that MSSA categories of rural and frontier—as opposed to urban—are better suited than counties to classify rural areas. Rural MSSAs have 50,000 or fewer residents and population densities below 250 people per square mile. “Frontier” MSSAs have population densities of fewer than 11 people per square mile.²

- **Partnerships and/or subgrants:** Applicants should describe their partnerships with and/or subgrants to community-based organizations and/or local jurisdictions. Scores in this category may reflect, among other things, the strength to the project of the partnership(s) or subgrant(s), and effectively demonstrating that these relationships may enable applicants to expand service provisions and/or populations reached. Applicants who propose strategic subgrants that enhance the project will score better than partnerships alone.

The following provide guidance for “not addressed,” “below expectations,” “meets expectations,” and “exceeds expectations”:

- **Not addressed:** A proposal that scores “not addressed” in a category/criterion fails to satisfy that criterion in a meaningful way or lacks the relevant nexus. A proposal might fail to satisfy a criterion in a meaningful way if it articulates only a vague intention to do so.
- **Below expectations:** A proposal that scores “below expectations” in a category/criterion addresses that criterion but is insufficiently competitive or persuasive to justify a score of “meets expectations.” For example, the proposal might lack sufficient detail,

² MSSA data is available on the California State Geoportal at <https://gis.data.ca.gov/datasets/CHHSAgency::medical-service-study-areas/explore?filters=eyJERUZJTklUSU90IjpbIjJ1cmFslwiRnJvbnRpZXliXX0%3D&location=36.206796%2C-118.684374%2C7.63>. This link provides data with the following filters for definition: “Rural” and “Frontier.”

explanation, or basis in fact to demonstrate its contours or likelihood of success. Since such a proposal might still articulate a feasible project, this score confers some points.

- **Meets expectations:** A proposal that scores “meets expectations” in a category/criterion is competitive and persuasive with respect to that row of the rubric. To be competitive, the proposal will be sufficiently ambitious and/or compelling to merit the use of competitive funds. To be persuasive, the proposal will describe circumstances sufficiently probative of the applicant’s intention and ability to accomplish its stated objectives in that criterion.
- **Exceeds expectations:** A proposal that scores “exceeds expectations” in a category/criterion satisfies the standard for “meets expectations” while standing out as particularly compelling or impressive. A project might be especially compelling, for instance, because its strategies would be unusually impactful. Or the proposal might be exceptionally detailed, thorough, evidence-driven, or otherwise well-conceived and convincing.

GRANTMAKING TIMELINE

The Committee has approved the following timeline for making 2024–2025 bank grant awards:

Table 1: 2024–2025 Bank Grant Timeline

Date(s)*	Activity
July 28, 2023	Committee approves the timeline, RFP, scoring rubric, and reporting requirements
August 2, 2023	Staff releases the application
August 30, 2023	Applications are due
September 11, 2023	Committee advises the scoring team/calibrates the rubric
September 12-October 13, 2023	Commissioner-staff team scores applications
October 27, 2023	Committee recommends awards
November 9, 2023	LSTFC approves awards
January 1, 2024	Grant period starts

*Some dates are approximate to accommodate applicant, commissioner, and staff availability and needs.

THE APPLICATION

A complete 2024–2025 bank grants application will include the components below. Please see the application instructions for detailed guidance.

1. **Project Profile**

The project profile will include high-level information about the project such as its award request, other funding (if any), and abstract.

2. **Project Description**

The project description will include detailed information about the project. This includes, for instance, the project's need, clients, partnerships/subgrants, goals, activities, deliverables, and strategies for outreach, accessibility, and evaluation. It will also ask for detailed narratives about the applicant's qualifications and resources to perform the work effectively.

3. Project Budget

The budget will include information on how the applicant proposes to allocate 2024-2025 bank grant funds to the project for two years. Applicants will need to identify staff by their role (e.g., "Managing attorney" or "Legal assistant") and estimate the amount of time that these roles would spend on the project. The project staff, budget, and description should be consistent with one another.

4. Budget Narrative

The budget narrative will include information about each line of the budget, noting whether the grant will directly pay for specific items or be allocated on a percentage or other basis.

5. Project Assurances

The application will include project assurances applicants must acknowledge.

REPORTING REQUIREMENTS

Grantees must report quantitative and qualitative data describing their clients and activities. Additionally, they must agree to provide any additional information required by Bank of America and Citi, their settlement monitors, regulators, or the State Bar. As such, some requirements might become known to the State Bar at a later date.

Reporting requirements will include:

1. Annual evaluations

Grantees will submit annual evaluations about outputs and outcomes such as:

- A. Expense Reports: Compare expenditures to the approved budget. Grantees will have to report budget variances exceeding 10 percent to the State Bar as soon as possible.
- B. Services Reports: Annual reports will include data on:
 - i. Main benefits for all cases according to those codes and definitions in the *California Legal Aid Reporting Handbook*.
 - ii. (To the extent possible) Economic benefits for cases that resulted in an award for or savings to the client.
 - iii. For foreclosure prevention legal assistance: total individual served (and how many served were seniors, children, and veterans), and how many foreclosures were prevented.
 - iv. For community redevelopment legal assistance: total individuals,

- nonprofits, and small businesses benefited from these services.
- v. Evaluation of whether project deliverables were met, changes made to work plans, materials produced, and evaluation tools and reports.
- vi. Whether there were unanticipated results, and whether the project helped identify areas of particular need.
- vii. Community impact and response to the services provided.
- viii. (For support centers only) Quantitative and qualitative data about trainings, convenings, research, and other support for qualified legal services projects (QLSPs).
- ix. Any other data necessary to comply with state or settlement reporting requirements.

2. **A Final Evaluation**

Grantees will submit a final evaluation about outputs and outcomes such as:

- A. Service population: How did this project help the people it served? What changed for them, or what negative outcomes were prevented?
- B. Community impact: Describe whether and how this project has helped the community it serves.
- C. Evaluation/Assessment: Describe the processes used to assess the effectiveness of this project and any lessons learned regarding the project itself or the community it serves.
- D. Reports: Upload any report completed regarding the evaluation or assessment of this project or demonstrating the effect of services rendered (e.g., client satisfaction survey results, pre and post test results, number of cases in which stipulations were reached, number of trials, outcome of trials, etc.).
- E. Other impacts: Will this project have any immediate or long-term impacts that are not already captured in main benefits reporting?
- F. Continuation of the project: Describe any plans to continue the project after the grant period.
- G. Publications: Describe any future publication or distribution plans for materials resulting from grant activities; provide the URL for online resources related to this project (web sites, resource libraries, etc.).
- H. Impact work and materials:
 - Overview of impact litigation cases: For any grant-funded impact cases your organization litigated as part of this project during the grant period, whether open or closed, report the case name, number of individuals estimated to be impacted, date filed, venue, and any partners or co-counsel also participating.

- Overview of public policy advocacy activities: Describe any grant-funded public policy advocacy activities, such as regulatory advocacy, your organization engaged in during the grant period.
- Training and support activities: Describe any grant-funded training or other support activities not identified above. For support centers, use this space to provide qualitative data about trainings, convenings, research, and other support for QLSPs.

FOR QUESTIONS

For questions about the 2024 – 2025 bank grants, please contact Jennifer Zelnick, Senior Program Analyst, at (213) 765-1210 or jennifer.zelnick@calbar.ca.gov.



Eligibility Category: LSP

Late Submission: ☐ Yes

Grant Year: 2024

Due Date: 08/30/2023

Prepared by: Jenna MacRae

Email: jmacrae@elaca.org

Contact Phone: 858-565-1392

Funding Opportunity: **Bank Grant RFP**

Project Title: **Financial Abuse Foreclosure Prevention**

Program Name: **Elder Law & Advocacy**

Applicant Title: **Director of Fund and Program Development**

Address: **5151 Murphy Canyon Road Suite 100**

City: **San Diego**

☒ 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 RFP for this funding opportunity.

FORM A - PROJECT PROFILE

1. Lead Project Contact: Jaime Levine

Job Title: Executive Director

Email: jlevine@elaca.org

Telephone: 858-565-1392

County(ies) Served by
this Project

Imperial

San Diego



3. Grant Period

January 1, 2024 – December 31, 2025

4. Total Amount Requested

There is no minimum amount of funding that projects may request. The maximum that an applicant may request is determined by the total number of partnerships and/or subgrants involved in the project. Each project must consist of one QLSP or support center applying for the 2024—2025 bank grant and at least one partnership and/or subgrant:

- 2 organizations: \$250,000 per year for a total of \$500,000 over two years;
- 3 organizations: \$300,000 per year/ total of \$600,000 over two years
- 4 organizations: \$375,000 per year/ total of \$750,000 over two years; and
- 5 or more organizations: \$450,000 per year/ \$900,000 over two years.

\$266,530.00

5. Is the project currently operating under other funding sources, including other State Bar funding?

☒ Yes ☐ No



5a. If yes, please describe how the project is funded now and whether this grant would protect or expand existing services.

Elder Law & Advocacy (EL&A) currently provides legal services to victims of financial abuse in San Diego and Imperial Counties through its Senior Legal Services programs and Elder Abuse Representation Project. This project will increase the impact that EL&A has in educating, assisting, and advocating for older adult victims at risk of foreclosure. EL&A's existing programs will remain separate from this project.

California Low Income Consumer Coalition (CLICC) currently provides policy advocacy on behalf of low-income Californians. Separately, CLICC is working on language for the state budget that would provide additional resources to offer redress to the victims of PACE (and other dubious renewable energy programs that operate through door-to-door contractor sales).

This project would allow CLICC to increase efforts of advocacy through additional staff and advocacy time including:

- SB 278, a CLICC-sponsored bill, was made a "two-year bill" in 2023. In preparation for a more effective and better resourced effort in 2024, CLICC is helping to plan and will participate in a series of stakeholder meetings on the topic.
- Voice indigent homeowners' concerns in litigation by submitting amicus briefs
- CLICC would like to conduct thoroughgoing research into operational means (successfully and unsuccessfully) used by financial institutions to prevent and combat elder financial abuse. In order to (1) conduct additional research; (2) develop educational materials; (3) manage the stakeholder process; and (4) draft and prepare the bill text and analysis to be used in 2024, CLICC will require additional resources.



6. Project Abstract

Briefly describe the core aspects of the proposed project. This abstract will be included in summaries provided to the Legal Services Trust Fund Commission, Judicial Council of California, Legislature, and others.

Elder Law & Advocacy (EL&A) has served older adults since 1978. This project will screen and provide legal services to victimized seniors in San Diego and Imperial Counties who are at risk of losing their housing due to financial abuse, provide education to seniors and community partners to prevent victimization, and provide policy and legislative advocacy to protect those most vulnerable.

The lead attorney will screen clients to determine if their situation has placed them at risk of foreclosure. Eligible clients will receive legal assistance to minimize the harm done by scams and fraud. The lead attorney will provide advice and counsel, extensive legal assistance, or representation in litigation, as appropriate.

Program staff will also lead events to educate the public about scams, predatory lending, and resources for survivors of financial abuse. Program staff will further collaborate with local law enforcement, including the District Attorney, on policy solutions.

Finally, a formal partnership with the California Low Income Consumer Coalition (CLICC) will enable effective policy advocacy on issues related to protecting seniors at risk of foreclosure. It will facilitate not just using existing law, but rather changing the law to prevent financial abuse before it occurs and to ameliorate its harms. Current examples of CLICC's advocacy in the area include sponsoring a Property Assessed Clean Energy restitution fund to relieve homeowners defrauded into taking out predatory loans; Assembly Bill 1414, which will substantially rework debt collection litigation; and Senate Bill 278, which will clarify liability for financial abuse.

Form B - Project Description

Eligibility to apply for a 2024-2025 bank grant is restricted to qualified legal services projects (QLSPs) or support centers as defined in Business and Professions Code section 6213. Applicants must have received an IOLTA grant from the LSTFC for 2023. Projects must provide legal assistance in either foreclosure prevention or community redevelopment as defined in the RFP. Projects must include a minimum of one partnership or subgrant. Partners and subgrant recipients need not be current QLSPs or support centers and may also be community-based organizations or local jurisdictions.



1. Statement of Need

Describe the need that the project seeks to address and that satisfies the statutory parameters in the above note.

In July 2021, the CFPB reported that over 900,000 adults aged 65+, especially people of color and low-income earners, were either behind on mortgage payments or facing default within the next month. These older adults generally live with 3+ household members, often including minors. Thus, foreclosure hurts not only the elderly, but also society more broadly.

Consumers face a huge disparity in policy advocacy resources. For example, this past year financial institutions brought over two dozen lobbyists and attorneys to stall SB278 because the bill would increase their liability for ignoring fraud. Similarly, in 2022 financial industry lobbyists successfully defeated SB1323, which would have required lenders to attempt to sell a house in foreclosure on the open market so that homeowners would not lose their equity in a contrived insider-only auction sale.

When an effective bill passes, the same industry lobbies sue to preemptively challenge the bill's constitutionality. The Attorney General's office defends challenged bills. EL&A and CLICC have the expertise needed to provide counsel, amicus briefs, and other support.

EL&A continues to see fraudulent solar panel cases and mortgage-related scams. Victims come to EL&A often unable to find assistance elsewhere. Scams have worsened as fraudsters adapt to new technology, and the urgency of the climate crisis brings new renewable home energy programs that lack basic consumer protections. Without legal changes to protect consumers, more seniors will fall prey to abuse and lose their homes.

2. Target Population(s)

Target Population(s): Describe the population(s) that your project is designed to help. For support centers, this can be through providing services to qualified legal service projects. Describe all that apply. You may describe a single target population (e.g., you might describe "Californians who are already homeless" and "veterans" if your project would target veterans who are already experiencing homelessness), and/or multiple separate populations (e.g., you might describe "refugees" and "people with a disability" as distinctive populations served by your proposed project).

The target population for this project is potential victims of financial elder abuse (aged 65+) who are at risk of foreclosure due to the financial instability caused by scams, mortgage fraud, and other elder financial abuse.



3. Organizational Capacity

Describe the qualifications, experiences, and resources that the organization(s) will use to accomplish the proposal objectives.

EL&A has served seniors for over 45 years. The community sees EL&A as an expert and frequently asks staff to present about elder abuse and fraud. EL&A serves elder abuse victims in numerous ways: (1) assists victims with Elder Abuse Restraining Orders and financial abuse litigation; (2) partners with Imperial County Superior Court to run a restraining order clinic; (3) represents neglected nursing home residents in court; (4) provides Medicare counseling, including preventing and recovering from Medicare fraud; and, especially, (5) advises seniors about foreclosure, mortgage, lending, and other contract disputes. In 2017, EL&A received a Bank Grant for a Mortgage Foreclosure Prevention and Assistance for Seniors project. In January 2020, EL&A joined another grant to help homeowners at risk of foreclosure due to predatory lending.

CLICC is a coalition of California QLSPs. Each year, members develop consumer protection policy initiatives to run in the state legislature. The coalition's Director has over a dozen years' experience in the Capitol and several significant legislative victories like the Nonmortgage Debt Foreclosure Prevention Act (AB 2463). CLICC's contract lobbyist has similarly extensive experience and legislative victories and has other consumer-centered clients like the National Consumer Law Center. CLICC achievements include successfully combatting foreclosures and fraud from the Property Assessed Clean Energy (PACE) program. CLICC members collaborate on litigation, consumer education programs, letters to legislators, regulatory comments, and amicus briefs. Many members have special expertise on senior issues, including EL&A, Legal Assistance for Seniors, Bet Tzedek, and Open Door Legal.



4. Project Administration

Describe the project structure including the staffing structure, supervision, if applicable, delegation of responsibility between organizations, use of volunteers, etc.

The project will be staffed by EL&A's civil elder abuse litigator and a supervising attorney (the Executive Director). Direct casework, community education, coordination with CLICC, and management of the project will be handled by the project attorney. Legal volunteers will provide case support under the supervision of the project attorney. Staff and case oversight of the project will be handled by the Executive Director. Intake tasks will be performed by a program assistant. Legal volunteers will be recruited and trained to assist the project attorney as needed.

The project attorney and the Executive Director will meet regularly during the project years with CLICC to review project operations and evaluation results, to ensure high quality services, and to calibrate legislative initiatives to fit the ongoing needs of senior clients. Clients may be involved in developing policy ideas, meeting with legislators, and testifying in committees, as they often are with CLICC's bills.

CLICC's Director will collaborate with the project attorney on policy goals and needs. The project attorney will coordinate with the Director and CLICC's contract lobbyist to address legislative meetings, planning, and hearing testimony. The project attorney will discuss policy opportunities such as regulatory comments and amicus briefs with CLICC members.



5. Project Goals and Deliverables

List the project's key goals and deliverables and describe how the project's goals will be met. Quantify where possible.

Activity 1: Foreclosure prevention legal services - extended intervention on behalf of older adult homeowners at risk of foreclosure.

Key Goal(s): Prevent foreclosure, or mitigate the effects of financial abuse for older adult victims

Deliverables: Screen approximately 24 clients each Grant Year and Provide in-depth legal assistance to approximately 9 clients during each Grant Year.

Activity 2: Financial Abuse education - community education presentations to older adults or Community Based Organizations, focusing on financial abuse and foreclosure prevention.

Key Goals: Promote awareness by older adult adults, and community groups which serve the target population, of scams, fraud, and financial abuse that can lead to foreclosure vulnerability.

Deliverables: Conduct 8 presentations during each Grant Year

Activity 3: Education Library – Creation of an education library including self-help resources and informational materials tailored to the needs of our clients.

Key Goals: Promote education of older adult homeowners. Provide materials necessary to quickly resolve and prevent financial abuse issues leading to foreclosure.

Deliverables: Create or update 2 resources during each Grant Year

Activity 4: Policy Advocacy – Advocate for seniors at risk of foreclosure in legislative, administrative, and judicial fora.

Key Goals: Advance legislative measures to protect older adults through bill sponsorship and support. Voice indigent homeowners' concerns.

Deliverables: Support or sponsor at least one legislative initiative aimed at reducing elder financial abuse in order to prevent foreclosure. Plan and participate in quarterly stakeholder meetings on the SB 278. Research operational means used by financial institutions to prevent and combat elder financial abuse.

Organization	Type	Contact Name	Job Title	Email	Telephone	Is this organization a State Bar grant recipient?	Will you subgrant to this organization?	Approx. Date the partnership began
CLICC	Other Nonprofit Corporation	Ted Mermin	Director	ted.mermin@lowincomeconsumers.org	(510) 643-3519	No	Yes	01/01/2018



6.a Partnerships and Subgrantees

Describe the nature of your partnership for every organization in the Collaborations table, above. Also describe the work they would do on this particular project. Provide quantitative goals where possible. For subgrantees in particular, describe how you will monitor their work to ensure accurate reporting and grant compliance. The amount of information that you provide affects the competitiveness of your proposal.

EL&A has been a member of CLICC for over 5 years. CLICC will support legislation to prevent elder financial abuse and to provide relief to victims of elder financial abuse, such as creating a PACE restitution fund. Through its network of litigators and stakeholders throughout California, CLICC will identify situations affecting seniors at risk of foreclosure to facilitate the project attorney's policy advocacy work, including meetings/hearings with legislators, regulatory comments, and amicus briefs. The project attorney will meet with CLICC weekly to discuss progress under the grant initiatives.

7. Will this project address foreclosure prevention or community redevelopment in rural communities?

For the purposes of this grant "rural" is defined as areas that meet the definition of "rural" or "frontier" that the medical community uses to analyze the availability of medical services. This classification scheme is known as Medical Service Study Areas (MSSAs). Rural MSSAs have 50,000 or fewer residents and population densities below 250 people per square mile, while "frontier" MSSAs are defined by population densities of fewer than 11 people per square mile.

Click on the View Map button to help identify rural areas in narrative response below.

- ☒ Yes'
- ☐ No'



7.a. If yes, identify the rural communities and specify how the project will address foreclosure prevention or community redevelopment.

EL&A'S direct legal services and community education will be focused on Imperial and San Diego Counties.

Imperial County is a rural and frontier region (MSSA-Medical Service Study Areas, California.) It is in the southernmost part of California, bordering Mexico and Arizona. Imperial County residents live in a geographically large region but have little access to low-cost or free legal services. Few nonprofit legal-aid organizations operate in this large county, making a program like this one a critical resource for the county's low-income older residents. Cities and census-designated places include: Brawley, Calexico, Calipatria, El Centro, Holtville, Imperial, Westmorland, Bombay Beach, Desert Shores, Heber, Niland, Ocotillo, Pala Verde, Salton City, Salton City Beach, Seeley and Winterhaven.

Portions of San Diego County are rural and frontier regions (MSSA-Medical Service Study Areas, California). Cities and census-designated places include: Pala, Pauma Valley, Rincon, San Pasqual, Valley Center, Ramona, Rock Haven, Rosemont, Alpine, Blossom Valley, Crest, Descanso, Glen Oaks, Harbison Canyon, Japatul, Palo Verde, Buckman Springs, Canyon City, Jacumba, Morena Village, Tecate, Dulzura, Engineer Springs, Indian Springs, Jamacha, Jamul, Barona, Moreno, Borrego Springs, Cuyamaca, Julian, Kentwood in the Pines, Laguna, Ocotillo Wells, Palomar, Pine Valley, and Warner Springs.

The legislative advocacy provided by EL&A and CLICC, will focus on the entire State of California.

Proposed Activities		Proposed Activities	
Quarter	Responsible Partner	Activity	Deliverables
2024			



Q1 January-
March

Elder Law &
Advocacy
and/or CLICC

Activity 1
(EL&A): legal
services

Activity 1: Screen 6 and accept 2
clients for project participation.

Activity 2: Conduct 2 presentations

Activity 2
(EL&A):
Financial
abuse
Education

Activity 3: Begin to develop education
resources

Activity 3
(EL&A):
Education
Library

Activity 4: Plan and/or participate in
quarterly stakeholder meetings.
Identify one legislative initiative to
provide policy advocacy.

Activity 4
(CLICC &
EL&A): Policy
Advocacy

Q2 April-June&

Elder Law &
Advocacy
and/or CLICC

Activity 1
(EL&A): legal
services

Activity 1: Screen 6 and accept 2
clients for project participation.

Activity 2: Conduct 2 presentations

Activity 2
(EL&A):
Financial
abuse
Education

Activity 3: Continue to develop
education resources

Activity 3
(EL&A):
Education
Library

Activity 4: Plan and/or participate in
quarterly stakeholder meetings.
Continue to provide policy advocacy.

Activity 4
(CLICC &
EL&A): Policy
Advocacy



Q3 July-
September

Elder Law &
Advocacy
and/or CLICC

Activity 1
(EL&A): legal
services

Activity 1: Screen 6 and accept 2
clients for project participation.

Activity 2: Conduct 2 presentations

Activity 2
(EL&A):
Financial
abuse
Education

Activity 3: Continue to develop
education resources

Activity 3
(EL&A):
Education
Library

Activity 4: Plan and/or participate in
quarterly stakeholder meetings.
Continue to provide policy advocacy.

Activity 4
(CLICC &
EL&A): Policy
Advocacy

Q4 October-
December

Elder Law &
Advocacy
and/or CLICC

Activity 1
(EL&A): legal
services

Activity 1: Screen 6 and accept 2
clients for project participation.

Activity 2: Conduct 2 presentations

Activity 2
(EL&A):
Financial
abuse
Education

Activity 3: Complete 2 education
resources

Activity 3
(EL&A):
Education
Library

Activity 4: Plan and/or participate in
quarterly stakeholder meetings.
Continue to provide policy advocacy.

Activity 4
(CLICC &
EL&A): Policy
Advocacy

2025



Q1 January-
March

Elder Law &
Advocacy
and/or CLICC

Activity 1
(EL&A): legal
services

Activity 1: Screen 6 and accept 2
clients for project participation.

Activity 2: Conduct 2 presentations

Activity 2
(EL&A):
Financial
abuse
Education

Activity 3: Begin to develop or update
education resources

Activity 3
(EL&A):
Education
Library

Activity 4: Plan and/or participate in
quarterly stakeholder meetings.
Continue to provide policy advocacy.

Activity 4
(CLICC &
EL&A): Policy
Advocacy

Q2 April-June&

Elder Law &
Advocacy
and/or CLICC

Activity 1
(EL&A): legal
services

Activity 1: Screen 6 and accept 2
clients for project participation.

Activity 2: Conduct 2 presentations

Activity 2
(EL&A):
Financial
abuse
Education

Activity 3: Continue to develop
education resources

Activity 3
(EL&A):
Education
Library

Activity 4: Plan and/or participate in
quarterly stakeholder meetings.
Continue to provide policy advocacy.

Activity 4
(CLICC &
EL&A): Policy
Advocacy



Q3 July-
September

Elder Law &
Advocacy
and/or CLICC

Activity 1
(EL&A): legal
services

Activity 1: Screen 6 and accept 2
clients for project participation.

Activity 2: Conduct 2 presentations

Activity 2
(EL&A):
Financial
abuse
Education

Activity 3: Continue to develop
education resources

Activity 3
(EL&A):
Education
Library

Activity 4: Plan and/or participate in
quarterly stakeholder meetings.
Continue to provide policy advocacy.

Activity 4
(CLICC &
EL&A): Policy
Advocacy

Q4 October-
December

Elder Law &
Advocacy
and/or CLICC

Activity 1
(EL&A): legal
services

Activity 1: Screen 6 and accept 3
clients for project participation.

Activity 2: Conduct 2 presentations

Activity 2
(EL&A):
Financial
abuse
Education

Activity 3: Complete 2 education
resources

Activity 3
(EL&A):
Education
Library

Activity 4: Plan and/or participate in
quarterly stakeholder meetings.
Continue to provide policy advocacy.

Activity 4
(CLICC &
EL&A): Policy
Advocacy



Enter your proposed budget for the entire grant period in the worksheet below. The total in this table should match the total amount requested in Form A.

Round to the nearest two decimals for the full-time equivalent (FTE) personnel table.

Personnel

Personnel	Proposed Budget	Narrative
1. Attorneys	\$107,144	Includes .5 FTE Project Attorneys for both Year 1 and Year 2 and .05 FTE Executive Director/Supervising Attorney for both Year 1 and Year 2.
2. Paralegals	\$0	
3. Other Staff	\$0	
SUBTOTAL	\$107,144	
4. Employee Benefits	\$17,574	Estimated payroll taxes, workers comp premiums, and health benefits for the attorneys listed above.
TOTAL PERSONNEL	\$124,718	

Non-Personnel

Non-Personnel	Proposed Budget	Narrative
5. Space	\$4,164	Includes rent and utilities based on the estimated allocation of the project's FTE vs Organization-wide FTE (approximately 2-3%), for both Year 1 and Year 2.
6. Equipment Rental and Maintenance	\$0	
7. Office Supplies	\$0	
8. Printing and Postage	\$0	
9. Telecommunications	\$957	Includes cloud-based telephone system, fax lines, and internet charges based on the allocation of the project's estimated FTE vs Organization-wide FTE. (approximately 2-3%), for both Year 1 and Year 2.
10. Technology	\$0	
11. Program Travel	\$7,581	Includes travel costs for attorneys, including several trips to Sacramento in both Year 1 and Year 2.
12. Training	\$0	
13. Library	\$5,702	Includes the purchase of an online legal research tool for litigation purpose in both Year 1 and Year 2
14. Insurance	\$0	



15. Litigation	\$60,000	Includes litigation costs (records requests, expert review, deposition transcripts, filings fees, mediation) for at least two cases per year in both Year 1 and Year 2, that would settle out of court.
16. Capital Additions	\$0	
17. Contract Service to Clients	\$0	
18. Evaluation	\$0	
19. Other	\$720	Includes membership fees of 660 based on the allocation of the project's estimated FTE vs Organization-wide FTE. (approximately 2-3%) in both Year 1 and Year 2, and purchase of a software tool license for the Project attorney of approximately \$60.
TOTAL NON-PERSONNEL	\$79,124	
Administrative	Proposed Budget	Narrative
20. Personnel	\$2,538	Includes Administrative costs including accounting, human resources, and general management salary and wages based on the allocation of the project's estimated FTE vs Organization-wide FTE (approximately 2- 3%), for both Year 1 and Year 2.
21. Non-Personnel	\$10,150	Includes insurance (liability, professional liability, property, D&O, Cyber, etc.) premiums, audit costs, contract services, and other non-personnel related costs for accounting and human resources based on the allocation of the project's estimated FTE vs Organization-wide FTE (approximately 2-3%) for both Year 1 and Year 2.
TOTAL ADMINISTRATIVE	\$12,688	
22. Total Subgrants	\$50,000	
GRAND TOTAL	\$266,530	

1. Lawyers

Title/Position	FTEs
Project Attorney	0.5
Executive Director/Supervising Attorney	0.05
	0
Total Lawyers	0.55

2. Paralegals

Title/Position	FTEs
	0.00



	0.00
Total Paralegals	0.00
3. Other Staff	
Title/Position	FTEs
	0.00
	0.00
	0.00
	0.00
	0.00
Total Other Staff	0.00
TOTAL PERSONNEL (in FTEs)	0.55

Subgrants		
Partner Organization	Amount	Describe Proposed Expenses
CLICC	50000	In order to provide the additional policy related services outlined in the proposal, and to also provide amicus brief and regulatory comment support, CLICC will need to increase the capacity of its contract and in-house policy advocacy teams. \$25,000 per year for two years will cover the increase in advocate time, both at CLICC itself and at its contract policy advocacy firm. With that amount, CLICC will be able to hire someone part-time and also to pay for additional time from its contract advocacy firm.
Total:		50000

% Personnel: 66.51%

% Non-Personnel: 33.49%

3. If the proposed budget allocates less than 75 percent to personnel, explain why it deviates from the recommended percentages.

For this particular project, there are two line items in the non-personnel area that are substantial costs of the project. We are budgeting for litigations costs of \$30,000 per year and the participation of a sub-grantee at \$25,000 per year. These are non-personnel costs that are nevertheless important to the project's success.



% Program: 95.24%

% Admin: 4.76%

4. If the proposed budget allocates less than 75 percent to program, explain why it deviates from the recommended percentages.

Form D - Project Assurances'

Download the Assurances document and upload a signed copy below.

Upload PDF Version of
Signed Assurances
Document:

2216_001.pdf
88 KB - 08/25/2023 1:51PM

Total Files: 1

Supporting Documents (Optional)

When naming optional supporting documents, please include the Organization's acronym (or short name) and a one- to five-word file description (note: any type of file may be uploaded).

Audit Extension ☐ Yes
Requested:



Eligibility Category: LSP

Late Submission: ☐ Yes

Grant Year: 2024

Due Date: 08/30/2023

Prepared by: Erin Scott

Email: escott@fvlc.org

Contact Phone: 510-208-0220

Funding Opportunity: **Bank Grant RFP**

Project Title: **Housing for Survivors**

Program Name: **Family Violence Law Center**

Applicant Title: **Executive Director**

Address: **470 27th Street**

City: **Oakland**

☒ 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 RFP for this funding opportunity.

FORM A - PROJECT PROFILE

1. Lead Project Contact: Tunisia Owens

Job Title: Policy & Advocacy Manager

Email: towens@fvlc.org

Telephone: 800-947-8301

County(ies) Served by
this Project

3. Grant Period

January 1, 2024 – December 31, 2025



4. Total Amount Requested

There is no minimum amount of funding that projects may request. The maximum that an applicant may request is determined by the total number of partnerships and/or subgrants involved in the project. Each project must consist of one QLSP or support center applying for the 2024—2025 bank grant and at least one partnership and/or subgrant:

- 2 organizations: \$250,000 per year for a total of \$500,000 over two years;
- 3 organizations: \$300,000 per year/ total of \$600,000 over two years
- 4 organizations: \$375,000 per year/ total of \$750,000 over two years; and
- 5 or more organizations: \$450,000 per year/ \$900,000 over two years.

\$500,000.00

5. Is the project currently operating under other funding sources, including other State Bar funding?

☐ Yes ☒ No



6. Project Abstract

Briefly describe the core aspects of the proposed project. This abstract will be included in summaries provided to the Legal Services Trust Fund Commission, Judicial Council of California, Legislature, and others.

Family Violence Law Center helps diverse communities heal from domestic violence and sexual assault with free legal and crisis support services, prevention education and leadership development (culture change), and policy and advocacy work (systems change). Each core program area operates to jointly address individual and institutional barriers for survivors with the goal of helping families and communities achieve increased safety and economic security. Domestic violence and sexual assault can impact all aspects of survivors' lives, from health to their housing and employment, and therefore the range of possible advocacy issues is broad. FVLC's community redevelopment work begins with prioritizing survivor agency and recognizes that maintaining safe and stable housing, including combatting displacement and preservation of affordable housing, is the foundation of economic security for the survivors we serve. Our proposed project for community redevelopment aims to promote healthy communities and prevent homelessness by addressing the Violence Against Women Act (VAWA), which was reauthorized in 2022 with enhanced protections and access points for survivors. Our proposal takes a three-pronged approach to addressing housing rights implementation under VAWA: (1) Survivor education and training via a Know Your Legal Rights campaign, with leveraged legal service referrals to partners as needed; (2) Advocacy, technical assistance and training within our local Continuum of Care (CoC) for VAWA compliance; and (3) State administrative and legislative advocacy related to SB 357 for exit services including housing for trafficking survivors who may be eligible for VAWA housing supports.

Form B - Project Description

Eligibility to apply for a 2024-2025 bank grant is restricted to qualified legal services projects (QLSPs) or support centers as defined in Business and Professions Code section 6213. Applicants must have received an IOLTA grant from the LSTFC for 2023. Projects must provide legal assistance in either foreclosure prevention or community redevelopment as defined in the RFP. Projects must include a minimum of one partnership or subgrant. Partners and subgrant recipients need not be current QLSPs or support centers and may also be community-based organizations or local jurisdictions.



1. Statement of Need

Describe the need that the project seeks to address and that satisfies the statutory parameters in the above note.

The Violence Against Women Reauthorization Act (VAWA) acknowledges that domestic violence and sexual assault survivors and their families are often discriminated against, denied access to and evicted from housing because of the acts of domestic and sexual violence committed against them. Domestic violence is a leading cause of homelessness for survivors and their families, and because of gender-based violence's connections with homelessness and therefore poverty, women and children were disproportionately impacted by the economic consequences of the pandemic, further fueling the housing insecurity of domestic violence survivors, a vast majority of whom are women who experience pay inequity and poverty at significantly higher rates. While domestic and dating violence and sexual assault impact communities across every economic and racial line, BIPOC and low-income survivors are more likely to experience barriers to accessing services, healing, and achieving safety and stability, and barriers increase for survivors who are both low-income and BIPOC. (See reports and fact sheets produced by the Women of Color Network, located at <https://wocninc.org/publications/>.) Our work with survivors has shown us how personal safety, food and housing insecurity intimately relate to social determinants of health, and maintaining affordable rental housing for survivors is crucial to enabling them to successfully escape. Our three-pronged approach will empower low-income communities to self-advocate, will ensure localities and landlords understand and meet their obligations under VAWA, and will advocate for legislative solutions to housing displacement.



2. Target Population(s)

Target Population(s): Describe the population(s) that your project is designed to help. For support centers, this can be through providing services to qualified legal service projects. Describe all that apply. You may describe a single target population (e.g., you might describe “Californians who are already homeless” and “veterans” if your project would target veterans who are already experiencing homelessness), and/or multiple separate populations (e.g., you might describe “refugees” and “people with a disability” as distinctive populations served by your proposed project).

This project is designed to help populations at high risk of gender-based violence and housing insecurity, including adult females, women of color, persons with disabilities, pregnant or postpartum women, LGBTQ+ residents, immigrants, and those in high poverty neighborhoods or who were exposed to domestic violence as children. 58% of low-income U.S. households are headed by single women and the rate of domestic violence for women is 3 times higher for the lowest income quartile versus the highest. (See justicegap.lsc.gov.) In Alameda County, 65% of DV deaths from 2006-2016 were residents aged 18-44, and DV deaths to African Americans (45%) were overrepresented relative to their proportion of the county population (12%). (See ACPHD Domestic Violence Slide Set, June 2018.) This project will help low-income, BIPOC survivors of domestic violence, sexual assault and trafficking in Alameda County. FVLC serves all of Alameda County and is located near downtown Oakland at the Alameda County Family Justice Center, which serves as a central access point. In FY 22-23, FVLC served 2,053 survivors and their children, most of whom were low-income women of color; in FY 22-23, our clients were: 93% women; 92% below 250% Federal Poverty Threshold; 86% people of color (33% Latino, 31% African-American, 10% Asian/Pacific Islander, 1% Native American, 15% Biracial/Other); 38% female HOH; 16% immigrants, 14% limited English proficiency, and 12% disabled. FVLC seeks to strengthen these communities by incorporating housing stabilization, economic literacy, and community development into our policy program.



3. Organizational Capacity

Describe the qualifications, experiences, and resources that the organization(s) will use to accomplish the proposal objectives.

FVLC has a proven track record of improving community well-being through legal and supportive services and community organizing and advocacy, changing systems from within to stabilize communities. We have gained unprecedented community access and organizing momentum based on the understanding we can use staff expertise gained working directly with survivors to inform community redevelopment. FVLC has extensive experience organizing and working with other DV, sexual assault, and human trafficking providers to utilize policy tools for improving systems. FVLC's policy staff serves on the Leadership Board of the Alameda County CoC, on the Racial Equity Committee of the CoC, and the Point-in-Time (PIT) Count Team in efforts to engage with the homeless services system and improve integration of survivor services. FVLC convenes the Gender Based Violence Provider Coalition of Alameda County in collective advocacy work to improve survivor outcomes and leads the Gender Based Violence subcommittee of the City of Oakland's Violence Prevention Coalition. FVLC's on-the-ground perspective and leadership in advocacy efforts at multiple levels of governance provides the balanced approach necessary to accomplish project goals. Finally, FVLC incorporates the voices of survivors into all that we do, with 82% of staff identifying as a survivor and 95% identifying as a close friend or family member of a survivor. We are uniquely positioned to understand and effectively address the logistical and institutional barriers facing survivors and families impacted by violence as they engage in systems which are designed to heal, but which often inflict more harm.



4. Project Administration

Describe the project structure including the staffing structure, supervision, if applicable, delegation of responsibility between organizations, use of volunteers, etc.

Erin Scott, Esq., FVLC's Executive Director, will oversee program compliance, evaluation and growth. Erin has 20+ years' experience as a survivor advocate, 15+ years' experience in public interest law, and 10+ years' experience in nonprofit management, and has a J.D. from NYU School of Law and a B.A. from Swarthmore College. Tunisia Owens, J.D., MPA-URP, FVLC's Policy and Advocacy Manager, will direct and implement the program, including strategies for community development and systems change advocacy. Tunisia graduated from Spelman College with a degree in Political Science and Economics, holds a joint Master's from Princeton University in Public Policy and Urban/Regional Planning, and obtained her J.D. from U.C. Hastings College of the Law.

For this project, FVLC will hire a full-time Policy Advocate with experience in housing/homelessness policy at the federal, state, or local level. FVLC will seek an advocate with experience serving at a domestic violence, sexual assault, or human trafficking organization to provide context for understanding how vital housing resources are to survivors, and with the ability to read complex legal documents and legislative materials and transform them into manageable information for a lay audience, including creating social media outreach materials, traditional media outreach, fact sheets, policy briefs, and audio-visual content. Project partner Justice At Last will join FVLC's policy team in educating trafficking survivors and service providers on VAWA housing rights and will work closely with FVLC's policy staff to implement the outreach, technical assistance and training aspects of the project.



5. Project Goals and Deliverables

List the project's key goals and deliverables and describe how the project's goals will be met. Quantify where possible.

The project's key goals include: (1) Outreach to survivors and survivor providers: Hold a minimum of 4 outreach events with survivors and survivor providers in order to conduct Know Your Rights training on new VAWA regulations in Year 1. Events will be virtual and in-person, will be available to persons with mobility challenges or disabilities, and at least one event will provide simultaneous Spanish interpretation in order to encourage broad access to the information. (2) Enact a "Know Your Housing Rights" campaign: Develop simple and easy-to-understand "Know Your VAWA Rights" collateral materials in English and Spanish for survivors in Year 1. Materials will be written for a non-legal audience in formats that are easily accessible but also discreet. Subsequent years will focus on expanding the campaign to include other languages, braille, videos, etc. (3) Develop policy recommendations: Collaborate with Justice at Last and other gender-based violence service providers to build policy recommendations for VAWA 2022 implementation in the Alameda County Continuum of Care in Year 1. Subsequent years would focus on VAWA compliance and fidelity with program goals. (4) Training and technical assistance: Develop and provide a minimum of 4 trainings on survivor housing rights under VAWA to housing stakeholders who host HUD-funded housing programs. These trainings will have a particular focus on changes to survivor housing rights in the VAWA 2022 Reauthorization. Subsequent years will focus on expanding the frequency of training and including best practice TA sessions for housing navigators and other staff working with HUD-funded programs.

Organization	Type	Contact Name	Job Title	Email	Telephone	Is this organization a State Bar grant recipient?	Will you subgrant to this organization?	Approx. Date the partnership began
Justice At Last	Other Nonprofit Corporation	Rose Muhktar	Executive Director	mailto:rose@justiceatlast.org	650-918-0719	No	Yes	01/01/2022



6.a Partnerships and Subgrantees

Describe the nature of your partnership for every organization in the Collaborations table, above. Also describe the work they would do on this particular project. Provide quantitative goals where possible. For subgrantees in particular, describe how you will monitor their work to ensure accurate reporting and grant compliance. The amount of information that you provide affects the competitiveness of your proposal.

FVLC is leading a coalition of gender-based violence activists in agencies across Alameda County, and our direct service housing team works in partnership with FVLC's policy staff to engage and educate community partners in community development. FVLC has extensive experience leading grant partnerships, monitoring subgrantee compliance, and working with community partners. FVLC currently oversees 15 subgrantees on 10 different grants and has experience conducting site visits for compliance purposes. One community partner, Justice At Last, is the only nonprofit law firm in the San Francisco Bay Area exclusively serving human trafficking survivors. Justice At Last is a mobile legal practice with satellite offices throughout the San Francisco Bay Area, meeting clients at home or where they already receive trusted services. Justice at Last is an ideal partner for this project because they have legal expertise and are skilled at legal research and advocacy, an invaluable asset for reviewing VAWA and HUD regulations to clarify the policy for both housing providers and gender-based violence service providers who also offer housing support. Justice At Last will join FVLC's policy team in educating trafficking survivors and service providers on VAWA housing rights, and will work closely with FVLC's policy staff to implement the outreach, technical assistance and training aspects of the project. As part of this project proposal, FVLC will hire an outside evaluation expert to set up an evaluation system for FVLC and JAL's work to provide us with more information about the effectiveness of our programming.

7. Will this project address foreclosure prevention or community redevelopment in rural communities?

For the purposes of this grant "rural" is defined as areas that meet the definition of "rural" or "frontier" that the medical community uses to analyze the availability of medical services. This classification scheme is known as Medical Service Study Areas (MSSAs). Rural MSSAs have 50,000 or fewer residents and population densities below 250 people per square mile, while "frontier" MSSAs are defined by population densities of fewer than 11 people per square mile.

Click on the View Map button to help identify rural areas in narrative response below.

- ☐ Yes
☒ No



Proposed Activities		Proposed Activities	
Quarter	Responsible Partner	Activity	Deliverables
2024			
Q1 January-March	FVLC/JAL	Outreach, Know Your Rights, Policy Legislative Advocacy, Training and Technical Assistance	Outreach to survivors and survivor providers, TA Session 1 for housing providers and develop "Know Your VAWA Rights" training for survivors. Identify potential evaluators for project and metrics for success.
Q2 April-June	FVLC/JAL	Outreach, Know Your Rights, Policy Legislative Advocacy, Training and Technical Assistance	TA Session 2 for housing providers, "Know Your VAWA Rights" training 1 for survivors with interpretation services and training 2 for survivor providers. Begin outreach to Continuum of Care (CoC) on VAWA changes.
Q3 July-September	FVLC/JAL	Outreach, Know Your Rights, Policy Legislative Advocacy, Training and Technical Assistance	Assess CoC compliance with VAWA 2022, TA Session 3 with housing providers, "Know Your VAWA Rights" training outreach to disabled communities and 3rd in-person training for survivors. Assess California housing policies that benefit trafficking survivors.
Q4 October-December	FVLC/JAL	Outreach, Know Your Rights, Policy Legislative Advocacy, Training and Technical Assistance	Develop CoC policy recommendations for VAWA 2022 compliance, TA Session 4 with housing providers, "Know Your VAWA Rights" training 4 with survivors providers working with immigrant communities.
2025			



Q1 January-March	FVLC/JAL	Outreach, Know Your Rights, Policy Legislative Advocacy, Training and Technical Assistance	Educate California legislators on opportunities to prevent survivors from becoming homeless. CoC outreach to deliver policy recommendations, "Know Your VAWA Rights" social media campaign launch.
Q2 April-June	FVLC/JAL	Outreach, Know Your Rights, Policy Legislative Advocacy, Training and Technical Assistance	Design a CoC implementation strategy for VAWA compliance, continue political education campaign on survivor homelessness prevention, TA Session 5 with housing providers.
Q3 July-September	FVLC/JAL	Outreach, Know Your Rights, Policy Legislative Advocacy, Training and Technical Assistance	Begin project evaluation process, continue implementing VAWA compliance within CoC, continue "Know Your VAWA Rights" campaign.
Q4 October-December			

FORM C - PROPOSED BUDGET AND NARRATIVE

Enter your proposed budget for the entire grant period in the worksheet below. The total in this table should match the total amount requested in Form A.

Round to the nearest two decimals for the full-time equivalent (FTE) personnel table.

Personnel

Personnel	Proposed Budget	Narrative
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1. Attorneys	\$182,608	1.0 Policy Advocate (J.D. preferred) to implement project activities; 0.20 FTE Policy & Advocacy Manager (J.D.) to oversee project activities and assist with implementation.
2. Paralegals	\$0	
3. Other Staff	\$5,192	0.05 Grants & Contracts Manager to assist with reporting and evaluation activities.
SUBTOTAL	\$187,800	
4. Employee Benefits	\$37,222	Employee benefits for these positions calculated at 19.82%. These costs include FICA, Medicare, Workers' Compensation, Unemployment Insurance, as well as Medical, Dental and Vision Insurance and other payroll costs.
TOTAL PERSONNEL	\$225,022	
Non-Personnel		
Non-Personnel	Proposed Budget	Narrative
5. Space	\$2,098	Funds requested to cover prorated office rent and space rental for outreach and education = \$1,000
6. Equipment Rental and Maintenance	\$0	
7. Office Supplies	\$2,176	Funds requested to cover prorated costs of office supplies based on FTE associated with the project.
8. Printing and Postage	\$1,200	Funds requested to cover printed materials for outreach and education and an evaluation report (\$168 for 100 copies as an example x 6 print runs = \$600).
9. Telecommunications	\$0	
10. Technology	\$6,096	Funds requested to cover annual Zoom webinar subscription (\$948) plus regular Zoom annual (\$200); one laptop for Policy Advocate (\$1,500) plus docking station and headphones (\$400)
11. Program Travel	\$4,404	Funds requested to cover mileage reimbursement (0.625 cents x 2,000 miles = \$1,250 + \$300 for parking = \$1,550) for travel to conduct education, outreach, and legislative advocacy locally and in Sacramento. Additional funds for education and outreach trips to Southern California (\$200 RT airfare x 2 = \$400 + \$26 parking x 2 = \$52 + ground transportation \$200 = \$652).
12. Training	\$0	



13. Library	\$1,748	Funds requested to cover estimated costs of books, reference materials, and prorated costs of subscriptions based on FTE associated with the project.
14. Insurance	\$3,000	Funds requested to cover state bar and local bar memberships and professional development.
15. Litigation	\$0	
16. Capital Additions	\$0	
17. Contract Service to Clients	\$0	
18. Evaluation	\$30,000	Funds requested to hire an evaluator to work with project staff throughout the project and produce a report so results can be shared with other organizations.
19. Other	\$6,077	Food for meetings
TOTAL NON-PERSONNEL	\$56,799	
Administrative	Proposed Budget	Narrative
20. Personnel	\$9,224	FVLC administrative personnel to cover payroll, accounts payable and accounts receivable (\$92,242 total, 10% = \$9,224). Total administrative costs based on de minimus rate of 10% of MTDC - less than that percentage requested.
21. Non-Personnel	\$4,699	Payroll service (\$10,440 total, 10% = \$1,044), IT expense (\$36,548 total - 10% = \$3,655). Total administrative costs based on de minimus rate of 10% of MTDC - less than that percentage requested.
TOTAL ADMINISTRATIVE	\$13,923	
22. Total Subgrants	\$204,256	Funds requested to partner with Justice At Last, a legal services agency serving survivors of trafficking.
GRAND TOTAL	\$500,000	

1. Lawyers

Title/Position	FTEs
FVLC Policy & Advocacy Manager (J.D.)	0.2
FVLC & JAL Policy Advocate (J.D. preferred)	2
JAL Management Positions	0.03
Total Lawyers	2.23

2. Paralegals

Title/Position	FTEs
	0.00
	0.00
Total Paralegals	0.00

**3. Other Staff**

Title/Position	FTEs
Grants & Contracts Manager	0.05
	0.00
	0.00
	0.00
	0.00
Total Other Staff	0.05
TOTAL PERSONNEL (in FTEs)	2.28

Subgrants

Partner Organization	Amount	Describe Proposed Expenses
Justice At Last	204256	Personnel costs - \$70,000 salaries, \$6,800 payroll taxes, \$10,200 employee benefits; Operating Costs - \$250 communication, \$1,500 lived experiences contract services, \$250 office & marketing supplies, \$500 rent, \$250 travel & transportation, \$250 training; Indirect - \$12,128 administrative overhead.
Total:		204256

% Personnel: 87.70%**% Non-Personnel:** 12.30%

3. If the proposed budget allocates less than 75 percent to personnel, explain why it deviates from the recommended percentages.

N/A.

% Program: 97.22%**% Admin:** 2.78%

4. If the proposed budget allocates less than 75 percent to program, explain why it deviates from the recommended percentages.

N/A.



Form D - Project Assurances

Download the Assurances document and upload a signed copy below.

Upload PDF Version of
Signed Assurances
Document:

2024_Project_Assurance_28_Family_Violence_Law_Center_(2)-
_signed.pdf
160.1 KB - 08/24/2023 6:43PM

Total Files: 1

Supporting Documents (Optional)

When naming optional supporting documents, please include the Organization's acronym (or short name) and a one- to five-word file description (note: any type of file may be uploaded).

Audit Extension ☐ Yes
Requested:



Eligibility Category: SC

Late Submission: ☐ Yes

Grant Year: 2024

Due Date: 08/30/2023

Prepared by: Philip Hwang

Email: phwang@one-justice.org

Contact Phone: 415-834-0100

Funding Opportunity: Bank Grant RFP

Project Title: Maximizing Systemic Impact of Pro Bono Legal Services

Program Name: OneJustice

Applicant Title: Chief Executive Officer

Address: 433 California Street Suite 800

City: San Francisco

☒ 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 RFP for this funding opportunity.

FORM A - PROJECT PROFILE

1. Lead Project Contact: Leigh Ferrin

Job Title: Program Director

Email: lferrin@one-justice.org

Telephone: 213-784-3937

County(ies) Served by
this Project

Alameda

Alpine

Amador

Butte



Calaveras
Colusa
Contra Costa
Del Norte
El Dorado
Fresno
Glenn
Humboldt
Imperial
Inyo
Kern
Kings
Lake
Lassen
Los Angeles
Madera
Marin
Mariposa
Mendocino
Merced
Modoc
Mono
Monterey
Napa
Nevada
Orange
Placer
Plumas
Riverside
Sacramento



San Benito
San Bernardino
San Diego
San Francisco
San Joaquin
San Luis Obispo
San Mateo
Santa Barbara
Santa Clara
Santa Cruz
Shasta
Sierra
Siskiyou
Solano
Sonoma
Stanislaus
Sutter
Tehama
Trinity
Tulare
Tuolumne
Ventura
Yolo
Yuba

3. Grant Period

January 1, 2024 – December 31, 2025



4. Total Amount Requested

There is no minimum amount of funding that projects may request. The maximum that an applicant may request is determined by the total number of partnerships and/or subgrants involved in the project. Each project must consist of one QLSP or support center applying for the 2024—2025 bank grant and at least one partnership and/or subgrant:

- 2 organizations: \$250,000 per year for a total of \$500,000 over two years;
- 3 organizations: \$300,000 per year/ total of \$600,000 over two years
- 4 organizations: \$375,000 per year/ total of \$750,000 over two years; and
- 5 or more organizations: \$450,000 per year/ \$900,000 over two years.

\$400,000.00

5. Is the project currently operating under other funding sources, including other State Bar funding?

☐ Yes ☒ No



6. Project Abstract

Briefly describe the core aspects of the proposed project. This abstract will be included in summaries provided to the Legal Services Trust Fund Commission, Judicial Council of California, Legislature, and others.

This project will increase the expertise and capacity of legal services organizations throughout California, particularly organizations serving rural communities, in utilizing pro bono volunteers to advance transformative outcomes and long-term economic security for low-income communities. OneJustice will partner on this project with the Legal Aid Association of California (LAAC).

OneJustice and LAAC will prepare a report on the current pro bono environment in California and will offer a new training program for pro bono managers and professionals at legal services organizations. The project's goals are to maximize the impact of pro bono volunteers across multiple legal issue areas and improve systemic outcomes in California's low-income communities. Organizations will receive support in: (1) using data to guide their strategic deployment of pro bono resources; (2) implementing the most promising and effective practices; and (3) tailoring their pro bono services to revitalize and stabilize low-income communities. This new training program will bring together legal aid organizations across the state, with a prioritization of organizations serving rural communities. Organizations will receive training and support over an extended period, where they will learn about and share best practices in maximizing the impact of their pro bono resources. This new training program will build on the success of OneJustice's leadership development programs, peer learning programs, and pro bono trainings and convenings. OneJustice will supplement legal services organizations' participation in the training program with individualized consulting and coaching to foster the legal services organizations' implementation of new practices and initiatives in their communities.

Form B - Project Description

Eligibility to apply for a 2024-2025 bank grant is restricted to qualified legal services projects (QLSPs) or support centers as defined in Business and Professions Code section 6213. Applicants must have received an IOLTA grant from the LSTFC for 2023. Projects must provide legal assistance in either foreclosure prevention or community redevelopment as defined in the RFP. Projects must include a minimum of one partnership or subgrant. Partners and subgrant recipients need not be current QLSPs or support centers and may also be community-based organizations or local jurisdictions.



1. Statement of Need

Describe the need that the project seeks to address and that satisfies the statutory parameters in the above note.

California's legal profession is invested in closing the justice gap, but volunteers may not know what type of work they can do to be most transformative for low-income communities, promote long-term economic security, and deepen and broaden their impact. If the focus is primarily on the number of volunteer hours required or the discrete tasks performed, these metrics of success may not fully align with community needs.

OneJustice has conducted impact evaluation projects to determine how pro bono clinics should be structured to maximize outcomes for low-income communities. For example, our evaluation of expungement pro bono clinics found that if individuals received assistance with preparing expungement petitions but did not receive detailed filing instructions, they were significantly less likely to actually file the petitions and expunge their records. How pro bono clinics are designed is critical if the goal is to improve systemic outcomes, rather than measuring success based on the number of hours donated or number of legal petitions prepared. In the expungement context, pro bono clinics need to be structured to ensure that individuals receive additional support to realize the transformative impact of expungement legal services.

This project will build on OneJustice's trusted relationships with QLSPs and pro bono professionals statewide. This project will support the pro bono community in sharing best practices to maximize volunteers' impact and innovate how legal services are delivered, with the goal of advancing more systemic change and transformative outcomes for low-income communities.



2. Target Population(s)

Target Population(s): Describe the population(s) that your project is designed to help. For support centers, this can be through providing services to qualified legal service projects. Describe all that apply. You may describe a single target population (e.g., you might describe “Californians who are already homeless” and “veterans” if your project would target veterans who are already experiencing homelessness), and/or multiple separate populations (e.g., you might describe “refugees” and “people with a disability” as distinctive populations served by your proposed project).

Our project will focus on maximizing the systemic impact of pro bono legal services across the State of California, with a particular focus on rural communities. As we know from the Justice Gap studies, 55% of Californians experience at least one civil legal problem in their household each year, and almost 70% of them receive no legal assistance for that issue. While pro bono is not the one-size-fits-all solution to the justice gap problem, it is one component of a multi-pronged approach that can, and does, make a difference.

Our primary target population will be QLSPs that have, or are building a pro bono program designed to have broad impact and stabilize and revitalize the low-income communities served by these organizations.

Our geographic area to be served is the entire state. We will target legal services organizations that are serving rural communities and underserved populations throughout California. This project will identify areas for broader systemic impact and will create opportunities to maximize the impact pro bono volunteers have on low-income communities.



3. Organizational Capacity

Describe the qualifications, experiences, and resources that the organization(s) will use to accomplish the proposal objectives.

OneJustice has 40 years of experience partnering with QLSPs and has established relationships with leaders and pro bono professionals and managers across California's legal aid sector. OneJustice organizes and leads regular convenings with pro bono professionals and managers working at legal aid organizations, law firms, in-house counsel, and law schools.

In addition, LAAC and OneJustice have substantial experience working collaboratively to maximize the impact of legal services organizations on low-income communities in California. Currently, OneJustice and LAAC are working collaboratively to highlight research findings and promote best practices in data collection and evaluation in the areas of housing, consumer, and immigration law. This project will expand on this work by developing a new training program targeted at pro bono professionals and managers and focused on improving transformative outcomes for low-income communities and deepening the systemic impact of pro bono legal services.

In recent years, LAAC and OneJustice have also published reports on issues of top concern for California's legal aid and pro bono community and provided training and resources for the legal aid sector, with the goal of creating transformative change both within the legal services organizations and for the low-income communities that the organizations serve. OneJustice and LAAC also regularly collaborate on advocacy efforts to increase the resources available to legal services organizations in California and on convenings for legal aid leaders, such as the spring 2023 retreat for over 30 executive directors of legal aid organizations and support centers statewide.



4. Project Administration

Describe the project structure including the staffing structure, supervision, if applicable, delegation of responsibility between organizations, use of volunteers, etc.

OneJustice will serve as the lead organization and project manager of this project, and LAAC will provide thought partnership with curriculum development, research on best practices and maximizing impact in pro bono assistance, and co-leading training sessions, as appropriate.

OneJustice and LAAC will work collaboratively to research and analyze data-driven practices, to promote those practices, and to train QLSP pro bono professionals. This includes gathering materials, data, and information from QLSPs and pro bono law firms and corporations. OneJustice and LAAC will leverage our core competencies of analytical research, data analysis, training development, and community engagement.

OneJustice and LAAC will hold regular planning meetings to ensure progress toward the project's goals.

OneJustice will build evaluation strategies into this project. Pro bono professionals will participate in evaluation surveys at the beginning of the training period and at the end of the training period. The surveys will track both satisfaction with the services and experience, as well as increases in skill, substantive knowledge, and pro bono opportunities that stabilize and revitalize low-income communities. We anticipate that the pro bono professionals will have:

- (1) An increased understanding of how they can use data to develop pro bono opportunities that will improve systemic outcomes for low-income communities, as well as articulate the systemic impact of pro bono opportunities to volunteers;
- (2) Implementation of new pro bono opportunities, utilizing data-driven project management, that stabilize and revitalize low-income communities; and
- (3) Increase in innovation in the pro bono opportunities offered, addressing systemic issues impacting low-income communities.



5. Project Goals and Deliverables

List the project's key goals and deliverables and describe how the project's goals will be met. Quantify where possible.

OneJustice and LAAC will identify data and information needed to create a report on the current state of pro bono, and its impact on low-income communities, in California. This report will create a baseline from which OneJustice and LAAC can work to determine the impact of various pro bono interventions.

OneJustice and LAAC will bring legal services organizations together for a structured training program over a six month timeframe to optimize the sharing and implementation of best practices that maximize the impact of volunteers on low-income communities. This project will encourage the expansion of pro bono initiatives where volunteers are most effective in advancing systemic outcomes and revitalizing and stabilizing low-income communities.

This project will be grounded on data-driven practices. In working with LAAC, OneJustice has brought data and evaluation conversations into every part of our work, from substantive housing, consumer and immigration work, to nonprofit management, strategic planning, and advocacy work. We believe data and evaluation are key components to ensuring organizations are offering volunteer opportunities that maximize systemic outcomes for low-income communities, whether structured as limited scope, full-scope or some other type of assistance. Our focus on data and evaluation also ensures that volunteers are able to understand the impact of the work they provide in contributing to broad systemic change.

This new training program will maximize the impact of the work being done by the pro bono volunteers in revitalizing and stabilizing low-income communities.

Organization	Type	Contact Name	Job Title	Email	Telephone	Is this organization a State Bar grant recipient?	Will you subgrant to this organization?	Approx. Date the partnership began
Legal Aid Association of California	501(c)(3)	Salena Copeland	Executive Director	scopeland@laaonline.org	510-893-3000 x 106	No	Yes	11/28/1983

6.a Partnerships and Subgrantees

Describe the nature of your partnership for every organization in the Collaborations table, above. Also describe the work they would do on this particular project. Provide quantitative goals where possible. For subgrantees in particular, describe how you will monitor their work to ensure accurate reporting and grant compliance. The amount of information that you provide affects the competitiveness of your proposal.



LAAC is a statewide membership organization for the legal aid sector and is familiar with the needs of legal services organizations. LAAC's mission is to serve and strengthen the legal aid community through advocacy, training, and support in legal aid efforts to provide critical legal assistance to low-income Californians and ensure equal access to justice. LAAC does this through advocating for increased funding, by coordinating legal aid opportunities to shape policy, by offering substantive and skills-based training to legal aid advocates, and working to connect legal aid staff around the state. Additionally, LAAC manages LawHelpCA.org, an online legal resource and referral tool that helps the hundreds of thousands of Californians seeking legal help. This website gives LAAC the unique perspective of understanding where people are seeking help and where no legal aid organization may be able to provide services.

OneJustice and LAAC have a strong history of collaborating with each other and have significant experience developing and disseminating resources for LSOs.

- Innovative Solutions: We have extensive experience mobilizing resources and developing innovative solutions to meet urgent needs. This includes critical resources developed during the pandemic, such as OneJustice's Remote Clinic Toolkit, Small Claims/Back Rent Toolkit, and Small Claims CourtWatch Project. Through our statewide listservs and other communication channels, we can quickly promote and distribute resources, generate data and community feedback through surveys, and set up convenings.
- Data-Driven Practices: OneJustice and LAAC's report on "Social Work Practices in California Legal Aid Organizations," LAAC's "Justice at Risk" report on recruitment and retention, as well as LAAC's participation in the Rural Justice Policy Paper Series with the Access to Justice Commission, demonstrate our experience in gathering data from the legal aid community, identifying best practices, and providing guidance to the community.
- Technical Assistance: We have a long history of developing best practices guides, providing embedded technical assistance, and facilitating learning convenings for LSOs. OneJustice also provides individualized technical assistance to LSOs on an array of issues, including program impact analyses, service delivery model evaluations, and pro bono management and delivery systems.
- Convenings: We facilitate statewide, regional, and issue-based convenings for LSOs and other stakeholders. OneJustice facilitates regional pro bono managers meetings, creating space for pro bono managers from legal services organizations to discuss pressing needs and challenges and opportunities to collaborate and share resources. For over a decade, OneJustice has coordinated the California Joint Pro Bono Manager Forum, a quarterly webinar bringing together pro bono managers from legal services organizations and from law firms and corporations to discuss issues relevant to the community, including new and emerging legal issues, and to share innovative pro bono models. OneJustice also annually hosts the statewide pro bono conference which brings together stakeholders from California's pro bono community, including legal services organizations, law schools, private law firms, corporations, community based organizations, bar associations, courts and more. The conference fosters collaboration and community building and provides opportunities to strategize and learn from one another through panel discussions, interactive workshops, and networking.



The proposed project will integrate staff members from OneJustice and LAAC, combining our related, but distinct, multi-disciplinary toolboxes, experiences, and skill sets to accomplish the project objectives. The project will be led, coordinated, and administered by Program Directors at OneJustice who have extensive experience working with pro bono professionals at legal services organizations. In addition, Program Managers, Coordinators, and Associates at OneJustice will provide important connections, thought partnership, and project management with the pro bono professionals. Senior program staff at LAAC will provide assistance with data and evaluation best practices, convening legal services organizations, and assessing the impact of pro bono projects.

To manage the project, the team will develop an online action plan to identify all action steps, and assign implementation of those action steps to specific team members. The team will meet regularly to ensure ongoing progress, and that those deliverables are being met.

OneJustice and LAAC will ensure quality control by: (a) implementing strict quality control procedures for all written resources; and (b) ensuring that training sessions comply with Adult Learning Principles and Equitable Teaching Practices.

We will also check in frequently with LSOs regarding their needs and monitor the use of our resources to ensure that we are responsive to the community's needs and utilization patterns.

Before each LSO training, members of the project management team will review each training session plan to ensure compliance with Adult Learning Principles, so that the learnings are conducive to the different learning styles of adults, and with Equitable Teaching Practices, removing linguistic and other barriers to effective learning for attendees from different backgrounds.

OneJustice will be responsible for ensuring that the project goals and deliverables are met. The first phase of the project will focus on project planning and design, development of new training program and curriculum, recruitment of pro bono professionals at legal services organizations throughout California, and the beginning of an assessment of the current state of pro bono in California. Both LAAC and OneJustice will participate in the planning efforts.

In the next phase of the project, OneJustice and LAAC will begin the six month training program, with the topics finalized based on the research and surveys conducted in the first phase. Anticipated sessions include data-driven planning and evaluation, strategic deployment of pro bono resources, project management and implementation, and volunteer recruitment and retention. In addition, throughout the sessions, OneJustice and LAAC will be fostering peer-to-peer learning and collaboration. OneJustice and LAAC plan to release the completed pro bono report as well.

In the third phase of the project, OneJustice will provide in-depth consulting, coaching, and technical assistance



to implement the learnings from the training program. OneJustice and LAAC may potentially offer an additional training series to organizations that were unable to participate in the first six-month training program. This will depend on funding levels, as well as the amount of technical assistance, consulting, and coaching support needed by the organizations that participated in the initial six-month training program following the conclusion of the training series. For recent OneJustice cohort-based training programs, the demand from legal aid organizations has significantly exceeded our capacity constraints. An additional cycle of the training program (potentially a condensed version of the program) would enable us to meet the demand from legal services organizations for guidance and support in maximizing the impact of their pro bono programs on low-income communities.

This project is focusing on pro bono professionals at legal services organizations. However, for the program to be fully successful, OneJustice and LAAC will need to be in communication with pro bono professionals in the private sector. To address this, we plan to communicate aspects of the project to the private sector pro bono professionals, through our listservs, pro bono convenings, and other avenues. In addition, we will explore opportunities for private sector pro bono professionals to share in the learnings from the training programs (for example, participating in certain sessions, as appropriate) to maximize the project's impact. We believe that the private sector pro bono professionals will be supportive of this project and will be critical to legal services organizations' successful implementation of the innovations that they have identified through the training program.

This is a critical opportunity for cross-sector learning, where OneJustice and LAAC can create space for pro bono professionals in the private sector and at legal services organizations to have direct and productive conversations to increase the overall availability and systemic impact of pro bono services.

7. Will this project address foreclosure prevention or community redevelopment in rural communities?

For the purposes of this grant "rural" is defined as areas that meet the definition of "rural" or "frontier" that the medical community uses to analyze the availability of medical services. This classification scheme is known as Medical Service Study Areas (MSSAs). Rural MSSAs have 50,000 or fewer residents and population densities below 250 people per square mile, while "frontier" MSSAs are defined by population densities of fewer than 11 people per square mile.

Click on the View Map button to help identify rural areas in narrative response below.

- ☒ Yes
☐ No



7.a. If yes, identify the rural communities and specify how the project will address foreclosure prevention or community redevelopment.

The target demographic is low-income communities across California, with a particular focus on rural communities. Rural areas served include the 23 counties in the northern part of the state, the Central Coast and Central Valley, and the Inland Empire.

OneJustice develops programs to meet local and regional needs by engaging with the legal services organizations that serve those communities. OneJustice will also identify other community-based nonprofits that work with pro bono volunteers to expand the availability and systemic impact of pro bono legal services throughout California. OneJustice will work with the pro bono professionals at legal services organizations to refine their metrics of their success in revitalizing and stabilizing communities, beyond traditional metrics such as number of volunteers recruited or number of hours donated by volunteers.

As statewide support centers, both OneJustice and LAAC have a successful track record of expanding legal resources available to rural and underserved communities. OneJustice offers trainings to legal services organizations throughout the state, including those working with rural and underserved communities. For example, OneJustice's Executive Fellowship program has trained over 50 leaders from organizations serving rural communities. Similarly, as a membership organization for legal services organizations in California, LAAC has strong contacts at member organizations serving rural and underserved regions. In addition, LAAC's research and analysis will be instrumental in targeting rural and underserved communities and maximizing this project's impact. See e.g., the Rural Justice Policy Paper Series, co-authored by LAAC, including the 2021 report, "Health Equity and Rural Attorney Deserts."

Proposed Activities		Proposed Activities	
Quarter	Responsible Partner	Activity	Deliverables
2024			



Q1 January-March	OneJustice and LAAC	Develop survey of pro bono programs at California legal services organizations, to collect data and information, to recruit participants for the cohort, and to develop the curriculum for the training program	Survey to send to California legal services organizations.
Q2 April-June	OneJustice and LAAC	Launch survey and collect results, begin to develop curriculum for the training program	Survey results. Initial draft of training program curriculum.
Q3 July-September	OneJustice and LAAC	Continue to analyze results, conduct research and begin putting together a California pro bono report. Begin recruiting cohort participants	Analysis of survey results. Bank of research relating to pro bono impact.



Q4 October-December	OneJustice and LAAC	Finalize training curriculum and materials, recruit and finalize members of cohort, continue drafting California pro bono report	Completed training program curriculum and materials Cohort of pro bono professionals to attend training program Rough Draft of California pro bono report
2025			
Q1 January-March	OneJustice and LAAC	Launch training program and provide technical assistance for cohort members. Finalize California pro bono report	California pro bono report. Recorded trainings and materials.
Q2 April-June	OneJustice and LAAC	Continue training program and development of additional materials. Continued technical assistance to pro bono professionals at legal services organizations.	Recorded trainings and materials. Individualized support for pro bono professionals at legal services organizations.



Q3 July-September	OneJustice and LAAC	Complete six month training program with cohort. Continued technical assistance and individualized support.	Full curriculum of recorded trainings and materials. Knowledge sharing among pro bono professionals at legal services organizations.
Q4 October-December	OneJustice and LAAC	Individualized technical assistance, coaching and consultation to pro bono professionals at legal services organizations. Sharing of training program curriculum and materials with other California legal services organizations	Individualized support for pro bono professionals at legal services organizations. Knowledge sharing among pro bono professionals at legal services organizations.

FORM C - PROPOSED BUDGET AND NARRATIVE

Enter your proposed budget for the entire grant period in the worksheet below. The total in this table should match the total amount requested in Form A.

Round to the nearest two decimals for the full-time equivalent (FTE) personnel table.

Personnel

Personnel	Proposed Budget	Narrative
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1. Attorneys	\$150,096	CEO (FTE: .02) provides supervision of the entire project including quality assurance; Program Directors (FTE: .5) with expertise in legal aid service delivery models and technical assistance delivery.
2. Paralegals	\$0	
3. Other Staff	\$81,954	Program Manager(s), Coordinator(s), and Associate(s) (FTE .51), with expertise in legal aid service delivery models and technical assistance delivery.
SUBTOTAL	\$232,050	
4. Employee Benefits	\$48,730	21% for payroll taxes and fringe.
TOTAL PERSONNEL	\$280,780	

Non-Personnel

Non-Personnel	Proposed Budget	Narrative
5. Space	\$0	
6. Equipment Rental and Maintenance	\$0	
7. Office Supplies	\$158	This project's allocated share (6.32%) of office-wide office supplies, allocated by the ratio of this project's salaries to the organization's total salaries during the same period. This amount represents 0.00135 FTE of project staff's personnel salaries and fringe. The total organizational cost for this item is \$2,500
8. Printing and Postage	\$316	This project's allocated share (6.32%) of office-wide printing and postage costs, allocated by the ratio of this project's salaries to the organization's total salaries during the same period. This amount represents 0.00135 FTE of project staff's personnel salaries and fringe. The total organizational cost for this item is \$5,000
9. Telecommunications	\$0	
10. Technology	\$7,312	This projects allocated share (6.32%) of costs for technology and training platforms such as Zoom, allocated by the ratio of this project's salaries to the organization's total salaries during the same period. This amount represents 0.00138 FTE of project staff's personnel salaries and fringe. The total organizational cost for this item is \$115,732.
11. Program Travel	\$0	
12. Training	\$0	



13. Library	\$0	
14. Insurance	\$1,516	This project's allocated share (6.32%) of insurance, allocated by the ratio of this project's salaries to the organization's total salaries during the same period.
15. Litigation	\$0	
16. Capital Additions	\$0	
17. Contract Service to Clients	\$0	
18. Evaluation	\$0	
19. Other	\$3,159	This project's allocated share (6.32%) of other, necessary organizational costs including: other professional fees, IT professional fees, computer hardware and software, furniture and equipment, meals, advertising for open positions, taxes and fees, interest and bank charges, depreciation, and misc. expenses; allocated by the ratio of this project's salaries to the organization's total salaries during the same period.
TOTAL NON-PERSONNEL	\$12,461	
Administrative	Proposed Budget	Narrative
20. Personnel	\$28,010	This project's fair share (5.63%) of salaries and fringe directly related to Bank Grant -funded activities and services, including personnel expenses for finance (e.g. accounting) and work with the Board of Directors, allocated by the ratio of this project's total expenses (personnel and non-personnel) to the organization's total expenses during the same period. This amount represents 0.1 FTE administrative personnel salaries and fringe.
21. Non-Personnel	\$18,749	This project's fair share (5.86%) of nonpersonnel administrative costs directly related to HPIV Supplemental-funded activities and services, allocated by the ratio of this project's total expenses (personnel and non-personnel) to the organization's total expenses during the same period.
TOTAL ADMINISTRATIVE	\$46,759	
22. Total Subgrants	\$60,000	
GRAND TOTAL	\$400,000	

1. Lawyers

Title/Position	FTEs
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CEO	0.02
Director	0.5
	0
Total Lawyers	0.52

2. Paralegals

Title/Position	FTEs
	0.00
	0.00
Total Paralegals	0.00

3. Other Staff

Title/Position	FTEs
Manager(s), Coordinator(s), Associate(s)	0.51
	0.00
	0.00
	0.00
	0.00
Total Other Staff	0.51

TOTAL PERSONNEL (in FTEs)	1.03
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Subgrants

Partner Organization	Amount	Describe Proposed Expenses
Legal Aid Association of California	60000	
Total:	60000	

% Personnel: 92.20%**% Non-Personnel:** 7.80%

3. If the proposed budget allocates less than 75 percent to personnel, explain why it deviates from the recommended percentages.

% Program: 88.31%**% Admin:** 11.69%

4. If the proposed budget allocates less than 75 percent to program, explain why it deviates from the recommended percentages.



Form D - Project Assurances

Download the Assurances document and upload a signed copy below.

Upload PDF Version of
Signed Assurances
Document:

2024_Project_Assurance.pdf
203.2 KB - 08/29/2023 8:33PM

Total Files: 1

Supporting Documents (Optional)

When naming optional supporting documents, please include the Organization's acronym (or short name) and a one- to five-word file description (note: any type of file may be uploaded).

Audit Extension ☐ Yes
Requested: