



The State Bar of California

OPEN SESSION AGENDA ITEM 3.5 NOVEMBER 2023 LEGAL SERVICES TRUST FUND COMMISSION

DATE: November 9, 2023

TO: Members, Legal Services Trust Fund Commission

FROM: Members, Legal Services Trust Fund Commission Eligibility and Budget Review Committee

SUBJECT: Approve Greater Bakersfield Legal Assistance's 2022 IOLTA Budget Revision

EXECUTIVE SUMMARY

Greater Bakersfield Legal Assistance, Inc. (GBLA) submitted a request to revise its 2022 IOLTA budget by approximately 25 percent. Staff recommended approval of the request because it appeared targeted toward maintaining services by moving funds away from positions that remained vacant (paralegals) into classifications where positions were filled (attorneys, other staff). Some funds also went to temporary positions. The Eligibility and Budget Review Committee concurs with the staff recommendation and recommends that the Legal Services Trust Fund Commission (LSTFC) approve the request.

BACKGROUND

Pursuant to the Functional Matrix, budget revision requests that exceed 25 percent of the grant award require LSTFC approval. GBLA reported a budget deviation in the amount of 25 percent for its 2022 IOLTA award. It also deviated from the recommended expense ratio of 75 percent or more of the grant award allocated to personnel and 25 percent or less allocated to nonpersonnel expenditures with approximately 72 percent budgeted for personnel and 28 percent budgeted for nonpersonnel.

DISCUSSION

GBLA reported delays in hiring paralegals, which significantly decreased expenditures for that line item. Some funds went to other personnel. As part of its submission, GBLA further stated

its nonpersonnel and administrative expenditures increased because, “GBLA employed 3 head count through temporary or contract services during the budget period (accounting clerk, IT support and maintenance).” Nonpersonnel expenditures also changed because they are tied to the proportion of full-time equivalent staff assigned to the grant over total staff. Staff recommended approval, and the Eligibility and Budget Review Committee agrees.

FISCAL/PERSONNEL IMPACT

None

RECOMMENDATIONS

RESOLVED, that the **Legal Services Trust Fund Commission** approves the budget revision request submitted by Greater Bakersfield Legal Assistance, Inc., regarding its 2022 IOLTA budget.

ATTACHMENT(S) LIST

None