



2025 PARTNERSHIP GRANTS REQUEST FOR PROPOSALS

This document provides information for organizations interested in submitting proposals for Partnership Grants. Organizations should review this document to ensure that the proposed projects are eligible for this funding.

Partnership Grants are competitive and discretionary. Project proposals must be submitted on SmartSimple by **5:00 p.m. on Thursday, May 9, 2024.**

If you have any questions, please contact Angela O'Hara at angela.ohara@calbar.ca.gov.

BACKGROUND

The State Budget Act establishes the Equal Access Fund “to improve equal access and the fair administration of justice.” The Equal Access Fund is allocated to the Judicial Council and administered by the State Bar of California, through its Legal Services Trust Fund Commission (LSTFC). Ten percent of the Equal Access Fund is reserved for “joint projects of courts and legal services programs to make legal assistance available to pro per litigants.”

Partnership Grants are awarded through a competitive process. Grants are awarded for a one-year period commencing January 1 and ending December 31. Decisions of the LSTFC, as approved by the Judicial Council, are final; there is no appeals process. Due to the limited availability of funding, grant award allocations vary, and all proposals may not be funded. For the 2024 grant year, 37 eligible projects were funded in a range from \$25,000 to \$262,000 for a total of \$4.69 million.

Consideration will be given to ensure this funding supports projects serving a diverse range of geographic areas, substantive issues, and client constituencies. At the conclusion of the grant year, grantees must submit a report and evaluation on the use and impact of these funds.

2025 PARTNERSHIP GRANTS SCORING RUBRIC

In an effort to provide transparency and equity in the review process, the Legal Services Trust Fund Commission uses a scoring rubric as a tool to help guide review of all proposals. The rubric

is comprised of four sections - Eligibility Requirements, Selection Criteria, Funding Priorities, and Innovation.

Eligibility Requirements

This section is not weighted. Applicants must meet the following criteria to be eligible to submit a proposal:

- **Qualified Legal Services Projects (QLSPs):** Pursuant to Business & Professions Code 6210 et seq., only QLSPs are eligible to apply for Partnership Grants.
- **Joint Court/Qualified Legal Services Projects:** Proposals must be for projects jointly developed and implemented by California State courts and QLSPs. Partnership Grant funding may be used to support supervised settlement services to assist litigants in settling their litigation, so long as the settlement services are a component of court-based litigation and overseen by an attorney.
- **Indigent Persons:** Use of Partnership Grant funds is restricted to the provision of services to indigent persons as defined under Business and Professions Code §6213(d). “Indigent person” means a person whose income is (1) 200 percent or less of the current poverty threshold established by the United States Office of Management and Budget or (2) who is eligible for Supplemental Security Income or free services under the Older Americans Act or Developmentally Disabled Assistance Act.
- **Self-Represented Civil Litigants:** Partnership Grant funding is restricted to providing assistance to individuals who are or expect to be engaged in civil litigation without representation by counsel. These funds cannot be used to make court appearances on behalf of litigants. Self-represented litigants are not prohibited from forming a confidential relationship with a lawyer, so long as they are unrepresented when they appear in court and an attorney does not sign or appear on any of their court filings.

If the proposed project will be serving non-indigent persons or if individuals will be engaged in civil litigation, the project must identify non-Partnership Grant funds that will be used to cover this work.

Selection Criteria (85 points)

Based on responses provided in the proposal, the LSTFC will evaluate the project based on the following categories: court involvement, project impact, administration, continuity planning, and evaluation. The LSTFC will score each category as “Exceeds Expectations,” “Meets Expectations,” or “Below Expectations” with corresponding multipliers for a maximum of 85 points. Generally, responses that provide relevant and detailed information, such as metrics or specific examples, would be scored favorably. Responses that do not appear responsive to the selection criteria’s description may be considered “below expectations.”

Funding Priorities (15 points)

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

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

- Whether the project is new. The LSTFC maintains discretion to determine what is considered a new project, and may consider factors, that include, but are not limited to, whether the project was previously or currently funded or proposes a substantial change to an existing service delivery model.
- Whether the project supports underserved populations. Whether a population is “underserved” may be based on factors such as unmet rural needs, or on the population comprising individuals with particular characteristics who are underserved in the particular county, including but not limited to characteristics based on race, ethnicity, age, limited English proficiency, disability status, and veteran status.

Optional – Innovation (up to 5 points)

The LSTFC encourages innovative projects and may award up to 5 bonus points for innovation.

Examples of innovation may include:

- Projects exploring new ways of providing services or using technology to expand or improve services.
- Initial projects in a case type (first consumer program, first conservatorship program, etc.)
- Projects with models that were successful in other jurisdictions but are new to the court.
- Projects involving courts that have not had projects in a long time.

ELIGIBILITY REQUIREMENTS			
Please select “yes” or “no” for each requirement.			
Applicant is a Qualified Legal Services Project.	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
Proposal is jointly developed and implemented by a California State court.	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
Proposed services will be provided only to indigent persons, as defined under Business and Profession Code §6213(d).	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
If NO, has the project identified non-Partnership Grant funds that will cover this work?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> N/A
Proposed services will be provided only to self-represented litigants (individuals who are or expect to be engaged in civil litigation without representation by counsel).	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
If NO, has the project identified non-Partnership Grant funds that will cover this work?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> N/A

DEFINITIONS	
Exceeds Expectations	Response is very high quality, addressing all questions in the request for proposal and all elements of the selection criteria. The identified strengths are substantial with minimal or no weaknesses. Any identified weakness has minimal effect on the overall quality of the response.

Meets Expectations	Response is good, effectively addressing most questions in the request for proposal and selection criteria. Strengths and weaknesses are identified that may balance each other in significance. Overall quality of response is satisfactory.
Below Expectations	Response is weak, neglecting to address questions in the request for proposal and elements of the criteria. The identified weaknesses hold significant weight, overshadowing the identified strengths. Overall quality of response is inadequate, with significant flaws in key elements.

SELECTION CRITERIA (85 PTS)

Checkmark the appropriate ranking for each category, and then multiply by the number below. Add sub scores from A and B to get the total points for this section.

CATEGORY & DESCRIPTION	Exceeds Expectations	Meets Expectations	Below Expectations
<u>Court Involvement</u> A successful proposal will indicate significant cooperation between the partner court and legal services organization, integration with other court-based services, and if the project's services are to be reserved for only one litigant role, such as petitioners but not respondents, this has been thoroughly explored with the court, and alternate legal resources that can provide meaningful if not equivalent levels of assistance to the opposing parties have been identified.			
<u>Project Impact</u> A successful proposal will clearly describe the needs of the targeted population and how anticipated outcomes and related budget of the proposed activity(ies) will have a meaningful impact on this population. Outcomes may include the number of people served, nature of the impact, and other project deliverables that will be achieved with this grant funding during the grant period.			
A. Number of Check Marks	X20=	X15=	X10=
Subtotal (A)			
<u>Administration</u> A successful proposal will demonstrate the ability and capacity to implement and manage the proposed activity(ies). Strong administration includes adequate staffing, leadership, and oversight of project monitoring, outreach, and resource development. An applicant's historical demonstration of its ability to meet goals from prior grants and timely reporting of results/outcomes will also be considered under this category.			
<u>Continuity Planning</u> A successful proposal will address whether or how its proposed services can continue with funds other than those provided by Partnership Grants and			

provide details of past efforts and future plans to secure such alternate funding.			
Evaluation A successful proposal will incorporate meaningful evaluation plans and metrics that effectively demonstrate whether and how the project's planned goals are being achieved. This may include a clear statement of the project goals, strategies to be used to achieve those goals, evaluation methods to be used to make any mid-course adjustments to the delivery model, and evaluation methods to gauge the project's success. Returning organizations applying for the same funding opportunity will also need to address prior evaluation outcomes and metrics.			
B. Number of Check Marks	X15=	X10=	X5=
Subtotal (B)			
Selection Criteria Total (A+B)			

FUNDING PRIORITIES (15 PTS)

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

In making decisions regarding funding priorities, consider factors that include, but are not limited to: <ul style="list-style-type: none"> Whether the project is new. The LSTFC maintains discretion to determine what is considered a new project, and may consider factors, that include, but are not limited to, whether the project was previously or currently funded or proposes a substantial change to an existing service delivery model. Whether the project supports underserved populations. Whether a population is "underserved" may be based on factors such as unmet rural needs, or on the population comprising individuals with particular characteristics who are underserved in the particular county, including but not limited to characteristics based on race, ethnicity, age, limited English proficiency, disability status, and veteran status. 	3 2 1
Funding Priority Total Score	X5 =

OPTIONAL INNOVATION (up to 5 PTS)

The LSTFC may exercise discretion in awarding points for innovation. Based on your review of the proposal, determine if you wish to score additional points for innovation and provide your reason(s) below.

In deciding to award additional points for innovation, consider factors such as whether the project explores new ways of providing services or using technology, offers an initial case type (first consumer program, first conservatorship program, etc.), or applies a model that was successful in another jurisdiction but is new to this court.	YES	NO
Bonus Points Awarded (1-5 pts)		
Reason(s) for awarding bonus points for innovation:		

GRANTMAKING TIMELINE

Date(s)*	Activity
April 4, 2024	Application released
May 9, 2024	Applications due
May-July, 2024	LSTFC and staff review and score applications
August 9, 2024	LSTFC makes funding recommendations
September 19-20, 2024	Judicial Council approves grant recommendations
November 15, 2024	Applicants submit budgets and remaining application information (i.e., letter of support, MOUs)
December 31, 2024	Grant agreements signed
January 1, 2025	Grant period starts

*Dates are approximate to accommodate applicant, commissioner, and staff availability and needs

REPORTING REQUIREMENTS

At the end of the grant year, grantees must submit a comprehensive report and evaluation on the use and impact of the Partnership Grant funds, providing quantitative and qualitative data describing project activities.

Reporting requirements will include:

- A. **Expenditures:** Report actual expenditures for the grant period. Grantees with discrepancies in actual expenditures compared to the approved budget or approved budget modification must provide an explanation. Any Partnership Grant funds that remain unspent at the end of the grant period without an approved carryover must be returned to the State Bar. Grantees with approved carryovers are permitted to spend remaining Partnership Grant funds for up to an additional six months and will be required to close out the grant at that time.
- B. **Activities:** Report on all project activities funded by the Partnership Grant during the grant period, including project focus areas, demographic groups served, language services offered, project goals versus actuals, services provided, and number of individuals served.
- C. **Evaluation:** Report on evaluation efforts during the grant period, including how litigant feedback was obtained and how project impact was assessed. Grantees will also describe how project staff and partner court staff collaborated to provide services.