



The State Bar *of California*

OPEN SESSION

AGENDA ITEM

3.6 MARCH 2024

LEGAL SERVICES TRUST FUND COMMISSION

DATE: March 29, 2024

TO: Members, Legal Services Trust Fund Commission

FROM: Legal Services Trust Fund Commission Partnership Grants Committee

SUBJECT: 2023 Partnership Grant Carryover Request in Excess of 25 Percent of the Grant Award

EXECUTIVE SUMMARY

Organizations that receive Partnership Grant funding may request a modification of their approved grant budget or request a carryover of their grant award. During the grant period, organizations may submit requests to modify approved grant budgets on a rolling basis. For Partnership Grants that ended on December 31, 2023, final requests to modify approved budgets or to carryover funds were due January 31, 2024.

Requests equal to or exceeding 25 percent of the total grant award require Legal Services Trust Fund Commission (LSTFC) review and approval. After review and discussion at its February 6, 2024, meeting, the Partnership Grants Committee recommends approval of the 2023 Partnership Grant carryover request above 25 percent of the grant award.

BACKGROUND

Grantees seeking to modify their budgets or to carryover funds to the following grant year must submit a request. The spenddown period to carryover funds for grants that ended on December 31, 2023, will be from January 1, 2024, to June 30, 2024; unspent funds after June 30, 2024, must be remitted to the State Bar. In the Legal Services Trust Fund Program General Grant Provisions, provision 7.01 states that recipients shall not materially deviate from the approved budget without first obtaining prior written approval. Budget modification requests must fully delineate the reason for the revision and any effect on services provided. According to the Commission's Functional Matrix, changes that are less than 10 percent of the total award are allowed. State Bar staff (staff) may review and approve requests that are between 10 and 25

percent of the total award, while those equal to or greater than 25 percent require Committee and LSTFC approval.

Staff review each budget modification and carryover request and calculate the percent of the total award that the request represents to determine if it requires Committee and LSTFC approval. Staff review the stated reason for a budget modification and/or carryover and the potential effect on services provided and assess the budget narratives to determine whether the proposed use of funds is reasonable (e.g., would continue to fund qualifying work or would not pay for a different project's costs, etc.) Past explanations for requests that have been found reasonable include, but are not limited to, unanticipated staffing changes, hiring delays, unexpected receipt of additional funding, and changes in legislation that impacted project goals. Past explanations that have been found unreasonable include an organization failing to clearly address how it will spend carryover funds along with new allocations, high budget deviation amounts, and repeated requests for modification or carryover year over year.

DISCUSSION

Staff received one budget revision and three carryover requests from grantees for 2023 Partnership Grants (Attachment A). Of those requests, one carryover request exceeded 25 percent of the grantee's total grant award.

1. Elder Law and Advocacy (ELA, 30 percent)
 - ELA explained that a different choice in technology for its public stations delayed completion of its project. Installing enhanced laptops instead of kiosks required carryover of both technology funds and staff funds to manage the project.

See Attachment A for full description.

The Partnership Grants Committee discussed the request at its February 6, 2024, meeting, determined that the request was reasonable, and recommends the LSTFC approve the request.

RECOMMENDATION

Should the LSTFC concur with the Partnership Grant Committee's recommendation, adoption of the following resolution is recommended:

RESOLVED, the LSTFC approves the 2023 Partnership Grant carryover request in excess of 25 percent of the grant award, as reflected in Attachment A to this memorandum.

ATTACHMENTS

- A. 2023 Partnership Grant Budget Revision and Carryover Requests

**2023 PARTNERSHIP GRANT BUDGET REVISIONS AND/OR CARRYOVER REQUESTS
IN EXCESS OF 25 PERCENT OF GRANT AWARD**

Organization	Project Name	Grant Type	Grant Amount	Carryover Amount	Carryover Percentage
Elder Law and Advocacy	Imperial County Elder Abuse Technology Project	2023 PG	\$105,000	\$31,899	30%

Rationale: Elder Law and Advocacy made a different choice in the technology for the public stations. Instead of kiosks, we are installing enhanced laptop stations. These will be less expensive than kiosks but will provide an excellent user experience. There is still a lot of work to be done on this project, hence carryover both technology funds and staff funds to manage and supervise this project. We are also planning to increase the lead attorney time at the Court Clinic.

**2023 PARTNERSHIP GRANT BUDGET REVISION AND/OR CARRYOVER REQUESTS
BETWEEN 10 AND 25 PERCENT OF THE GRANT AWARD
(FOR REFERENCE ONLY: STAFF-APPROVED)**

Organization	Project Name	Grant Type	Grant Amount	Budget Revision Amount	Budget Revision Percentage	Carryover Amount	Carryover Percentage
LACBA Counsel for Justice	Domestic Violence Legal Services Project (DVP)	2023	\$104,000	\$11,456	11%	\$20,280	20%
Family Violence Law Center	Domestic Violence Pro Per Project	2023	\$25,000	N/A	N/A	\$2,936	12%