



Grant Year: 2025

Due Date: May 9, 2024 5:00pm PT

Prepared by: Jenna MacRae

Email: jmacrae@elaca.org

Contact Phone: 858-565-1392

Funding Opportunity: Partnership Grants

Project Title: Imperial County Restraining Order and Unlawful Detainer Clinic

Program Name: Elder Law & Advocacy

Applicant Title: Director of Fund and Program Development

Address: 5151 Murphy Canyon Road Suite 110

City: San Diego

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

Form A - Project Profile

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

1. Application Contact: Jenna
MacRae

Job Title: Attorney/Director of Fund &
Program Development

Email: jmacrae@ela
ca.org

Telephone: 858-565-1392

2. Total Amount \$83,800
Requested:

Request project amounts
divisible evenly by \$100.



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

County(ies) Served by this Project

Imperial

4. Substantive Area(s)

Family/Domestic Violence, Housing, Other

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

2 years -- The scope of this project have grown to include Elder Abuse Restraining Order, Domestic Violence Restraining Orders, Civil Harassment Restraining Orders, and Unlawful Detainers.

6. Project Abstract

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

The Imperial County Restraining Order and Unlawful Detainer Clinic is intended to serve older adult self-represented litigants, including those who are limited or non-English speakers, and offer services at the central Imperial County Superior Court. The goal for each participant is that they will be able to gain legal information regarding Restraining Orders or Unlawful Detainers, depending on what is appropriate for their situation, and successfully complete the necessary paperwork to submit a request and/or answer. The project will be an expansion of the 2023 and 2024 Partnership Clinic which created two Restraining Order kiosks located within the Imperial County Courthouse. Along with staff, the kiosks will guide eligible participants through the process of a restraining order in a step-by-step manner in order to facilitate accurate completion of the required forms. Elder Law & Advocacy (EL&A) will work to serve residents of this geographically large, diverse, and underserved county. Meetings between EL&A and the Court will consist of in-depth discussions of matters concerning ongoing clinic operations and will result in changes where indicated.



Form B - Project Description

1. Court Involvement

1a. Partner Court(s)

This was a new project in 2023 and has been a new collaboration between Elder Law & Advocacy (EL&A) and the Imperial County Courthouse.



1b. Court Involvement

Describe the current/planned coordination and collaboration on this project with the Partner Court identified, including but not limited to:

- Integration with existing court-based services
- Use of facilities and court resources
- Types and frequency of meetings planned
- Any other aspects not described above

(250 word limit)

The Court would provide some of the required infrastructure (e.g. internet access and kiosk location) as well as provide information to potential participants of this resource. Individuals with issues beyond the scope of the clinic can be referred to the court's Access Center, Law Library, or Small Claims Advisor. Similarly, the staff in these offices will be aware of the clinic and refer individuals to Elder Law & Advocacy in Restraining Order situations.

EL&A has an office located within the Courthouse and has maintained a collaboration with the Imperial County Superior Court at the El Centro courthouse location since 2009, with the establishment of the Partnership Grant-supported conservatorship/guardianship clinic. The Imperial County Superior Court has agreed to provide space and infrastructure required for a kiosk within the courthouse, participate in ongoing partnership clinic meetings, and refer clients for project services. The courthouse itself is readily accessible by public transportation, is wheelchair accessible and nearby parking is free. Our kiosks will likely be located within EL&A's office initially, in order to carefully monitor participation.

The project and court staff will engage in informal communications on as as-needed basis, and will engage in more formal, scheduled quarterly meetings with representatives identified by each of the partners. The meetings will take place in March, June, September, and December. Formal meetings will cover specific issues concerning operations, service delivery challenges, and substantive law and procedural issues which affect the access of self-represented litigants to the judicial system such as legislation and court rules.



2. Project Impact

2a. Needs Assessment

Target population(s): Describe the population(s) that your project is designed to help. You may describe a single target population and/or multiples. Describe why the target population is in particular need of the services to be provided. (250 word limit)

As a rural and geographically large county, Restraining Order litigants must consider other expenses associated with civil litigation. Both parties must consider the time and travel costs associated with court hearings. Self-represented litigants must consider irregular work schedules and family obligations when dealing with an eviction. Many individuals face travel times of an hour or more to simply file a document with the court. Most low-income and/or elderly individuals cannot easily access e-filing systems. They regularly must take time off from work and spend precious dollars on gas just to go to the courthouse. Self represented litigants that do not own a car must arrange rides with a friend or family member, access the very limited public transportation system, or rent a car for what some would consider a simple trip to the courthouse. In addition, county residents have to deal with extreme heat for much of the year. The clinic's services save self-represented litigants time and money by reviewing documents prior to filing, which often eliminates the need for travel back to the courthouse just to correct filing errors.

Prior to the opening of this clinic in 2023, Court staff has expressed a need for assistance with Restraining Orders. We have opened the clinic to civil harassment, domestic violence, and elder abuse restraining order for those individuals 60 years or older. Since the closing of the Unlawful Detainer Clinic at the end of 2022, our Senior Legal Services program located within the Courthouse has seen a continued need for assistance with Unlawful Detainer answers and responses.



2b. Areas to be served

Describe the geographic area(s) to be served by the project. If you consider this area to be rural or if this project will meet unmet rural needs, please explain why. (250 word limit)

Imperial County residents face significant financial challenges in accessing legal assistance. It ranks as one of this state's poorest counties in terms of income. According to the U.S. Census Bureau 2013-2017 American Community Survey 5-Year Estimates, per capita income for residents was \$17,303, with nearly 23.8% of its residents living below poverty level. The county has one of the highest unemployment levels in the State-17.3%, per the California Employment Development Department, Imperial County Profile (December 2018). In addition, it has a very high percentage of older individuals living in poverty. Residents need services in a language they can understand, especially when their safety or civil rights are at stake. According to the U.S. Census Bureau Report (2012-2016), 83.8% of the county's population was Hispanic, with over 76% of residents reporting that they speak a language other than English at home.

Imperial County is a rural and frontier region (MSSA-Medical Service Study Areas, California.) It is in the southern most part of California, bordering Mexico and Arizona. The county encompasses 4,176 square miles. 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 clinic like this one a critical resource for the county's low-income and 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, Seeleyand, and Winterhaven.



2c. Types of Services to be Provided

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

The Imperial County Restraining Order and Unlawful Detainer Project will be designed to provide information and direct assistance related to Restraining Orders or Unlawful Detainers. The project intends to include in-person and technology-based program at the courthouse location that offers the following services: a) information about restraining orders and unlawful detainers; b) assistance with completion of all necessary documents; c) review of the court forms prepared; d) information and assistance with court filings and service of process requirements; e) information concerning court procedures and protocols; and f) referrals to appropriate resources.

The project will use a walk-in model with a sign-in sheet format to match the number of participants to clinic resources. One-on-one services will be available 2 days per week, initially on Tuesdays and Wednesdays from 9:00 – 12:00 pm. Depending on the participant's issue, the participant may be assisted using the kiosk, may be assisted in-person, or may be provided use of available resources and samples. The kiosks will provide in-depth information about the process, and will facilitate completion of the required forms. Staff will be available to address any issues users may face using the technology. The completed forms will be reviewed by clinic staff during clinic hours prior to filing.

Group Workshops will be offered each month and will be about 30 minutes in length. These Workshops will review the entire Restraining Order Process or the Unlawful Detainer Process.

2d. Language Access

Briefly describe what languages will be offered, how language services will be offered, and the language capabilities among project staff. (250 word limit)

In addition to some bilingual staff, the kiosks will be developed with language accessibility. EL&A contracts with a service to provide translation for clients who speak languages other than English and Spanish.

Additionally, one EL&A staff member is bilingual and will be available to assist project participants on an ongoing basis. Other EL&A staff members will assist with translation of materials as needed.



2e. Coordination Efforts

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

EL&A is an experienced provider in the region and collaborates with and refers to numerous non-legal providers serving low-income and older adult populations. EL&A is the only nonprofit legal services provider with a physical presence in Imperial County that assists with Restraining Orders. There are two non-legal providers who can provide some assistance to petitioners of Restraining Orders. These providers are located outside of the Courthouse and do not have an attorney on staff.

2f. Proposed Services

Project goals include:

Individual Services: Clinic participants will have the opportunity for detailed individual questions answered and documents reviewed or prepared. This may include the use of guided navigation via our kiosk with individual review of the documents before filing. Goal includes 144 individuals per grant period.

Clinic: All walk-in participants will have access to resources to resolve their restraining order or unlawful detainer issue, including a binder with sample documents. Project staff will answer procedural questions and give general guidance. Goal includes 73 clinics per year.

Workshop: A presentation including restraining order or unlawful detainer options, procedures, and best practices will be presented. General questions will be answered. Goal includes 12 workshops per grant period.

2.f.1. Individual Services

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

144



Describe the format and how often these services will be provided. (250 word limit)

Individual participants will be assisted using a walk-in model. For Elder Abuse Restraining Orders, Kiosks will provide information and facilitate the individualized completion of the required forms. All documents generated by the kiosk will be reviewed by project staff. Individual-specific questions will also be answered by project staff. For all other restraining orders and unlawful detainers, project staff will review documents, assist with the preparation of documents, and answer individual-specific questions as needed.

Project staff will continue to evaluate the success of the kiosk and may consider adding additional forms as time, resources, and participation warrants.

2.f.2. Workshops

Total number of workshops planned:

12

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

12

A PowerPoint presentation will be shown to workshop attendees. EL&A will initially offer both a zoom-type format with remote access as well as an in-person option. Depending on success, ELA will continue both options or use only the more successful option.

2.f.3. Self-Help Clinics

Total number of clinics planned:

73



50

The clinics will be held using a walk-in model. Participants will be assisted in a group-setting. Sample forms, explanations, and resources will be available for participant use. Project staff will be available to answer procedural questions and give guidance.

Information on Legal Options	Yes	Yes	Yes
Information on Court Procedures and Hearing	Yes	Yes	Yes
Document Preparation and Review	Yes	Yes	Yes
Filing or Services Assistance	Yes	No	Yes
Supervised Settlement Services	No	No	No
Post-Hearing Assistance	Yes	Yes	Yes
Other	No	No	No

2.f.5. Other Services

Participants who come in with issues unrelated to clinic topics will be referred to appropriate resources.

2.f.6. Total number of individuals to be served (auto-calculated)

Click "Save & Finish" later to view the current total.

206



3. Administration

3a. Grant Year Timetable

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

Q1 (January-March): Clinic: All walk-in participants to access resources to resolve their restraining order or unlawful detainer issue. Goal includes 18 clinics during Quarter 1.
(250 word limit)

Workshop: A presentation including restraining order and unlawful detainer options, procedures, and best practices will be available for in-person or remote access. Goal includes 3 workshop during Quarter 1.

Individual Services: Clinic participants will have documents created, documents reviewed, and questions answered on an individual basis. Goal includes 36 participants during Quarter 1.

Q2 (April-June): Clinic: All walk-in participants to access resources to resolve their restraining order or unlawful detainer issue. Goal includes 19 clinics during Quarter 2.
(250 word limit)

Workshop: A presentation including restraining order and unlawful detainer options, procedures, and best practices will be available for in-person or remote access. Goal includes 3 workshop during Quarter 2.

Individual Services: Clinic participants will have documents created, documents reviewed, and questions answered on an individual basis. Goal includes 36 participants during Quarter 2.



Q3 (July-September): Clinic: All walk-in participants to access resources to resolve their restraining order or unlawful detainer issue. Goal includes 18 clinics during Quarter 3.

(250 word limit)

Workshop: A presentation including restraining order and unlawful detainer options, procedures, and best practices will be available for in-person or remote access. Goal includes 3 workshop during Quarter 3.

Individual Services: Clinic participants will have documents created, documents reviewed, and questions answered on an individual basis. Goal includes 36 participants during Quarter 3.

Q4 (October-December): Clinic: All walk-in participants to access resources to resolve their restraining order or unlawful detainer issue. Goal includes 18 clinics during Quarter 4.

(250 word limit)

Workshop: A presentation including restraining order and unlawful detainer options, procedures, and best practices will be available for in-person or remote access. Goal includes 3 workshop during Quarter 4.

Individual Services: Clinic participants will have documents created, documents reviewed, and questions answered on an individual basis. Goal includes 36 participants during Quarter 4.

3b. Outreach & Community Engagement



3.b.1. Outreach

EL&A will continue to participate in in-person community education and outreach events as part of their legal services programs and will offer information about the clinic through those events. The Imperial County Superior Court's Access Center will have information available about project services, as will the civil court clerks, and both will act as referral sources. Project partners will work together to prepare and disseminate outreach materials during the year.

EL&A will contact government agencies and community service providers in the region to inform them about project services which are available to their clients, and to request that they assist in publicizing the availability of project services. Court personnel will be aware of clinic services and can give details to self-represented litigants about how and when the project operates. As a project partner, it is anticipated that they will direct potential clients to the project. Materials will be updated to reflect changes in the law and to address repetitive issues raised by project participants.

3.b.2. Outreach Resources

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

As laws and regulations affecting restraining order and unlawful detainer litigants change during the grant year, the project will create new handouts for participants and project staff and update kiosk form functionality.



3c. Staffing

Identify key personnel involved in staffing and supervising this project. Describe how supervision will be provided, for example, onsite or remotely. (250 word limit)

Elder Law & Advocacy's Imperial County attorney, Jennifer Conklin, will act as lead attorney for the project. This attorney will act as supervisor for the Imperial County for Project staff and volunteers. EL&A's Imperial County bilingual staff member, Raquel Camacho, will provide support for the clinic and will aid with translations.

Supervisory Structure: EL&A's Executive Director, Jaime Levine, will provide periodic supervisory in-person visits to observe operations and will also provide oversight and recommendations. Jenna MacRae, Supervising Attorney/Director of Fund & Program Development, will also assist in supervision.

Project staff will meet regularly during the project year with the Court representatives to review project operations and evaluation results, to ensure high quality services and to adjust as needed.

3d. Supervision of Volunteers

Describe if any volunteers will be utilized for this project and how they will be supervised. (250 word limit)

The project is designed to operate without volunteers because they have been difficult to recruit in the past, however it will continue to recruit and train attorney, law student and community volunteers for the project. Additionally, the remote capability of this technology will facilitate additional volunteer availability. Volunteers will assist with project operations and various activities such as preparation of project materials to be used by participants, legal research, and translations when appropriate. Volunteers are trained by project staff, and direct supervision will be provided by the lead attorney.



3e. Pro Se Document Review

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

The project will maintain two kiosks for the use of project participants and project staff. The equipment will be used to generate forms for restraining order matters. Kiosk questions, as well as project staff and volunteers, will assist participants in selecting the correct forms and documents and with the preparation of those forms. During project hours, project attorneys will be available to review all forms and documents (whether prepared by the kiosk or otherwise) prior to filing to make sure they are complete and correct and will respond to participants' legal questions.

Some participants may complete documents without the kiosk. Up to date samples will be available for all of project participants. Additionally, project staff will be available to review and/or assist with completion of documents on an individual basis.

Document review will remain primarily during the set clinic hours.

Participants may also bring in documents to the clinic for project staff to review in order to determine the appropriate options for the participant.

3f. Sub-Grants

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

n/a



3g. Eligibility for Services

Identify all criteria and guidelines used to establish eligibility for services and how the project screens for eligibility for services. (250 word limit)

Participants must be residents of Imperial County and have a current or potential restraining order or unlawful detainer matter. They must be willing to sign the project's disclosures and conditions notice document which will include items such as project limitations, time constraints for elder abuse actions, and no attorney-client relationships are formed. Potential participants are required to fill in a detailed intake form when they arrive at the clinic or at a kiosk. Kiosk or staff review the form to determine whether the person qualifies for services and whether their matter is suitable for clinic assistance. If they do not qualify, they are given resources, and if appropriate, referrals that pertain to their particular circumstances.

All participants must be 60+ years old. If clinic capacity remains low, services may be expanded to include litigants under 60 whose income is 200 percent or less of the current poverty threshold established by the United States Office of Management and Budget or who are eligible for Supplemental Security Income or free services under the Older Americans Act or Developmentally Disabled Assistance Act.

3h. Will this project serve non-indigent persons?

☐ Yes

☒ No

3i. Referrals

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

Ineligible self-represented litigants will be offered clinic resource materials, including citations to online resources, may also be directed to the law library located within the courthouse and may be given information to contact lawyer referral service organizations or other community organizations. We will also endeavor to refer to local attorneys and the California Courts website.



3j. Attorney-Client Relationship

Will this project establish an attorney-client relationship? If yes, describe how project staff will check for conflicts, and how individuals will be served if a conflict is identified. If no, explain how litigants will be made aware of the scope of services to be provided and that no attorney-client relationship will be established. (250 word limit)

No.

3k. Impartiality of the Court

Will this project serve only one party or side of a matter? If yes, identify which party(ies) will be served and why this project has established this service model. If only one side is served, describe how the project will ensure the court's impartiality. (250 word limit)

No.

4. Continuity Planning

4a. Describe plans to obtain funding that will sustain this project's services beyond the Partnership Grant term. (250 word limit)

EL&A continues to seek funding through a variety of approaches including using the services of a professional grant writer who is responsible for researching potential funders and submitting proposals to local and regional foundations. EL&A also solicits donations from legal services clients within contract and grant guidelines and generates revenue through litigation. Historically, this funding has been applied to under-funded legal services programs in both San Diego and Imperial Counties. Resources permitting, a portion of this funding will be applied to the clinic to continue services in this especially underserved region. EL&A continues to support the project by allocating some of its indirect costs and other resources to the project and will continue to do so as it searches for continuation funding after Partnership Grant support has ended.



4b. List all funding sources that have been explored or pursued for this project in the last twelve months.

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

EL&A regularly pursues foundation and government grants. EL&A has found that obtaining support for this rural region generally is difficult. State Bar funding has enabled previous Partnership projects to serve participants who reside in a rural/frontier region which is significantly underserved. State Bar support is critical for this project.

4c. Other Efforts

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

This project will recruit volunteers to assist with clinic operations.

5. Evaluation

5a. Project Services

5.a.1. Copy of Partnership Grant Evaluation

Upload a copy of your most recent Partnership Grant Evaluation

Elder_Law__Advocacy_Report_(1).pdf
134.2 KB - 04/25/2024 6:12PM

Total Files: 1



5.a.2. Existing Project Updates

For existing projects, provide a brief summary of services provided in the current year with any relevant highlights, benchmarks, challenges, etc. What changes have been made to the project over the past year, and what changes are anticipated in the upcoming grant year? (250 word limit)

EL&A has been working to create a new Elder Abuse Clinic for 2023.

Challenge: The number of participants has been low, despite the Court's statement of need for assistance with restraining orders.

Change: For 2024, the Court has asked us to increase the clinic services to include Civil Harassment and Domestic Violence Restraining Orders, which we did. Numbers continued to be low. Noticing the continued request for assistance with Unlawful Detainers, and the often related-nature in background circumstances (e.g. the "accidental" landlord that is being taken advantage of by a tenant) we expanded the clinic to include this as well.

5b. Satisfaction Surveys

5.b.1. Copy of Satisfaction Survey

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

2025_Partnership_Survey.pdf
123.1 KB - 04/25/2024 6:14PM

Total Files: 1



5.b.2. Survey Distribution & Analysis

Project participants will be encouraged to fill in a client satisfaction questionnaire survey at the time they attend a clinic session. The surveys, provided in both English and Spanish, will measure overall satisfaction with services, perception of treatment by clinic staff, how much they learned about elder abuse or unlawful detainer law, whether they felt better prepared to handle their matter in pro per as a result of clinic participation, etc.

Survey results will be reviewed by project staff. Revisions to clinic policies and procedures will be considered and implemented as indicated. A formal written complaint procedure will also be made available to clinic participants. Survey results and any complaints will be considered by the partners to improve and enhance clinic operations.

5c. Additional Evaluation Methodology

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

The project staff will also collect quantitative data on a monthly basis which will provide the total number of participants served, as well as the types of services provided and materials distributed. This information will allow the project to track its success in meeting target numeric goals for the various services offered, and adjust staffing, hours, etc. as indicated.

Project staff and supervisors will meet bimonthly to assess the progress made to date on project goals, any issues in clinic operations which have been identified by clients or partners, ideas for improving services, and will create action plans when indicated. When an action plan is created, project staff and supervisors will review and document progress made to date, as well as discuss any outstanding or new issues at the next scheduled meeting. The process will be repeated for each bimonthly operations meeting. Results will also be used to create changes in the design and operation of both current and future clinic projects.



5d. Court Evaluation

Describe the court's role in evaluating this project. (250 word limit)

Court staff will be provided a survey to determine whether the clinic has streamlined the self-represented litigant process for court personnel and to reveal any new issues which may have arisen. Revisions to clinic policies and procedures will be considered and implemented as indicated.

Form C - Proposed Project Budget

Program Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total	Narrative
1. Lawyers	\$41,900	\$0	\$0	\$41,900	A FTE of .05 is budgeted for the executive director/supervising attorney who will provide supervision and oversight of project related activities. A FTE of .02 is budgeted for the director of legal services who will supervise the staff providing project related services. A FTE of .40 is budgeted for the lead attorney to perform the duties as described in the project.
2. Paralegals	\$0	\$0	\$0	\$0	



3. Other Staff	\$11,600	\$0	\$0	\$11,600	A FTE of .25 is budgeted for a program assistant to provide administrative support and bilingual services for project related activities.
4. SUBTOTAL	\$53,500	\$0	\$0	\$53,500	
5. Employee Benefits	\$9,300	\$0	\$0	\$9,300	Employer payroll taxes, health care, workers compensation and retirement costs are based on projected costs for the positions listed above.
6. TOTAL PROGRAM PERSONNEL	\$62,800	\$0	\$0	\$62,800	

Program Non-Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total	Narrative
7. Space	\$2,300	\$0	\$0	\$2,300	Rent to the State and Courthouse for the Imperial County-based staff. Approximately 1/3 of the space costs are allocated to each of the three main legal services programs offered at our Imperial County office.



8. Equipment Rental and Maintenance	\$400	\$0	\$0	\$400	Includes equipment/copier leases and maintenance based on estimated allocation of the project's FTE vs Organization-wide FTE. (Approximately 3%).
9. Office Supplies	\$200	\$0	\$0	\$200	Includes general office supplies based on estimated allocation of the project's FTE vs Organization-wide FTE. (Approximately 3%).
10. Printing and Postage	\$1,200	\$0	\$0	\$1,200	Includes printed materials/information for the project as well as general printing & postage costs on the estimated allocation of the project's FTE vs Organization-wide FTE. (Approximately 3%).
11. Telecommunications	\$1,000	\$0	\$0	\$1,000	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 3%).



					Includes annual licensing and maintenance costs for on-site terminals, annual upgrades to forms, and costs for updating documents generated by kiosks. Also includes general technology costs based on the estimated allocation of the project's FTE vs Organization-wide FTE. (Approximately 3%).
12. Technology	\$5,200	\$0	\$0	\$5,200	
13. Program Travel	\$600	\$0	\$0	\$600	Includes travel costs for attorneys and program assistant.
14. Training	\$100	\$0	\$0	\$100	Includes annual training for attorney.
15. Library	\$100	\$0	\$0	\$100	Includes library related costs based on the project's estimated FTE vs Organization-wide FTE. (Approximately 3%).
16. Insurance	\$0	\$0	\$0	\$0	
17. Evaluation	\$0	\$0	\$0	\$0	
18. Contract Service to Clients	\$0	\$0	\$0	\$0	



19. Other	\$400	\$0	\$0	\$400	Includes membership fees and misc costs based on the allocation of the project's estimated FTE vs Organization-wide FTE. (Approximately 3%).
20. TOTAL PROGRAM NON-PERSONNEL	\$11,500	\$0	\$0	\$11,500	
TOTAL PROGRAM	\$74,300	\$0	\$0	\$74,300	
Administrative and Overhead					Narrative
21. Admin Personnel	\$4,100	\$0	\$0	\$4,100	Includes finance, reception, and general management salary and wages based on the allocation of the project's estimated FTE vs Organization-wide FTE. (Approximately 3%).
22. Admin Non-Personnel	\$5,400	\$0	\$0	\$5,400	Includes insurance 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 3%).
TOTAL ADMINISTRATIVE	\$9,500	\$0	\$0	\$9,500	
TOTAL AMOUNT OF FUNDS	\$83,800	\$0	\$0	\$83,800	



1. Lawyers

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Staff Attorney	0.40	0.00	0.00	0.40
Executive Director / Supervising Attorney	0.05	0.00	0.00	0.05
Director of Legal Services	0.02	0.00	0.00	0.02
TOTAL LAWYERS	0.47	0.00	0.00	0.47

2. Paralegals

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

3. Other Staff

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Program Assistant	0.25	0.00	0.00	0.25
	0.00	0.00	0.00	0.00
TOTAL OTHER STAFF	0.25	0.00	0.00	0.25
TOTAL PERSONNEL (in FTEs)	0.72	0.00	0.00	0.72

Form D - Project Assurances

Download the Assurances document and upload a signed copy below.



**Upload PDF Version of
Signed Assurances
Document:**

ELA_2025_Partnership.pdf
94.4 KB - 05/06/2024 12:55PM

Total Files: 1

Form E - Agreement of the Partner Court

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

**1. Upload Letter(s) of
Support:**

Letter_of_Support.pdf
292.6 KB - 05/07/2024 6:11PM

Total Files: 1

2. Upload MOU(s):

Refer to application
instructions for MOU
requirements.

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).

Staff Review

2023 Partnership Grant Evaluation

Grant Type:	Partnership Grants		
Evaluation Year:	2023	Partnership Grant Project:	Imperial County Elder Abuse Technology Project
Partnership Grant Award Amount:	\$105,000		

Form A - Expenditures

Use this form to report on expenditures for the entire grant period.

Organizations who received 2023 Partnership Grants will need to report January 1, 2023-December 31, 2023 expenditures. Organizations who received new PG 2.0 grants will need to report April 1, 2022-December 31, 2023 expenditures. Note that the "April 1,2022-June 30, 2022 Expenditures" column is for reference only and reflects amounts reported in the 2022 Partnership Grant evaluation.

Personnel

Account Title	Approved Budget	April 1, 2022-December 31, 2022 Expenditures (PG 2.0 Only)	January 1, 2023-December 31, 2023 Expenditures	Total Grant Expenditures	Unspent Funds
1. Lawyers	\$32,000	\$0	\$31,280	\$31,280	\$720
2. Paralegals	\$0	\$0	\$0	\$0	\$0
3. Other Staff	\$7,890	\$0	\$13,858	\$13,858	(\$5,968)
4. SUBTOTAL	\$39,890	\$0	\$45,138	\$45,138	(\$5,248)
5. Employee Benefits	\$7,000	\$0	\$9,865	\$9,865	(\$2,865)
6.TOTAL PERSONNEL	\$46,890	\$0	\$55,003	\$55,003	(\$8,113)

Non-Personnel

Account Title	Approved Budget	April 1, 2022-December 31, 2022 Expenditures (PG 2.0	January 1, 2023-December 31, 2023 Expenditures	Total Grant Expenditures	Unspent Funds
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		Only)			
7. Space	\$0	\$0	\$2,374	\$2,374	(\$2,374)
8. Equipment Rental and Maintenance	\$250	\$0	\$114	\$114	\$136
9. Office Supplies	\$40	\$0	\$279	\$279	(\$239)
10. Printing and Postage	\$570	\$0	\$179	\$179	\$391
11. Telecommunications	\$975	\$0	\$454	\$454	\$521
12. Technology	\$48,040	\$0	\$5,824	\$5,824	\$42,216
13. Program Travel	\$920	\$0	\$718	\$718	\$202
14. Training	\$0	\$0	\$0	\$0	\$0
15. Library	\$120	\$0	\$18	\$18	\$102
16. Insurance	\$0	\$0	\$0	\$0	\$0
17. Evaluation	\$0	\$0	\$0	\$0	\$0
18. Contract Service to Clients	\$0	\$0	\$0	\$0	\$0
19. Other	\$0	\$0	\$479	\$479	(\$479)
20. TOTAL NON-PERSONNEL	\$50,915	\$0	\$10,439	\$10,439	\$40,476
ADMINISTRATIVE AND OVERHEAD	Approved Budget	April 1, 2022- December 31, 2022 Expenditures (PG 2.0 Only)	January 1, 2023- December 31, 2023 Expenditures	Total Grant Expenditures	Unspent Funds
21. Admin Personnel	\$4,676	\$0	\$2,834	\$2,834	\$1,842
22. Admin Non-Personnel	\$2,519	\$0	\$4,825	\$4,825	(\$2,306)
TOTAL ADMINISTRATIVE	\$7,195	\$0	\$7,659	\$7,659	(\$464)
TOTAL AMOUNT OF FUNDS	\$105,000	\$0	\$73,101	\$73,101	\$31,899

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

This includes whether you have any unspent funds or if any of the line items deviate from your "Approved Budget" column.

In choosing a different technology option for the public stations, we saved money on the technology portion of the budget. The staff portion of the budget increased though, as it required more staff time to manage and supervise the project than originally anticipated - and we decided to increase the lead attorney time at the Court Clinic. With the budget revision, we also allocated space costs to the project, which the original budget was unable to accommodate - but are a cost of the project.

If yes, please explain

We 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 carrying over 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.

2.a. Amount approved for carryover: \$31,899

The deadline to submit budget revisions and/or carryover requests is January 31, 2024. Grantees with approved carryovers are permitted to spend remaining grant monies for a period of six-months (through June 30, 2024). Following the spenddown period, grantees will also need to complete and submit a Partnership Grant Addendum to report on carryover monies spent.

Grantees with without an approved carryover must return unspent grant funds to the State Bar.

Form B - Activities

Explain "Other": Elder Abuse

2. Demographics

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

Select all that apply.

Limited English Proficiency, Rural, Seniors

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

Select all that apply.

Spanish

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

Select all that apply.

☒ Bilingual staff/volunteers (Spanish)

☐ Bilingual staff/volunteers (languages other than Spanish)

☐ Multilingual staff/volunteers (if not included above)

☐ Interpreters

☐ Translation Service

☐ Other

☐ N/A

Please indicate the number of bilingual (Spanish) staff/volunteers, position(s), FTE(s) and if funded by Partnership Grant funds. ELA had approximately 7 FTE bilingual staff during the 2023 grant period. The Partnership Grant provides partial funding.

2.c. Was there a need for services in additional languages beyond those that the project was able to provide? If so, which ones?
No.

3. Litigant Assistance

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

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

Partnership Grant Pro Rata Calculation (Part 1)

Goals and Actuals (Part 2)

3.a. Goals and Actuals

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

Goals and Actuals			
	Goal (Full grant period)	Actual (Reporting period)	Pro Rata (Reporting period)
Total Number of Workshops provided	12	11	11
Total Number of Individuals served	60	17	17
Total Number of Individuals who received one-on-one services (not including family members and others impacted)	195	40	40

3.b. Were all goals met?: ☐ Yes
☒ No

1. Goal for total number of workshops provided annually:	12	Actual total number of workshops provided annually:
2. Goal for total number of individuals served through workshops annually:		Actual total number of individuals served through workshops annually:
3. Goal for total number of individuals who received one-on-one services annually (Not including family members and others impacted):	195	Actual total number of individuals who received one-on-one services annually:

3.c. If goals were not met, explain why: 96 clinics were provided, well exceeding this goal. Despite the availability of the clinic, the total number of unique individuals served overall was 40. Although the Court had indicated a need for this program, the initial number of participants was low. As a result, EL&A increased our outreach and opened the clinic to additional types of restraining order participants. The 40 participants included in this number does not include the return visits to the clinic for follow-up assistance or represent the multiple documents that are were prepared. 12 participants came into the clinic multiple times with an additional 15 visits. Despite staffing changes and an offering of workshops to local nonprofits in addition to in-house workshops, 11 workshops were provided, one short of the goal.

Services Provided			Actual	
Group-Setting Services	# of Workshops	Pro Rata	# of Individuals	Pro Rata
Information on Substantive Legal Options	11	11.00	17	17.00
Information on General Court Processes and Procedure	11	11.00	17	17.00
Document Preparation or Review	11	11.00	17	17.00
Trial/Hearing Preparation	11	11.00	17	17.00
Other	0	0.00	0	0.00

Individually-Delivered (one-on-one) Services	# of Individuals	Pro Rata
Information on Substantive Legal Options	40	40.00
Information on General Court Processes and Procedure	40	40.00
Document Preparation or Review	36	36.00
Filing Assistance	36	36.00
Mediation/Settlement Assistance	0	0.00
Trial/Hearing Preparation	36	36.00

Post-Trial/Hearing Assistance	36	36.00
Other	48	48.00

Explain "Other":

Other services include information about how to keep a log of incidents (29) how to obtain a police report or information about possible referrals (19).

4. Referrals

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

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

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

Select all that apply.

Other

Explain "Other":

Although 4 individuals were provided the Lawyer Referral Service information, all 4 participants did not pursue a private attorney and continued to receive assistance through the clinic.

5. Resource Materials

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

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

ELA_Partnership_Handouts.pdf 2.3 MB - 03/05/2024 3:12PM

Total Files: 1

5.b. Briefly describe each resource material.

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

EARO Clinic Intake in English and Spanish for clinic participants. This material was created and given to each participant to complete. (40)

The Elder Abuse Trifold in English and Spanish was also revised and distributed to each participant. It was also distributed at community education events. (40)

The EARO Flyer in English and Spanish was revised for the clinic and distributed at our office to clients and walk ins interested in clinic services as well as at community education events. (40+)

The Workshop Power Point presentation was created and presented at the workshops. (17)

Clinic staff worked to create a kiosk to eventually allow remote participation for potential litigants. This involved creating online fillable intake and court documents that the participants can access as well as creating a physical "kiosk" for accessibility.

6. COVID-19

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

Select all that apply.

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

Form C - Evaluation

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

Select all that apply.

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

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

Project lead attorney, Javier Garcia, left EL&A in mid-February 2023. San Diego based attorneys were able to continue the clinic in absence of an Imperial-based attorney both in-person and remotely with the help of our program assistant. Although we did not close the clinic, this staffing issue did impact our ability to kick-off the clinic during those first few months as would have been possible with a dedicated lead attorney. EL&A was able to hire attorney, Jennifer Conklin, to assume the primary role in this clinic in March, 2023.

Upon request by the Court, and due to low initial participant numbers, EL&A opened the clinic to participants requesting or responding to other types of Restraining Orders, including Civil Harassment and Domestic Violence to qualifying participants.

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

Evaluations indicated that 54.6% of participants who responded indicated an increased level of knowledge by visiting the clinic.

Return visits to the clinic by participants also demonstrates the numerous hurdles to filing and obtaining an Elder Abuse Restraining Order which may not be completed without additional and repeated guidance.

4. Satisfaction Surveys

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

Elder_Abuse_Technology_Survey_2023.pdf

131.9 KB - 03/04/2024 6:43PM

Total Files: 1

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

40

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

11

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

Participants were called to answer survey questions over the phone. Participants who were unable to provide feedback over the phone, were mailed a survey. Of those that provided feedback, all responded that the attorney or clinic staff were knowledgeable and courteous. 91% stated that they would refer the clinic to a friend. Survey comments included "Very professional." "Wonderful." "Everything was good" and "It was a job well done." Although one participant stated that she was unsatisfied with her judgement, she also indicated that the clinic staff were knowledgeable, courteous, and willing to answer questions or explain issues.

5. Court Partnership

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

Elder Law & Advocacy's office located within the court has allowed the court and clinic staff to see each other on a daily basis.

These relationships have benefited self represented litigants because the attorneys can contact court staff directly for information and clarification.

Furthermore, any modifications for the venue of the clinic were promptly communicated by courthouse staff to the clinic staff, which allowed sufficient alternate venue options, within the courthouse, to be offered and sufficiently relayed to all participants attending that day's clinic.

Overall, there was excellent communication between the courthouse staff and clinic staff.

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

Quarterly meetings were held via zoom. Due to staffing issues, the first meeting was held on May 10th, 2023. Three additional formal quarterly Partnership meetings were held on the following dates; June 26, 2023, September 25th, 2023, and December 11th, 2023 via zoom. Attendees at all four (4) meetings included Elder Law & Advocacy staff (lead attorney, legal assistant, Attorney/Director of Fund & Program Development, and Executive Director) and Court supervising staff. The meetings focused on Court procedures and form preferences, clinic hours and eligibility, and appropriate referrals for related but separate legal issues.

6. Additional Evaluation Method

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

Project staff and supervisors meet two – four times a month to assess the progress made to date on project goals, any issues in clinic operations which have been identified by clients or partners, ideas for improving services, and have created actions plans as necessary. Progress, hurdles, and planning of creating kiosks for the work are also discussed.

The clinic also meets with Court staff, both informally and formally, to learn of any issues that the Court may see that can be addressed.

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

(For Reference) Prior Reported Expenditures

Reported Expenditures from the 2022 Evaluation Reported Expenditures from the 2023 Evaluation

Other Evaluation Materials (Optional)

1. Demographics

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



Elder Abuse Technology Project - Client Satisfaction Survey

Please take a few minutes to tell us how we're doing. We appreciate your feedback!

Date:		Name: (optional)	
Did you watch the presentation?		Do you know more about restraining orders or unlawful detainers after visiting the clinic?	Was the attorney or clinic staff:
YES	NO	5- Yes, I learned a lot!	Knowledgeable
Did you get one-on-one assistance?		4- I learned a great deal.	Courteous
YES	NO	3- I learned some	Willing to answer questions or explain issues
I am a (Circle one below)		2- I learned a little bit	Were you satisfied with this service?
Restraining Order Petitioner		1- I did not learn anything	YES NO
Restraining Order Respondent			Would you refer a friend to the clinic?
Landlord			YES NO
Tenant			
Other			
Before visiting the clinic, how much did you know about restraining orders?		Did the attorney or clinic staff:	Comments/Suggestions:
1 – Nothing/Didn't know anything		Clearly explain your issue?	
2- Knew a little bit		Prepare you to handle your matter yourself?	
3 – Knew some		Review documents or other papers?	
4 – Knew a great deal		Prepare or assist with legal document(s)?	
5- Knew a lot – I'm an expert!		Refer you to other resources?	

PARTNERSHIP GRANTS 2025 PROJECT ASSURANCES

Program Name: Elder Law & Advocacy

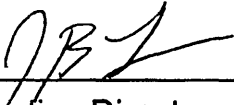
Project Title: Imperial County Restraining Order and Unlawful Detainer Clinic

Applicant assures compliance with the following:

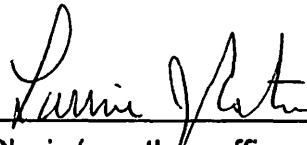
1. Applicant agrees it will use any grant funds it receives from the Partnership Grants portion of the Equal Access Fund only for purposes allowed under the State Budget Act, upon approval thereof, and any grant agreement it enters into with the State Bar of California.
2. Applicant agrees to expend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

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

Signed:



Executive Director
Elder Law & Advocacy



Chair (or other officer), Board of Directors
Elder Law & Advocacy

Jaime Levine

Print Name

LAURIE J CATRON

Print Name and Title

Date: May 2, 2024

Date: May 6, 2024

Application Summary

Funding Opportunity: Partnership Grants
Project Title: Imperial County Restraining Order and Unlawful Detainer Clinic
Organization: Elder Law & Advocacy

Partner Court Information

Presiding Judge	Marco Nunez
Court Name	Imperial County Superior Court
Address	939 West Main Street
City	El Centro
Country / Province	United States CA
Postal Code	92243
Court Phone	760-482-2255 2250 -RG

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

1. Project Abstract:
- The Imperial County Restraining Order and Unlawful Detainer Clinic is intended to serve older adult self-represented litigants, including those who are limited or non-English speakers, and offer services at the central Imperial County Superior Court. The goal for each participant is that they will be able to gain legal information regarding Restraining Orders or Unlawful Detainers, depending on what is appropriate for their situation, and successfully complete the necessary paperwork to submit a request and/or answer. The project will be an expansion of the 2023 and 2024 Partnership Clinic which created two Restraining Order kiosks located within the Imperial County Courthouse. Along with staff, the kiosks will guide eligible participants through the process of a restraining order in a step-by-step manner in order to facilitate accurate completion of the required forms. Elder Law & Advocacy (EL&A) will work to serve residents of this geographically large, diverse, and underserved county. Meetings between EL&A and the Court will consist of in-depth discussions of matters concerning ongoing clinic operations and will result in changes where indicated.
2. Attorney-Client Relationship: I understand and agree to the applicant's description of whether or not an attorney-client relationship will be established. If yes, project staff will check for conflicts and identify how individuals will be served if a conflict exists as described below. If no, litigants will be made aware of the scope of services to be provided and that no attorney-client relationship will be established in the manner described below.:

Application Summary

Funding Opportunity: Partnership Grants
Project Title: Imperial County Restraining Order and Unlawful Detainer Clinic
Organization: Elder Law & Advocacy

No.
3. Impartiality of the court: I understand and agree to the applicant's description of whether the project will serve only one party or side of a matter. If yes, the project will take the following steps to explore all implications of the decision and to address any risk of impropriety on the court's part as described below. If no, and both parties or sides will be served, no additional information is required.
No.
4. Alternative Services: The applicant has described the methods to be used to screen for subject matter eligibility, and the information and referral options that will be available for litigants who are ineligible for services due to income, subject matter, or residency:
Ineligible self-represented litigants will be offered clinic resource materials, including citations to online resources, may also be directed to the law library located within the courthouse and may be given information to contact lawyer referral service organizations or other community organizations. We will also endeavor to refer to local attorneys and the California Courts website.
5. Memorandum of Understanding: I understand that, if the project is funded, the court and the applicant will memorialize the details of the partnership in a Memorandum of Understanding(MOU), which will reflect the depth of the partnership, including the respective areas of responsibility of the Court and the applicant, as well as plans for regular coordination meetings.
Status of MOU:
A fully executed MOU will be provided to the State Bar of California before the beginning of the grant year.
6. Additional Comments, if any:

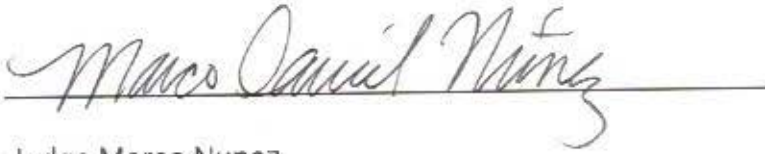
Application Summary

Funding Opportunity: Partnership Grants

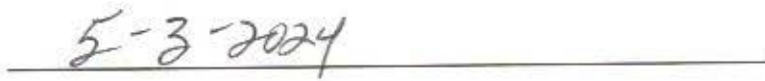
Project Title: Imperial County Restraining Order and Unlawful Detainer Clinic

Organization: Elder Law & Advocacy

Signature of Presiding Judge

A handwritten signature in cursive script, appearing to read "Marco Daniel Nunez", is written over a horizontal line.

Judge Marco Nunez

A handwritten date "5-3-2024" is written over a horizontal line.

Date



Grant Year: 2025

Due Date: May 9, 2024 5:00pm PT

Prepared by: Danita Melton

Email: dmelton@gbla.org

Contact Phone: 661-334-4669

Funding Opportunity: Partnership Grants

Project Title: Partnership Shriver Grant

Program Name: Greater Bakersfield Legal Assistance

Applicant Title: Director of Grant Acquisitions & Management

Address: 615 California Avenue

City: Bakersfield

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

Form A - Project Profile

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

1. Application Contact: Danita Melton

Job Title: Director of Grant Acquisitions & Management

Email: dmelton@gbla.org

Telephone: 661-334-4669

2. Total Amount Requested: \$107,300

Request project amounts divisible evenly by \$100.



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

County(ies) Served by this Project

Kern

4. Substantive Area(s)

Housing

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

If yes, for how many years? Describe any significant changes since the project's inception or anticipated changes.

No.



6. Project Abstract

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

Greater Bakersfield Legal Assistance, Inc. (GBLA) and Kern County Superior Court (Court) respectfully request funding to support the Sargent Shriver Civil Counsel Act Pilot Project (Project) in Kern County California. The purpose of this Project is to provide legal representation in civil matters in housing-related matters and improve court procedures and services for low-income litigants. Through this grant we propose to continue to assist low-income tenants with the daunting task of responding to and steering through the unlawful detainer action process. GBLA's focus is not just on assisting those we believe to be the most vulnerable, but also to assist the Court by finding ways to maximize judicial economy. To this end, the Court will continue its implemented pre-trial Mandatory Settlement Conference requirement in unlawful detainer actions.

Initial intake is conducted at the Landlord Tenant Assistance Center (LTAC) located inside the Courthouse (near the UD Courtroom) in Bakersfield-Metropolitan Division, Kern County. Here, individuals are screened for eligibility and conflicts, and provided with case assessment and direction. Cases are evaluated for an array of services including (1) brief counsel and advice; (2) direct legal representation; (3) pro per assistance; (4) participation in Early Dispute Resolution; and (5) linkages to social services. The Shriver Partnership grant will support the Pro Se assistance component.

Located at LTAC, GBLA's Intake & Assessment Advocate is the first point of contact and provides eligibility and conflict screening. This position also provides eligible clients with meaningful linkages to an array of supportive social services and resources designed to help move them to greater self-sufficiency. The Intake & Assessment Advocate is supervised by the Director of Litigation (or his/her designee). The Director of Litigation (DOL) receives, reviews and assigns the case to the most appropriate attorney. Along with the assignment the receiving advocate is also provided with a recommended litigation strategy for the case. Depending on the DOL's assessment, the case may either be assigned to the attorney handling pro se matters or to one of two Shriver housing attorneys who are available to accept full scale direct representation cases. Only the pro per assistance component will be charged to this Shriver Partnership grant.

Form B - Project Description



1. Court Involvement

1a. Partner Court(s)

Kern County Superior Court
1415 Truxtun Avenue
Bakersfield, CA 93301



1b. Court Involvement

Describe the current/planned coordination and collaboration on this project with the Partner Court identified, including but not limited to:

- Integration with existing court-based services
- Use of facilities and court resources
- Types and frequency of meetings planned
- Any other aspects not described above

(250 word limit)

Initial intake is conducted at the Landlord Tenant Assistance Center (LTAC) located inside the Courthouse (near the UD Courtroom) in Bakersfield-Metropolitan Division, Kern County. Here, individuals are screened for eligibility and conflicts, and provided with case assessment and direction. Cases are evaluated for an array of services including: (1) brief counsel and advice; (2) direct legal representation; (3) pro per assistance; (4) participation in Early Dispute Resolution; and (5) linkages to social services. The Shriver Partnership grant will support the pro per assistance component.

Located at LTAC, GBLA's Intake & Assessment Advocate is the first point of contact and provides eligibility and conflict screening. This position also provides eligible clients with meaningful linkages to an array of supportive social services and resources designed to help move them to greater self-sufficiency. The Intake & Assessment Advocate is supervised by the Director of Litigation (or his/her designee). The Director of Litigation (DOL) receives, reviews and assigns the case to the most appropriate attorney. Along with the assignment the receiving advocate is also provided with a recommended litigation strategy for the case. Depending on the DOL's assessment, the case may either be assigned to the attorney handling pro se matters or to one of two Shriver housing attorneys who are available to accept full scale direct representation cases. Only the pro per assistance component will be charged to this Shriver Partnership grant.

Partner Court	Location of Services	Address	On-Site Days/Hours	Total On-Site Hours/Month
Kern County Superior Court	Bakersfield Metropolitan Division	1415 Truxtun Avenue, Bakersfield, CA 93301	M-F 8:30am-5:00pm	162.50



2. Project Impact



2a. Needs Assessment

Target population(s): Describe the population(s) that your project is designed to help. You may describe a single target population and/or multiples. Describe why the target population is in particular need of the services to be provided. (250 word limit)

With a population of approximately 916,908, Kern County is a county in crisis. Although the national economy is showing signs of a slow recovery, Kern County continues to lag behind the rest of the state and nation. Moreover, with the local housing market and rental rates-coupled with a post-pandemic hardship, the need for housing assistance is great. According to the 2022 U.S. Census Bureau, 18% of individuals in our county live below the 125% poverty level; 21 % of families with children live below the 125% poverty level; 40% of female householders (with children) and no spouse present live below the 125% poverty level; and nearly 25% of individuals over the age of 25 have less than a high school education. Also, according to estimates from the same source, males make up 51 % of the population with females making up 49% of the population. The population over the age of 65 is slightly over 11 %.

According to the Kern County Network for Children, Kern County has one of the youngest counties in the state with 31 % of Kern County children under the age of 6 with slightly over 30% of the child population living below the 125% poverty level in Kern County. Kern County per capita income is \$27,976 (2022). By comparison, the per capita income in California was \$77,339 (2022) for the same time period. Kern County's per capita income was 64% percent below the state per capita income. According to the statistics from the Employment Development Department, Kern County's unemployment rate in March 2024 was 10.1%. During the same period, California's unemployment rate was 5.3%. Average rents are: \$1,161 per month (2022) according to the U.S. Census. Thus, families are paying well over 50% of their gross income for housing and considered cost burdened, often having difficulties meeting other important financial obligations such as transportation, groceries, and medical expenses.

Every three years, GBLA conducts a comprehensive needs assessment to determine the most critical legal needs of the low-income population. The most recent assessment conducted in September of 2023 continues to identify access to decent affordable housing as a top need. According to the 2023 Court Statistics Report by the California Judicial Council, Court records show there were approximately 2,228 Unlawful Detainer filings in 2022. A majority of low-income unrepresented litigants lack the skills to effectively advocate for themselves in the courtroom. This may be due to the lack of education, income, language proficiency and/or some other barriers. Funding under the Sargent Shriver Civil Counsel Act Pilot Project allows the partners of the grant to offer comprehensive legal representation and innovation in an array of housing-related matters. As a result, timely and effective access to justice for the low-income population is greatly improved.



2b. Areas to be served

Describe the geographic area(s) to be served by the project. If you consider this area to be rural or if this project will meet unmet rural needs, please explain why. (250 word limit)

Housed at the main Courthouse located at 1415 Truxtun Avenue, Bakersfield, California, the Shriver Unit, through the Landlord Tenant Assistance Center (LTAC), serves prospective clients who make initial contact with the unit. This covers most of Kern County, except for a section of the Northeast portion. Communities not in this service area are: Lost Hills, Wasco, Shafter, Delano, McFarland, Pond, Woody, and Glennville.

2c. Types of Services to be Provided

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

The Shriver Partnership Project will provide brief counsel and advice, direct representation, self-help assistance, participation in Early Dispute Resolution, and linkages to social services. The Shriver Project will address housing-related issues and ultimately serve to protect litigants from homelessness.

2d. Language Access

Briefly describe what languages will be offered, how language services will be offered, and the language capabilities among project staff. (250 word limit)

The majority of GBLA personnel (including intake personnel) are bilingual and in English and Spanish. Other languages spoken include Mixteco, Arabic, Cantonese, Cambodian (Khmer), and Punjabi.

GBLA also contracts with a limited English proficiency (LEP) service that provides language interpretation and translation services in every language imaginable. The LEP service is utilized when a GBLA staff member is not immediately available to provide language interpretation and/or translation. This service is available to all Project personnel. Additionally, the Court also strives to assign Court personnel associated with the Project who are also bilingual in English and Spanish.



2e. Coordination Efforts

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

The Volunteer Attorney Program of Kern County (VAP) is administered by GBLA in cooperation with the Kern County Bar Association. GBLA's VAP Coordinator recruits, provides support, ongoing training opportunities and supervision to the volunteer attorneys. Volunteer attorneys will provide workshops and other educational resources to eligible tenants through LTAC. The VAP Coordinator will also recruit attorneys to meet with tenants to provide assistance to at least 25 low-income tenants facing eviction from their homes each year. Tenants will sign a limited scope retainer agreement with the understanding that the attorney services are limited in scope and duration.

2f. Proposed Services

The goal for this project is to provide one-on-one services to at least 2,150 tenants. With all 2,150 receiving information on general court processes and procedure - at least 400 will receive information on substantive legal options; at least 400 will receive document preparation or review; at least 1,040 will receive mediation/settlement assistance; and at least 310 will receive assistance with trial/hearing preparation.

2.f.1. Individual Services

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

2150



Describe the format and how often these services will be provided. (250 word limit)

General intake for the Shriver Project will be daily from hours of 8:30 am to 5:00 pm Monday-Friday.

Initial intake is conducted at the Landlord Tenant Assistance Center (LTAC) located inside the Courthouse (near the UD Courtroom) in Bakersfield-Metropolitan Division, Kern County. Here, individuals are screened for eligibility and conflicts, and provided with case assessment and direction. Cases are evaluated for an array of services including: (1) brief counsel and advice; (2) direct legal representation; (3) pro per assistance; (4) participation in Early Dispute Resolution; and (5) linkages to social services. The Shriver Partnership grant will support the pro per assistance component.

Located at LTAC, GBLA's Intake & Assessment Advocate is the first point of contact and provides eligibility and conflict screening. This position also provides eligible clients with meaningful linkages to an array of supportive social services and resources designed to help move them to greater self-sufficiency. The Intake & Assessment Advocate is supervised by the Director of Litigation (or his/her designee). The Director of Litigation (DOL) receives, reviews and assigns the case to the most appropriate attorney. Along with the assignment the receiving advocate is also provided with a recommended litigation strategy for the case. Depending on the DOL's assessment, the case may either be assigned to the attorney handling pro se matters or to one of two Shriver housing attorneys who are available to accept full scale direct representation cases. Only the pro per assistance component will be charged to this Shriver Partnership grant.

2.f.2. Workshops

Total number of workshops planned:

0

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

0

Describe the format and how often these services will be provided. (250 word limit)

Not Applicable.



2.f.3. Self-Help Clinics

Total number of clinics planned:

0

0

Describe the format and how often these services will be provided. (250 word limit)

Not Applicable.

Information on Legal Options	Yes	No	No
Information on Court Procedures and Hearing	Yes	No	No
Document Preparation and Review	Yes	No	No
Filing or Services Assistance	Yes	No	No
Supervised Settlement Services	Yes	No	No
Post-Hearing Assistance	Yes	No	No
Other	No	No	No

2.f.5. Other Services

Describe any "other" services that will be provided. (250 word limit)

Not Applicable.



2.f.6. Total number of individuals to be served (auto-calculated)

2150

3. Administration

3a. Grant Year Timetable

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

Q1 (January-March): Existing housing staff assigned to project and trained on program deliverables, including referral to GBLA's housing workshops.

(250 word limit)

Review statutory, state and local changes to housing law and/or procedures and adjust services accordingly.

Obtain prior year housing statistics from Court to establish a baseline for services.

Existing survey instrument will be modified to serve as project's evaluation component.

Financial expenditure reports will be reviewed and analyzed.

Launch new survey to project participants (participation optional).



Q2 (April-June): Intake process will be reviewed for continuous process improvement (CPI).

(250 word limit)

Conduct review of deliverables, make projections, and adjust accordingly.

Review incoming survey responses from Q1 and adjust as needed.

Financial expenditure reports will be reviewed and analyzed.

Q3 (July-September): Review statutory, state and local changes to housing law and/or procedures and adjust services accordingly.

(250 word limit)

Review incoming survey responses from Q2 and adjust as needed.

Financial expenditure reports will be reviewed and analyzed.

Q4 (October-December): In preparation for final report, review financial expenditures.

(250 word limit)

Review incoming survey responses from Q3 and compile annual responses.

Obtain client statistics and demographics for the project period.

Obtain current year statistics from the Court for project comparison.

3b. Outreach & Community Engagement

3.b.1. Outreach

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

As to the community, GBLA's Marketing & Communications Coordinator will distribute flyers at local events and other collaborative meetings. As to litigants, both GBLA's Intake Assessment Advocate and the Court's Unlawful Detainer (UD) Advisor will reach out to other Court personnel to ensure that everyone knows where LTAC is physically located and that all unlawful detainer litigants filing in the Bakersfield-Metropolitan Division should be referred to LTAC. Additionally, the inclusion of a Mandatory Settlement Conference will allow for a second referral source.



3.b.2. Outreach Resources

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

None.

3c. Staffing

Identify key personnel involved in staffing and supervising this project. Describe how supervision will be provided, for example, onsite or remotely. (250 word limit)

Prior to joining GBLA in 2023, the Intake & Assessment Advocate, Elias Bahena, interned for this office and the Kern County Public Defender's office. As a former Behavior Specialist Assistant Mr. Bahena has extensive experience creating and effecting personalized intervention plans. Supervised by the Director of Litigation for housing, this individual is bilingual (English/Spanish) and has meaningful contacts with many of the social services providers in our community.

Prior to joining GBLA in 2022, the staff attorney handling pro se assistance, El Khazaian, was a former Deputy Public Defender with the Kern County Public Defender's Office for 3 years.

The Director of Litigation, Jeanette Irigaray, Esq., is responsible for the development, supervision and coordination of substantive legal work for the units she supervises. As Director of Litigation, it is her charge to maximize the quality of the legal product through individual litigation efforts, effective co-counseling with other GBLA attorneys or outside pro bono counsel, and development and implementation of training plans as needed. This individual also carries a complex caseload.

3d. Supervision of Volunteers

Describe if any volunteers will be utilized for this project and how they will be supervised. (250 word limit)

Please refer to item 2e, above.



3e. Pro Se Document Review

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

All document preparation will be done under the supervision of a licensed attorney.

3f. Sub-Grants

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

Not Applicable.

3g. Eligibility for Services

Identify all criteria and guidelines used to establish eligibility for services and how the project screens for eligibility for services. (250 word limit)

Individuals will complete an Intake Questionnaire which asks for information on income, assets, and purpose of visit. If the prospective litigant's income exceeds the permissible Shriver Partnership Guidelines, or the subject matter is outside the scope of services provided by the project, then he/she will be referred to other resources, if available, including the Court's Self-Help Center.

3h. Will this project serve non-indigent persons?

☐ Yes

☒ No

3i. Referrals

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

If the prospective litigant's income exceeds the permissible Shriver Partnership Guidelines, or the subject matter is outside the scope of services provided by the project, then he/she is referred to other resources, if available, including but not limited to the Court's Self-Help Center-online or in the local courthouse and the County Lawyer Referral Service through the Kern County Bar Association.



3j. Attorney-Client Relationship

Will this project establish an attorney-client relationship? If yes, describe how project staff will check for conflicts, and how individuals will be served if a conflict is identified. If no, explain how litigants will be made aware of the scope of services to be provided and that no attorney-client relationship will be established. (250 word limit)

Yes, an attorney-client relationship will be established.

Using GBLA's fully computerized and networked case management system (PRIME), and consistent with GBLA policies and procedures, the Intake & Assessment Advocate conducts eligibility and conflict screening. It is possible a referral for direct representation by a GBLA Housing Attorney may be ineligible for representation due to a conflict of interest, such as in cases when the referral has been an opposing party in another GBLA case. In these instances, the referral will be made to the Court's Unlawful Detainer Adviser. In cases where a client proceeds Pro Se, the Unlawful Detainer Adviser does not establish an attorney-client relationship. A Project Disclosure Form is read, signed, and dated by the self-represented litigant before any assistance is provided. This form outlines the limitations of the scope of services to be provided. In order to preserve attorney-client privileges as well as conflicts of interest, the Project will be separated by an "ethical wall." The GBLA Attorneys will operate as a separate unit apart from the Court Unlawful Detainer Adviser and Court Paralegal. In order to preserve the ethical wall, GBLA's Director of Litigation (or his/her designee), located at LTAC, will not share confidential client information with Court Staff.



3k. Impartiality of the Court

Will this project serve only one party or side of a matter? If yes, identify which party(ies) will be served and why this project has established this service model. If only one side is served, describe how the project will ensure the court's impartiality. (250 word limit)

Yes, this Project will only serve one side - the eligible tenant(s). In housing matters generally, and unlawful detainers case specifically, landlords are frequently non-natural persons, be they corporations, LLCs, or partnerships that own residential property, or property management companies that manage residential property. Such business organizations are prohibited by law from appearing in Court Pro Se themselves, thus they must retain legal counsel when involved in litigation. Therefore, Plaintiffs in unlawful detainer matters are very frequently represented by counsel. At the same time, Defendants in unlawful detainer matters are frequently low-income tenants. The most common reason for filing an unlawful detainer is nonpayment of rent, which, for obvious reasons, disproportionately affects low-income tenants. As a result, Defendants in unlawful detainer matters are likely to be unrepresented and facing a represented Plaintiff. As described in this narrative, all eligible unrepresented tenants will receive some level of service through this project, as resources permit.

4. Continuity Planning

4a. Describe plans to obtain funding that will sustain this project's services beyond the Partnership Grant term. (250 word limit)

GBLA will continue to actively seek and apply for viable grants opportunities.



4b. List all funding sources that have been explored or pursued for this project in the last twelve months.

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

In February of 2023, GBLA's former Director of Development applied for and received a multi-year award of approximately \$1,468,971 from the Judicial Council of California for its Shriver Kern Housing Pilot Project on behalf of GBLA. Term of funding is October 1, 2023 through September 30, 2026.

However, in December of 2023, GBLA's long-time Director of Development retired leaving GBLA with a vacancy. GBLA's attempt to recruit and hire for this position were unsuccessful as it proved difficult to find a qualified individual. Therefore, GBLA's Executive Director adopted a team approach to development. To that end, this position has now been brought back in-house and those functions assumed by GBLA's Administrator, Danita Melton, who has been with the agency since 1993. Ms. Melton has played an integral part in the submission of both competitive and non-competitive renewal applications during her entire tenure, including working closely with GBLA's former Director of Development. As such, Ms. Melton now serves as the Director of Grant Aquisitions & Management and leads the newly formed development team.

4c. Other Efforts

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

See item 2e above, Coordinated Efforts.

5. Evaluation

5a. Project Services



5.a.1. Copy of Partnership Grant Evaluation

2020_Partnership_Evaluation_-_Submitted_3-12-21.pdf
2.4 MB - 05/06/2024 8:49PM

Total Files: 1

5.a.2. Existing Project Updates

For existing projects, provide a brief summary of services provided in the current year with any relevant highlights, benchmarks, challenges, etc. What changes have been made to the project over the past year, and what changes are anticipated in the upcoming grant year? (250 word limit)

Not Applicable.

5b. Satisfaction Surveys

5.b.1. Copy of Satisfaction Survey

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

Existing_Client_Satisfaction_Survey.pdf
131.8 KB - 05/06/2024 8:53PM

Total Files: 1



5.b.2. Survey Distribution & Analysis

GBLA staff is committed to gathering and analyzing accurate project data and reporting on outcomes of those services. GBLA's existing Satisfaction Survey will be tailored to this project. Given the fact that services are provided on a one-on-one basis, distribution of surveys will be provided upon conclusion of services and responses encouraged. At that point, the client will have the option whether or not to submit feedback to the project.

Important to note, in 2011-2014, 2014-2017, 2017-2020 GBLA readily volunteered to serve as one of the pilots for the evaluation effort and actively participated in the Randomization Study with the Judicial Council's evaluation consultant for its housing project. Moving forward, GBLA continues to be committed to cooperating with the evaluation contractor with data collection, including supplying information about the time devoted to representation of project clients, maintaining case and statistical information required for reporting purposes, facilitating access to Court records for review, facilitating access to clients for follow-up surveys or interviews, and hosting evaluator site visits. GBLA has the ability and willingness to participate in an extensive site-level evaluation, including the possibility of random assignment of cases to either receive or not receive representation.

5c. Additional Evaluation Methodology

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

GBLA can utilize its computerized case management system (PRIME) to run additional reports for project clients which identify the disposition of each case. Analysis of these reports will determine whether additional resources and/or training of staff may be required.

5d. Court Evaluation

Describe the court's role in evaluating this project. (250 word limit)

The Court's Project Manager/Court Liaison, Cindy Espinoza (Family Law Facilitator/Self-Help) is responsible for all aspects of Project administration for the Court. This individual will provide GBLA with prior year baseline statistics as well as year-end statistics to be utilized by GBLA in its Annual Evaluation Report to the State Bar. In addition, Partnership staff will work closely with Court staff to ensure continuous project improvement.



Form C - Proposed Project Budget

Program Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total	Narrative
1. Lawyers	\$69,949	\$0	\$0	\$69,949	A total of \$69,949 as follows: (1) \$29,390 for 25% of a full-time Director of Litigation to review, assess and assign cases to either the project's pro-se attorney or refer to Shriver attorneys for full-scope representation; and (2) \$40,559 for 40% of a full-time Attorney to provide legal information and counsel, review and recommend options for possible early resolution, and to prepare responsive pleadings for the in pro per tenant. [Calculation: \$29,390 + \$40,559 = \$69,949]
2. Paralegals	\$0	\$0	\$0	\$0	



					\$18,782 for approx. 40% of a full-time Intake Assessment Advocate to provide eligibility and conflict screening. Clients will also be provided with meaningful linkages to an array of supportive social services and resources designed to help move them to greater self-sufficiency. [Calculation: \$64,994 per year x @ 60% = \$38,997]
3. Other Staff	\$18,782	\$0	\$0	\$18,782	
4. SUBTOTAL	\$88,731	\$0	\$0	\$88,731	
					Employee taxes including workers compensation calculated at approximately 9.6% of project staff wages. Benefits are those directly attributable to those portions being paid by the Shriver Partnership Grant. Benefit premiums include health, life, dental, vision, and short/long term care disability coverages.
5. Employee Benefits	\$18,569	\$0	\$0	\$18,569	
6. TOTAL PROGRAM PERSONNEL	\$107,300	\$0	\$0	\$107,300	

Program Non-Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total	Narrative
7. Space	\$0	\$0	\$0	\$0	



8. Equipment Rental and Maintenance	\$0	\$0	\$0	\$0
9. Office Supplies	\$0	\$0	\$0	\$0
10. Printing and Postage	\$0	\$0	\$0	\$0
11. Telecommunications	\$0	\$0	\$0	\$0
12. Technology	\$0	\$0	\$0	\$0
13. Program Travel	\$0	\$0	\$0	\$0
14. Training	\$0	\$0	\$0	\$0
15. Library	\$0	\$0	\$0	\$0
16. Insurance	\$0	\$0	\$0	\$0
17. Evaluation	\$0	\$0	\$0	\$0
18. Contract Service to Clients	\$0	\$0	\$0	\$0
19. Other	\$0	\$0	\$0	\$0
20. TOTAL PROGRAM NON-PERSONNEL	\$0	\$0	\$0	\$0
TOTAL PROGRAM	\$107,300	\$0	\$0	\$107,300
Administrative and Overhead				Narrative
21. Admin Personnel	\$0	\$0	\$0	\$0
22. Admin Non-Personnel	\$0	\$0	\$0	\$0
TOTAL ADMINISTRATIVE	\$0	\$0	\$0	\$0
TOTAL AMOUNT OF FUNDS	\$107,300	\$0	\$0	\$107,300

1. Lawyers

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Director of Litigation	0.25	0.00	0.00	0.25



Attorney	0.40	0.00	0.00	0.40
	0.00	0.00	0.00	0.00
TOTAL LAWYERS	0.65	0.00	0.00	0.65

2. Paralegals

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

3. Other Staff

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Intake & Assessment Advocate	0.40	0.00	0.00	0.40
	0.00	0.00	0.00	0.00
TOTAL OTHER STAFF	0.40	0.00	0.00	0.40
TOTAL PERSONNEL (in FTEs)	1.05	0.00	0.00	1.05

Form D - Project Assurances

Download the Assurances document and upload a signed copy below.

Upload PDF Version of
Signed Assurances
Document:

Signed_Project_Assurances.pdf
344.6 KB - 05/08/2024 4:44PM

Total Files: 1

Form E - Agreement of the Partner Court



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

1. Upload Letter(s) of Support:

Application_Summary_-_Signed_by_Judge.pdf
252.9 KB - 05/08/2024 2:44PM

Total Files: 1

2. Upload MOU(s):

Shriver_MOU_FY23-26_-_Fully_Executed_-_9-15-23.pdf
617 KB - 05/07/2024 5:00PM

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).

Shriver_Narrative_-_Feb_2023.pdf
378.7 KB - 05/07/2024 5:28PM

Total Files: 1

Staff Review

2020 Partnership Grant Evaluation

Partnership Grant Project: Partnership Shriver Grant



Evaluation Year: 2020

Form A - Expenditures

Account Title	Approved Budget	Expenses through 12/31	Unspent Funds
1. Lawyers	\$35,984	\$35,984	\$0
2. Paralegals	\$41,587	\$41,587	\$0
3. Other Staff	\$0	\$0	\$0
4. SUBTOTAL	\$77,571	\$77,571	\$0
5. Employee Benefits	\$18,429	\$18,429	\$0
6. TOTAL PERSONNEL	\$96,000	\$96,000	\$0

Account Title	Approved Budget	Expenses through 12/31	Unspent Funds
7. Space	\$0	\$0	\$0
8. Equipment Rental and Maintenance	\$0	\$0	\$0
9. Office Supplies	\$0	\$0	\$0
10. Printing and Postage	\$0	\$0	\$0
11. Telecommunications	\$0	\$0	\$0
12. Technology	\$0	\$0	\$0
13. Program Travel	\$0	\$0	\$0
14. Training	\$0	\$0	\$0
15. Library	\$0	\$0	\$0
16. Insurance	\$0	\$0	\$0
17. Audit	\$0	\$0	\$0
18. Evaluation	\$0	\$0	\$0
19. Contract Service to Clients	\$0	\$0	\$0
20. Contract Service to Organization	\$0	\$0	\$0
21. Other	\$0	\$0	\$0
22. TOTAL NON-PERSONNEL	\$0	\$0	\$0
TOTAL AMOUNT OF FUNDS	\$96,000	\$96,000	\$0

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

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

N/A

Form B - Activities

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

Select all that apply.

Housing

Explain "Other":

2. Demographics

2.a. Did the project seek to serve a particular demographic group? If so, identify the group and indicate whether that goal was achieved; if not, explain why, and how the project is responding.

Project staff provided assistance to eligible low-income tenants involving unlawful detainer matters.

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

Spanish

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

No

3. Litigant Assistance

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

3.a. Goals and Actuals

1. Goal for total number of workshops provided annually:	0	Actual total number of workshops provided annually:	0
2. Goal for total number of individuals served through workshops annually:	0	Actual total number of individuals served through workshops annually:	0

3. Goal for total number of individuals who received one-on-one services annually (Not including family members and others impacted): 3000 Actual total number of individuals who received one-on-one services annually: 79

4. If goals were not met, explain why: On March 4, 2020, California Governor Newsom declared a state of emergency related to the COVID-19 pandemic. On April 6, 2020, the Judicial Council of California enacted Emergency Rule of Court 1. This rule prohibited courts from issuing summons and complaints in unlawful detainer cases until 90 days after the state of emergency due to the COVID-19 pandemic was lifted, or unless amended or repealed by the Judicial Council. A court was allowed to issue a summons on a complaint for unlawful detainer only if the court found in its discretion and on the record, that the action was necessary to protect public health and safety. The effect of Emergency Rule 1 was, practically speaking, a moratorium on eviction cases with very limited exception. As such, pro per litigants did not require assistance or services during this time because notices to terminate, summons and complaints were, for the most part, not issued. The Judicial Council voted on August 13, 2020 to repeal Emergency Rule 1. On August 31, 2020, the California legislature enacted the COVID-19 Tenant Relief Act of 2020 (also known as AB 3088). Under this law, courts were not permitted to issue summons on a complaint for unlawful detainer based, in whole or part, on nonpayment of rent until after October 5, 2020.

Services Provided	Actual	
Group-Setting Services	# of Workshops/Annually	# of Individuals/Annually

Information on Substantive Legal Options	0	0
Information on General Court Processes and Procedure	0	0
Document Preparation or Review	0	0
Trial/Hearing Preparation	0	0
Other	0	0

Individually-Delivered (one-on-one) Services	# of Individuals/Annually
--	---------------------------

Information on Substantive Legal Options	79
Information on General Court Processes and Procedure	79
Document Preparation or Review	79
Filing Assistance	0
Mediation/Settlement Assistance	0
Trial/Hearing Preparation	0

Post-Trial/Hearing Assistance

0

Other

0

Explain "Other":

4. Referrals

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

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

Select all that apply.

Other

Explain "Other": Generally no referrals were made for reasons outlined in response to question 4 above regarding impact of moratorium of evictions during the pandemic.

4.c. Where were individuals referred?

Not Applicable

5. Resource Materials

5.a. Upload materials developed or substantially revised for this project during the grant year.

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

5.b. Briefly describe each resource material.

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

Not Applicable

COVID-19

a. If new, was this project able to launch? If continuing, how many weeks or months was the court closed?

This was a continuing project. This project provided services to pro per litigants through the Landlord-Tenant Assistance Center

(LTAC) located in the superior courthouse of Metro Bakersfield. In March 2020, at the onset of the COVID pandemic, LTAC was closed to the public, along with many other court services such as Law Library Self-Help Center and the Court's Family Law Facilitator's Office. LTAC remains closed for in person assistance. Tenants access services by calling a designated LTAC phone number for tenants, which is posted on both the court website and the door to LTAC. GBLA staff and the Court U/D adviser have remained available to provide services remotely.

b. Was the project able to transition to remote services?

Yes

c. How did the partnering court support the project in offering remote services?

In March 2020, at the onset of the COVID-19 pandemic, LTAC was closed to the public, along with other court services such as Law Library and Family Law Facilitator Office. Eventually, services were offered remotely. Tenants could access services by calling a designated LTAC phone number for tenants, which is posted on the court website and the door to LTAC. Tenants could also call GBLA's main intake phone line to apply for services.

Form C - Evaluation

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

See response to questions a and c above under COVID.

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

The evaluation of this project was suspended due to the COVID pandemic.

3. Satisfaction Surveys

3.a. Upload a copy of the satisfaction survey used during the grant year.

3.b. How many satisfaction surveys were received from litigants?

0

3.c. What did the responses reveal about the overall satisfaction of litigants?

Not Applicable

4. Court Partnership

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

See response to question c above under COVID.

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

Project staff continued to have contact with court partners throughout 2020

5. Additional Evaluation Method

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

N/A

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

Other Evaluation Materials (Optional)

1. Demographics

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

Other_Evaluation_Materials_(Optional_Upload).docx

22.7 KB - 03/12/2021 2:30PM

Total Files: 1

Other Evaluation Materials (optional)

1. Demographics

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

Below is a summary of basic demographic information.

Age of Litigants:

- 34 - Between the ages of 18-35 years old
- 36 - Between the ages of 36-59 years old
- 9 - Ages 60 years and older

Gender of Litigants:

- 58 - Female
- 21 - Male

Ethnicity of Litigants:

- 1 - Asian/Pacific Islander/Nat Hawaiian
- 16 - Black - not Hispanic
- 33 - Hispanic
- 4 - Other Race
- 25 - White

LEP:

- 2 - Hispanic

Disabled:

- 18 - Hispanic
- 2 - White

Zip Code of Litigants:

- 93301 - 8
- 93304 - 14
- 93305 - 9
- 93306 - 3
- 93307 - 9
- 93308 - 15
- 93309 - 11
- 93311 - 2
- 93312 - 3
- 93313 - 5



Client Satisfaction Survey

Based on your most recent experience with services provided
By GBLA, please rate our performance on each of the following
aspects

Overall, would you say you were satisfied or
Dissatisfied with:

Very Satisfied Somewhat Satisfied Somewhat Dissatisfied Very Dissatisfied Don't Know

- | | | | | | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. Accessibility of our services | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Professionalism of the receptionist | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Professionalism of attorney/paralegal | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Helpfulness of information provided (oral) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Helpfulness of information provided (written) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Phone calls returned promptly | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Outcome or result of case | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. How did you hear about our services? | | | | | |

- Brochure..... ☐
- Social Agency/ Resource Center..... ☐
- Court Personnel..... ☐
- Private Attorney..... ☐
- Radio/Newspaper/Flyer..... ☐
- Friend or Relative..... ☐
- Used Service Before..... ☐
- Other _____ ☐

9. How can we have served you better? _____

10. What is your zip code? _____

Name (optional) _____

Phone (optional) _____ Case No. _____

May we use your comments in our Annual Report or other publications? Yes ☐ No ☐

If yes, please sign and date: Signature: _____ Date: _____

SLC



Resumen de la Satisfacción del Cliente

En Cuanto a su experiencia más reciente con los servicios de GBLA, favor de evaluar nuestros servicios en cada uno de los siguientes aspectos:

En total, diría usted que estuvo satisfecho o no satisfecho con:

	<u>Muy Satisfecho</u>	<u>Algo Satisfecho</u>	<u>Algo No Satisfecho</u>	<u>No Muy Satisfecho</u>	<u>No Se</u>
1. Accesibilidad de nuestros servicios	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Profesionalismo de la recepcionista	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Profesionalismo del abogado/paralegal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Utilidad de la información (oral)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Utilidad de la información (escrita)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Puntualidad de la respuesta de sus llamadas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Los resultados del caso	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Como se entero usted de nuestros servicios?					
Folleto					<input type="checkbox"/>
Agencia Social/Centro de Recursos.....					<input type="checkbox"/>
Personal de la Corte.....					<input type="checkbox"/>
Abogado Particular.....					<input type="checkbox"/>
Radio/Periódico.....					<input type="checkbox"/>
Amigo o Familiar.....					<input type="checkbox"/>
Uso nuestros servicios anteriormente.....					<input type="checkbox"/>
De otro Modo					<input type="checkbox"/>

9. Como podemos mejorar nuestros servicios? _____

10. Cual es su codigo postal? _____

Nombre (optional) _____

Número de teléfono (optional) _____ No. De Caso _____

Authoriza sus respuestas para nuestro Reporte Anual o Otra Publicación? ☐ Si ☐ No

Si su respuesta es si, favor de firmar: Firma: _____ Fecha: _____

SLC

PARTNERSHIP GRANTS 2025 PROJECT ASSURANCES

Program Name: Greater Bakersfield Legal Assistance, Inc.

Project Title: Partnership Shriver Grant

Applicant assures compliance with the following:

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

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

Signed:



Executive Director
Greater Bakersfield Legal Assistance

VALENTIN NARVAEZ, ESQ.

Print Name

Date: 5-8-2024



Chair (or other officer), Board of Directors
Greater Bakersfield Legal Assistance

Teryl Wakeman

Print Name and Title BOARD CHAIR

Date: 5/7/2024

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Partnership Shriver Grant

Organization: Greater Bakersfield Legal Assistance

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

1. Project Abstract:

Greater Bakersfield Legal Assistance, Inc. (GBLA) and Kern County Superior Court (Court) respectfully request funding to support the Sargent Shriver Civil Counsel Act Pilot Project (Project) in Kern County California. The purpose of this Project is to provide legal representation in civil matters in housing-related matters and improve court procedures and services for low-income litigants. Through this grant we propose to continue to assist low-income tenants with the daunting task of responding to and steering through the unlawful detainer action process. GBLA's focus is not just on assisting those we believe to be the most vulnerable, but also to assist the Court by finding ways to maximize judicial economy. To this end, the Court will continue its implemented pre-trial Mandatory Settlement Conference requirement in unlawful detainer actions.

Initial intake is conducted at the Landlord Tenant Assistance Center (LTAC) located inside the Courthouse (near the UD Courtroom) in Bakersfield-Metropolitan Division, Kern County. Here, individuals are screened for eligibility and conflicts, and provided with case assessment and direction. Cases are evaluated for an array of services including (1) brief counsel and advice; (2) direct legal representation; (3) pro per assistance; (4) participation in Early Dispute Resolution; and (5) linkages to social services. The Shriver Partnership grant will support the Pro Se assistance component. Located at LTAC, GBLA's Intake Specialist is the first point of contact and provides eligibility and conflict screening. This position also provides eligible clients with meaningful linkages to an array of supportive social services and resources designed to help move them to greater self-sufficiency. The Intake Specialist is supervised by the Director of Litigation (or his/her designee), a position supported by the Shriver Partnership Grant. GBLA's Director of Litigation provides case assessment and direction in all eligible cases. The Director of Litigation will meet with the client to review the facts and circumstances, provide legal information and counsel, review and recommend options for possible early resolution, and prepare responsive pleadings for the tenant in pro per. Only the pro per assistance component will be charged to the Shriver Partnership Grant.

2. Attorney-Client Relationship: I understand and agree to the applicant's description of whether or not an attorney-client relationship will be established. If yes, project staff will check for conflicts and identify how individuals will be served if a conflict exists as described below. If no, litigants will be made aware of the scope of services to be provided and that no attorney-client relationship will be established in the manner described below.:

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Partnership Shriver Grant

Organization: Greater Bakersfield Legal Assistance

Yes, an attorney-client relationship will be established. Using GBLA's fully computerized and networked case management system (PRIME), and consistent with GBLA policies and procedures, the Intake Specialist conducts eligibility and conflict screening. It is possible a referral for direct representation by a GBLA Housing Attorney may be ineligible for representation due to a conflict of interest, such as in cases when the referral has been an opposing party in another GBLA case. In these instances, the referral will be made to the Court's Unlawful Detainer Adviser. In cases where a client proceeds Pro Se, the Unlawful Detainer Advisor does not establish an attorney-client relationship. A Project Disclosure Form is read, signed, and dated by the self-represented litigant before any assistance is provided. This form outlines the limitations of the scope of services to be provided. In order to preserve attorney-client privileges as well as conflicts of interest, the Project will be separated by an "ethical wall." The GBLA Attorneys will operate as a separate unit apart from the Court Unlawful Detainer Advisor and Court Paralegal. In order to preserve the ethical wall, GBLA's Intake/Assessment Attorney, located at LTAC, will not share confidential client information with Court Staff.

3. Impartiality of the court: I understand and agree to the applicant's description of whether the project will serve only one party or side of a matter. If yes, the project will take the following steps to explore all implications of the decision and to address any risk of impropriety on the court's part as described below. If no, and both parties or sides will be served, no additional information is required.

Yes, this Project will only serve one side - the eligible tenant(s). In housing matters generally, and unlawful detainers case specifically, landlords are frequently non-natural persons, be they corporations, LLCs, or partnerships that own residential property, or property management companies that manage residential property. Such business organizations are prohibited by law from appearing in Court Pro Se themselves, thus they must retain legal counsel when involved in litigation. Therefore, Plaintiffs in unlawful detainer matters are very frequently represented by counsel. At the same time, Defendants in unlawful detainer matters are frequently low-income tenants. The most common reason for filing an unlawful detainer is nonpayment of rent, which, for obvious reasons, disproportionately affects low-income tenants. As a result, Defendants in unlawful detainer matters are likely to be unrepresented and facing a represented Plaintiff. As described in this narrative, all eligible unrepresented tenants will receive some level of service through this project, as resources permit.

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

If the prospective litigant's income exceeds the permissible Shriver Partnership Guidelines, or the subject matter is outside the scope of services provided by the project, then he/she is referred to other resources, if available, including but not limited to the Court's Self-Help Center-online or in the local courthouse and the County Lawyer Referral Service through the Kern County Bar Association.

Application Summary

Funding Opportunity: Partnership Grants

Project Title: Partnership Shriver Grant

Organization: Greater Bakersfield Legal Assistance

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

Status of MOU:

Continuing MOU is enclosed and will be effective during the grant term.

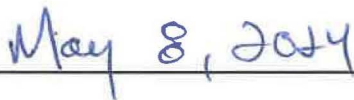
6. Additional Comments, if any:

State Bar will be provided with copy of existing MOU between GBLA and Kern County Superior Court dated September 2023.

Signature of Presiding Judge



J. Eric Bradshaw, Presiding Judge
Judge



Date

MEMORANDUM OF UNDERSTANDING

THIS MEMORANDUM OF UNDERSTANDING, (hereafter, "MOU"), is made and entered by and between the Superior Court of California, County of Kern (hereafter "Court") and Greater Bakersfield Legal Assistance, Inc. (hereafter "GBLA").

NOW, THEREFORE, the Court and GBLA mutually agree as follows:

1 TERM: This MOU shall become effective October 1, 2023 and shall continue and remain in effect through and including September 30, 2026, the term of grant funds available through the Judicial Council of California.

2 COURT RESPONSIBILITIES: The Court's services may include, but may not be limited to, the following:

- i Provide office space, office furniture, phones, supplies, and access to office equipment for services to be rendered to low-income UD litigants at the Landlord Tenant Assistance Center (LTAC), located inside the courthouse.
- ii Family Law Facilitator will provide on-site project administration for the Court, including supervision of Landlord Tenant Assistance Center (LTAC) Court personnel and communications between GBLA and Court administration.
- iii Assist in promotion of project services.
- iv Participate in project evaluation activities.

GBLA RESPONSIBILITIES: GBLA's services may include, but may not be limited to, the following:

- i Provide project staff at the Landlord Tenant Assistance Center (LTAC) to provide information and assistance to low-income litigants seeking assistance in UD matters.
- ii Provide administration, spending, and accounting of grant funds.
- iii Evaluate the quality and effectiveness of project services.

- iv Monitor, record, track, compile and keep on file all statistics including outcomes of project activities and share in reports as required and requested by the Judicial Council of California.
- v Maintain direct contact with the Judicial Council of California.

REPRESENTATIONS:

- i Both the Court and GBLA have the knowledge, staff, and facilities necessary to implement project services.
- ii The Court and GBLA enter into this MOU with a spirit of cooperation and expectation that this project will be a successful joint endeavor benefitting indigent litigants seeking assistance in UD matters.

TERMINATION: Either party may terminate this MOU, with or without cause, upon thirty (30) days prior written notice to the other party with no further obligations as outlined herein. However, due to the terms of the grant, such termination will likely end the viability of the project, and as such, the parties will make every reasonable effort to comply with the terms of this MOU.

CONFIDENTIALITY: Neither party shall communicate confidential information, designated in writing or identified in the MOU as such, to any third party and shall protect such information from inadvertent disclosure to any third party in the same manner that they protect their own confidential information, unless such disclosure is required in response to a validly issued subpoena or other process of law. Upon completion of this MOU, the provisions of this paragraph shall continue to survive.

OWNERSHIP OF DOCUMENTS/EQUIPMENT: All reports, documents, materials, equipment, software, and other items generated or obtained in the course of providing services pursuant to the Grant shall remain the property of GBLA, and shall be maintained by GBLA in accordance with existing office practices.

NON-APPROPRIATION: The parties reserve the right to terminate or modify this MOU in the event insufficient funds are appropriated or budgeted for this MOU in any fiscal year. Upon such termination or modification, the parties shall be released from any further financial obligation or other responsibilities outlined herein. Thirty (30) days prior written notice will be given in the event either party requires such action.

AUDIT, INSPECTION & RECORD RETENTION: The parties agree to maintain and make available to each other and the Judicial Council of California and their agents, the books and records of all its activities under this MOU. GBLA shall manage this project in compliance with its existing managerial structure as outlined in the Grant Application. GBLA shall permit the Court and/or the Judicial Council of California and their agents to audit, examine, and make copies of its records, invoices, materials, personnel information, or other data directly related to this project. The parties shall maintain such data and records in an accessible location and condition for a period of not less than three (3) years from the date of final transaction under this MOU. The State of California and/or any federal agency having an interest in the subject of this MOU shall have the same rights to inspect and audit the books and records as set forth herein.

NOTICE: Any notice required or permitted to be given under this MOU shall be in writing and shall be served by registered mail, return receipt requested or personal service upon the other party. When served by registered mail, return receipt requested, service shall be concluded on the date the return receipt is signed.

Notice to the Court shall be addressed as follows:


Eric Bradshaw, Presiding Judge
Superior Court of California, County of Kern
1415 Truxtun Avenue
Bakersfield, CA 93301
(661) 610-6000
Contact: Cynthia Espinosa, Family Law Facilitator
(661) 610-6520

Notice to GBLA shall be addressed as follows:

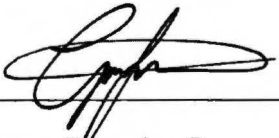
Giovanna Fournier Ocampo, Interim Executive Director
Greater Bakersfield Legal Assistance, Inc.
615 California Avenue
Bakersfield, CA 93304
(661) 321-3986

In witness whereof, the parties hereto have executed this Memorandum of Understanding on the date and year herein-below written.

SUPERIOR COURT OF CALIFORNIA, COUNTY OF KERN

By:  9-15-23
Eric Bradshaw, Presiding Judge Date

GREATER BAKERSFIELD LEGAL ASSISTANCE, INC.

By:  9/13/2023
Giovanna Fournier Ocampo, Interim Executive Director Date

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4. Substantive Area(s)
Family/Domestic Violence

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

If yes, for how many years? Describe any significant changes since the project's inception or anticipated changes.

Yes, the Justice & Diversity Center of the Bar Association of San Francisco (JDC) requests a third year of Partnership funding for its Family Law Self-Help (FLASH) program. There have been no substantive changes to the project's operation or staffing structure since the original application for Partnership grant support was submitted in 2022.

6. Project Abstract

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

The Justice & Diversity Center of the Bar Association of San Francisco (JDC) requests continued Partnership Grant support to operate the Family Law Assisted Self Help (FLASH) project, which provides legal assistance to indigent Self-Represented Litigants (SRLs) seeking marriage dissolutions at the San Francisco Superior Court (Court), via its ACCESS Self-Help Center. FLASH provides culturally sensitive and trauma-informed services in Spanish and English to DV survivors and other indigent SRLs who would otherwise be barred from access to justice.

Services consist of direct legal assistance to SRLs who are referred by the ACCESS Center. ACCESS staff screen SRLs for income eligibility and prioritize cases where the SRL would benefit most from receiving FLASH services. The FLASH Attorney meets one-on-one with SRLs referred by the ACCESS Center at each stage of their cases until a judgment of dissolution is obtained. The FLASH Attorney provides information and guidance and drafts all necessary pleadings for SRLs who would not be able to complete their divorce paperwork without the assistance of FLASH.

FLASH also provides day-of-court assistance to SRLs on the Family Centered Case Resolution (FCCR) Calendar, where the court calls cases that have failed to conclude within 18 months of the initial filing. Indigent SRLs who appear on this calendar have filed for divorce but have been unable to obtain a judgment. The FLASH Attorney works with income-qualified litigants on the day of this calendar and schedules individual appointments with these SRLs to complete their matters.

As a result of the COVID-19 pandemic, JDC has developed innovative methods to communicate and interact with SRLs. Our intake form has been converted to an electronic fillable document so the ACCESS Center can complete the initial set of pleadings for each SRL. Additionally, we have added text communication capability as most of the FLASH Attorney's low-income clients are unable to use video-conferencing. These practices continue, even as in-person services have resumed, since some clients prefer to meet remotely for their own convenience. For those SRLs who prefer in-person meetings, FLASH maintains a regular presence at the court within the ACCESS Center's offices.

In March 2020, the Court ended Mandatory Settlement Conference (MSC) Workshops and, indeed, all workshops and clinics.

The Court now refers litigants directly to JDC when income-qualified SRLs need help with MSCs and MSC Statements. The FLASH Attorney works individually with each qualified SRL to complete the extensive MSC Statement and to prepare to present their case at the MSC.

Form B - Project Description

1. Court Involvement

1a. Partner Court(s)

San Francisco Superior Court

1b. Court Involvement

Describe the current/planned coordination and collaboration on this project with the Partner Court identified, including but not limited to:

- Integration with existing court-based services
- Use of facilities and court resources
- Types and frequency of meetings planned
- Any other aspects not described above

(250 word limit)

JDC's FLASH Attorney is housed within the San Francisco Unified Family Court's ACCESS Self-Help Center, providing SRLs with legal information, consultations, and document preparation for their divorce cases. These services are incredibly important to the Unified Family Court's ability to operate smoothly and justly in handling matters that involve indigent SRLs.

As part of the collaboration on the FLASH Project, the Court has agreed to the following:

- Meet with JDC personnel regularly to plan, implement, and evaluate the project.
- Provide appropriate office space for the project attorney in which the project attorney can conduct one-on-one appointments with customers.
- Provide information on SRLs set to appear before the Family Centered Case Resolution (FCCR) Calendar.
- Provide access to computer, fax machine, and a copy machine for the use of the project attorney.
- Work with JDC to screen and assess cases, to make appropriate referrals, and to help pro se litigants navigate the judicial process.
- Provide JDC staff with access to the ACCESS Center's legal resources library and customer resource materials.
- Cooperate with JDC's efforts to support the project by endorsing grant applications and participating in the implementation and evaluation of grants consistent with the goals and mission of the ACCESS Center.
- Assist JDC with training, supervising, and managing of the FLASH Attorney.

Partner Court	Location of Services	Address	On-Site Days/Hours	Total On-Site Hours/Month
San Francisco Superior Court	ACCESS Center	400 McAllister Street, San Francisco, CA 94102	Two Days per Week (rotating), 9:00 am to 5:00 pm	56

2. Project Impact

2a. Needs Assessment

Target population(s): Describe the population(s) that your project is designed to help. You may describe a single target population and/or multiples. Describe why the target population is in particular need of the services to be provided. (250 word limit)

JDC's FLASH project serves low-income Self-Represented Litigants (SRLs) seeking divorce or responding to requests for divorce. FLASH prioritizes monolingual Spanish-speakers and those facing other challenges that would require services beyond the capacity of the ACCESS Center. These individuals are unfamiliar with the civil justice system and need assistance meeting legal process requirements. Without this assistance, these SRLs often drain an inordinate amount of Court resources and are frequently ill-served by the justice system due to a lack of comprehension and counsel. Many FLASH customers are survivors of domestic violence and face additional barriers related to trauma and continued interaction with abusive partners who seek to manipulate and control them.

Many of the FLASH program's clients are recent immigrants and monolingual Spanish-speakers, making our FLASH Attorney's bilingual capacity critically important to serving these low-income SRLs. Often these individuals have multiple overlapping legal needs that reach beyond the scope of the FLASH project and into other areas of law, such as immigration and housing. For these individuals, the FLASH Attorney makes warm referrals to other JDC projects that are equipped to meet their specific legal needs.

2b. Areas to be served

Describe the geographic area(s) to be served by the project. If you consider this area to be rural or if this project will meet unmet rural needs, please explain why. (250 word limit)

JDC's FLASH project operates at the San Francisco Superior Unified Family Court and at the Court's ACCESS Center. These services are provided exclusively in San Francisco and to residents of San Francisco County. San Francisco has a broad diversity of residents with varying needs and capacities – including pockets of great wealth and deep poverty. JDC's services – especially the FLASH program – are intended to level the playing field for low-income litigants who cannot afford to retain private counsel.

2c. Types of Services to be Provided

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

FLASH services will consist of legal information, consultations, document preparation, and continued legal assistance for indigent SRLs referred by the ACCESS Center, as well as SRLs appearing on the Family Centered Case Resolution (FCCR) Calendar.

ACCESS Center staff conduct intake interviews for all SRLs seeking assistance with their cases through the Court's Self-Help and Family Law Facilitator's offices. When an SRL is seeking a dissolution of marriage or responding to a petition for dissolution previously filed by their spouse and income-qualifies as indigent, ACCESS staff completes the FLASH intake form online and emails it to the FLASH Attorney. The FLASH Attorney then contacts the SRL to schedule an appointment. Priority is given to SRLs who are monolingual Spanish-speakers and those with other challenges that would require more time and attention than is possible to provide through the ACCESS Center's regular services.

FLASH also assists income-qualified SRLs on the FCCR calendar, which calls before the Court all litigants who have failed to bring their case to judgment within 18 months of filing and, thereafter, at regular intervals. The SRLs on this calendar have been unable, for linguistic, economic, educational, and other reasons to complete the paperwork necessary to obtain a

judgment.

All cases on the FCCR are divorce, legal separation, nullity, and parentage matters. The parties on this calendar are those without access to technology to work remotely with the Court's ACCESS Center – which remains largely remote in the wake of the COVID-19 pandemic – and those who cannot complete paperwork on their own. The Judge on the FCCR calendar explains to each litigant on the FCCR calendar why their case has not concluded and informs each SRL where to obtain services.

Prior to the FCCR calendar, the Department Clerk forwards a copy of the complete list of cases to be heard on the FCCR hearing date. The FLASH Attorney drafts written summaries of all cases for income-qualified SRLs who have received notice of the FCCR hearing. The FLASH Attorney provides her cases summaries to the Court prior to the hearing date and is physically present in the courtroom for the FCCR calendar. She takes the initiative and responsibility to work with the SRLs to complete all paperwork required to finish their cases.

On the day of the FCCR, the FLASH Attorney provides direct legal assistance and makes follow-up appointments for litigants to meet remotely or on site at the ACCESS Center and directs litigants to other resources as appropriate. Referral destinations include services provided by the ACCESS Center, other legal services providers, and JDC's full-scope pro bono representation services.

2d. Language Access

Briefly describe what languages will be offered, how language services will be offered, and the language capabilities among project staff. (250 word limit)

On 12/4/2023, after an extensive search, JDC hired our current FLASH Attorney, Jennifer Gomez. Ms. Gomez is a native speaker of both English and Spanish and can assist SRLs in either of these languages. JDC's broader Family Law Program employs a number of individuals who speak other languages-- our Family Law Paralegal speaks Cantonese, our Custody Paralegal speaks Mandarin, and the Director/Managing Attorney of Pro Bono Legal Services speaks Russian. The FLASH program makes use of these positions' linguistic capacities when needed, even if they are not technically FLASH program staff members.

The FLASH Attorney offers direct legal services in both Spanish and English. For languages that other JDC staff speak – Mandarin and Russian – FLASH clients receive services via translation provided by these staff members. Further, during the FCCR calendar, Court interpreters are available to interpret for monolingual speakers of languages that FLASH does not offer. As such, our FLASH services are accessible to all eligible individuals, regardless of their language abilities or preferences.

The overwhelming majority of FLASH clients speak either Spanish or English. Approximately 50% are monolingual Spanish speakers, or prefer Spanish due to limited English proficiency. The other 50% are primarily English speakers with a small number of speakers of other languages. As such, the FLASH Attorney is able to provide direct legal services without interpretation for nearly 100% of FLASH clients. For the very few clients who speak neither Spanish nor English, interpretation is available as explained above.

2e. Coordination Efforts

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

While JDC as an agency works very closely with a number of other legal services providers and collaborative service groups,

the FLASH project is exclusively a partnership between JDC and the Unified Family Court. No other legal service providers are involved in the FLASH program.

2f. Proposed Services

Briefly describe the goal(s) for this project. (250 word limit)

The overall goal of JDC's FLASH Project is to ensure that low-income self-represented litigants with marriage dissolution cases before the San Francisco Superior Court receive the legal assistance they need to bring their cases to judgment. FLASH prioritizes SRLs who have linguistic, literacy, or other socio-economic issues that necessitate the guided self-help that FLASH is able to offer versus the more hands-off approach that ACCESS is able to provide. The FLASH Project will provide direct legal services with this goal for at least 196 individuals in 2024.

Further, the project aims to facilitate Court processes to reduce the burden on Court personnel and enable the Court to operate efficiently. Consistently positive feedback from Court staff indicate that the project is enormously valuable to Court efficiency and equity.

2.f.1. Individual Services

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

196

Describe the format and how often these services will be provided. (250 word limit)

JDC's FLASH services are provided within the San Francisco Superior Unified Family Court's ACCESS Self-Help Center, where a JDC staff attorney provides free legal information, consultations, and extensive document preparation to indigent SRLs. The FLASH Attorney also offers legal assistance for low-income SLRs on the Family Centered Case Resolution (FCCR) Calendar. Services are available in-person at the courthouse two-days/week and remotely three days/week, provided by a bilingual (English and Spanish) FLASH Attorney during regular business hours.

2.f.2. Workshops

Total number of workshops planned:

0

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

0

Describe the format and how often these services will be provided. (250 word limit)

As of March 2020, the Court ended all workshops and group meetings due to the COVID-19 pandemic and has not resumed these workshops. We do not expect the Court to resume workshops in 2024 or 2025.

JDC is ready to resume live workshops under the FLASH Attorney's supervision when the ACCESS Center allows. JDC is also in the process of locating space close to the courthouse, at the San Francisco Law Library or other Civic Center site, where we can conduct workshops should the ACCESS Center remain closed to group gatherings for a prolonged period.

2.f.3. Self-Help Clinics

Total number of clinics planned:

0

Total number of individuals expected to be served at clinics (do not double count those served through individual services or workshops):

0

Describe the format and how often these services will be provided. (250 word limit)

As of March 2020, the Court ended all workshops and group meetings due to the COVID-19 pandemic and has not resumed these workshops. We do not expect the Court to resume clinics in 2024 or 2025.

	Individual Services	Workshops	Self-Help Clinics
	Yes	No	No
	Yes	No	No
	Yes	No	No
	Yes	No	No
	Yes	No	No
	Yes	No	No
	Yes	No	No

2.f.5. Other Services

Describe any "other" services that will be provided. (250 word limit)

The "Other" category includes miscellaneous legal services provided to SRLs whose cases and legal needs do not fit easily into the categories otherwise listed. For example, FLASH provides extensive services to assist litigants who are unable to locate opposing parties for service of process and must serve the other side by conducting a due diligence investigation serving the other party by posting. FLASH also provides information and guidance regarding service of process on parties residing outside of the United States. Further, FLASH provides the legal paperwork and assistance required to join retirement and pensions into divorce cases, to reinstate pre-marital names after divorce, and many other services

2.f.6. Total number of individuals to be served (auto-calculated)

Click "Save & Finish" later to view the current total.

196

3. Administration

3a. Grant Year Timetable

For existing and new projects, describe the proposed timetable for the implementation or continued administration of the project

by quarter for the grant year. Indicate if any significant changes to existing operations are anticipated.

Q1 (January-March): This FLASH project is already in operation and does not require any start-up or launch period. The FLASH Attorney is on staff and providing services. The quarterly Grant Year Timeline, therefore, will consist of JDC's best estimate for when project deliverables will be achieved.

(250 word limit)

Individuals to be served by the FLASH Attorney: 49

Q2 (April-June):

(250 word limit)

Individuals to be served by the FLASH Attorney: 49

Q3 (July-September):

(250 word limit)

Individuals to be served by the FLASH Attorney: 49

Q4 (October-December):

(250 word limit)

Individuals to be served by the FLASH Attorney: 49

3b. Outreach & Community Engagement

3.b.1. Outreach

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

The ACCESS Center refers all income-eligible SRLs seeking or responding to divorce cases to the FLASH Attorney. These referrals alone are sufficient to fill the FLASH Attorney's busy schedule. When the FLASH schedule becomes booked out too far, ACCESS staff will prioritize cases for referral to FLASH that would most benefit from FLASH services, litigants who are monolingual Spanish-speakers, survivors of domestic violence, and/or face other challenges that require the more extensive services that FLASH provides.

With regard to the FCCR calendar, the Court sends out a Notice of Hearing to litigants whose cases have been inactive for 18 months or more. SRLs receive information with the FCCR Notice notifying them that legal assistance is available through the ACCESS Center. When FLASH-eligible litigants contact ACCESS, they are referred to the FLASH Attorney. Additionally, family law judges directly inform litigants of available FLASH services during the FCCR calendar and at other hearings such as the Law and Motion and Custody calendars and at Status Conferences as needed.

In addition to direct referrals from the ACCESS Center and Family Law Judicial Officers, JDC's Family Law Project refers eligible cases to FLASH when representation is not available through other JDC programs. With all of these referral sources, additional outreach is not required to meet our program goals.

3.b.2. Outreach Resources

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

N/A: All materials are already developed and in use.

3c. Staffing

Identify key personnel involved in staffing and supervising this project. Describe how supervision will be provided, for example, onsite or remotely. (250 word limit)

JDC hired its current FLASH Attorney, Jennifer Gomez in December 2023. Jennifer is fluent in Spanish and English and is an honors graduate from Golden Gate University Law School. She is a Bay Area native with a strong commitment to public service. Although she is a recent graduate, Ms. Gomez served as a Legal Services Funders Network Fellow at All for the Family Legal Clinic, Inc., in 2023 where she prepared court filings for divorce, custody, and domestic violence cases. She also appeared in Court and argued on behalf of clients as a Certified Law Student. In addition to her work at All for the Family Legal Clinic, Inc., prior to graduation, Jennifer served as an intern at Okalend Unified School District's Legal Department as well as Kids in Need of Defense.

JDC's Supervising Family Law Attorney, Lisa Wolter, joined JDC in August 2020. Before joining JDC, Ms. Wolter litigated and mediated family law disputes in both private and public contexts. From 2004-2015, Ms. Wolter was a Staff Attorney I/II at the ACCESS Self-Help Center in the Superior Court of San Francisco. This decade long tenure at the Superior Court of San Francisco working with unrepresented litigants fluently in English and Spanish gives her a strong base of knowledge with the needs of low income litigants in the county, and the FLASH program in particular. Ms. Wolter was promoted to the Supervising Family Law Attorney from the FLASH Attorney position in November 2022, giving her unique insight into the operation of the FLASH Project.

Director/Managing Attorney of Pro Bono Legal Services, Antonia More, joined JDC in November 2013. Ms. More is tri-lingual in Spanish, Russian, and English. Prior to February 2020, Ms. More was the FLASH Attorney on this project, giving her a strong base of knowledge as she oversees the department. Before joining JDC, Ms. More staffed the Alameda County Superior Court's Family Law Facilitator's Office and was a litigation partner in private practice.

Frances Yokota is currently the Court Manager with the Unified Family Court, who will continue to serve as the lead staff person at the Court managing the calendars. Judy Louie, Director/Family Law Facilitator of the ACCESS Center, will continue as the lead for the ACCESS Center-based services which include the one-on-one appointments.

3d. Supervision of Volunteers

Describe if any volunteers will be utilized for this project and how they will be supervised. (250 word limit)

N/A: JDC does not use volunteers in the operation of the FLASH program.

3e. Pro Se Document Review

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

Prior to filing, documents prepared by the FLASH Attorney are reviewed by one of the Unified Family Court clerks located in the ACCESS Center.

3f. Sub-Grants

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

Not applicable

3g. Eligibility for Services

Identify all criteria and guidelines used to establish eligibility for services and how the project screens for eligibility for services. (250 word limit)

All litigants are screened for income eligibility initially by ACCESS Center staff, which screening is then confirmed by the FLASH Attorney at the first meeting with the litigant. The FLASH Attorney reviews income documentation – such as pay stubs,

tax returns, or eligibility documentation from another public benefit exclusive to indigent individuals. All referrals from the Court's FCCR calendar or other hearings are made only when the litigant has obtained a Fee Waiver based on income level or when the Income and Expense Declaration in the Court's file indicate that the litigant meets FLASH income guidelines. Only individuals or families with incomes at or below 200% of the federal poverty level will be provided FLASH services.

3h. Will this project serve non-indigent persons?

☐ Yes

☒ No

3i. Referrals

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

For litigants who are ineligible for services due to income, subject matter, or residency, JDC refers them to other JDC projects as appropriate and to the Bar Association of San Francisco's Lawyer Referral Information Service (LRIS). Referrals are generally made directly from JDC to LRIS to ensure that the litigant does not have to repeat his or her story many times. JDC and LRIS, as part of the umbrella of the Bar Association of San Francisco, have been working together closely for more than 40 years and refer thousands of cases back and forth to each other throughout the year. Customers from other counties are generally referred to agencies in those counties. JDC works closely with these agencies to ensure that it has their most accurate and up-to-date information on file. Cases that are not income eligible may also be assisted by the ACCESS Center.

3j. Attorney-Client Relationship

Will this project establish an attorney-client relationship? If yes, describe how project staff will check for conflicts, and how individuals will be served if a conflict is identified. If no, explain how litigants will be made aware of the scope of services to be provided and that no attorney-client relationship will be established. (250 word limit)

No. JDC requires FLASH Program customers to sign an acknowledgment form detailing the limitations on the scope of services to be provided.

3k. Impartiality of the Court

Will this project serve only one party or side of a matter? If yes, identify which party(ies) will be served and why this project has established this service model. If only one side is served, describe how the project will ensure the court's impartiality. (250 word limit)

No. FLASH program services are available to any income-eligible individual in a divorce case at the San Francisco Unified Family Court. FLASH services are provided to both parties when requested so long as both are indigent.

4. Continuity Planning

4a. Describe plans to obtain funding that will sustain this project's services beyond the Partnership Grant term. (250 word limit)
JDC has a robust fund development program, through which it continuously and actively seeks restricted and unrestricted

support from a diverse base of funders, including foundations, government entities (local, state, and federal), law firms, corporations, and individuals. JDC will utilize these sources of support and new sources of support to sustain all facets of the FLASH project in conjunction with Partnership Grant funding.

4b. List all funding sources that have been explored or pursued for this project in the last twelve months.

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

JDC operates the FLASH Project with support from the San Francisco Department on the Status of Women (DOSW) and the San Francisco Superior Court. DOSW supports approximately 40% of the FLASH Attorney's salary, benefits, and operating costs. JDC has been working closely with the San Francisco Domestic Violence Consortium to increase funding for the project from DOSW, requesting approximately \$60,000 in additional contract funding in each of FY21-22 and FY22-23. However, due to shifting priorities at DOSW and local budget constraints, JDC has not received a significant increase in total DOSW funding since FY19-20. We do not expect this situation to shift until FY25-26, when the City of San Francisco enters its next procurement cycle.

The Superior Court provides \$35,000 per year toward the project. This amount is extraordinary for the Court and they have been very flexible and accommodating of the MOU requirements of this State Bar Partnership grant. In fact, in 2022, when JDC declined to pursue a State Bar Partnership grant in respect of the five-year general limitation on Partnership grants, the Court doubled their funding allocation toward the project to enable JDC to continue to operate FLASH services. This increase in Court funding was a one-time emergency allocation that we cannot rely on for future funding. However, the Court's willingness to allocate special funding to the project speaks to its impact and value to the Court.

4c. Other Efforts

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

The Court provides the FLASH project with office space, computer terminals, and other resources necessary to operate the project as in-kind contributions. These added no-cost resources enable JDC to request funding that supports staff salaries, benefits, and minimal operating costs – since those operating costs are mostly covered by the Court.

5. Evaluation

5a. Project Services

5.a.1. Copy of Partnership Grant Evaluation

Upload a copy of your most recent Partnership Grant Evaluation

Justice__Diversity_Center_of_the_Bar_Association_of_San_Francisco_Report_-_SUBMITTED_03-07-2024.pdf
151.3 KB - 05/07/2024 5:33 PM

Total Files: 1

5.a.2. Existing Project Updates

For existing projects, provide a brief summary of services provided in the current year with any relevant highlights, benchmarks, challenges, etc. What changes have been made to the project over the past year, and what changes are anticipated in the upcoming grant year? (250 word limit)

Since its 2021 reopening during the COVID-19 pandemic, the San Francisco Superior Court's ACCESS Center has drastically reduced its services. To date, ACCESS Center open hours are limited to three mornings per week and workshops have been discontinued indefinitely. The ACCESS Center has limited its in-person services and shifted to remote work with the goal of protecting its staff and interns.

While the shift to remote work has, no doubt, been effective in stopping the spread of infection, it has made working with indigent clients, especially illiterate and Spanish-speaking SRLs, much more difficult and time consuming. Pre-pandemic, many litigants were able to obtain default divorce judgements with only three FLASH appointments. Meeting with these SRLs remotely, as required by the ACCESS Center's restrictions which limit on-site staffing, requires five to seven appointments to accomplish the same result. Therefore, FLASH may see fewer total individuals in 2024 and 2025, while maintaining the same number of work hours for the FLASH attorney.

We do not expect the Court to resume Mandatory Settlement Conference Workshops or other clinics for SRLs in 2024 or 2025. Instead, the FLASH attorney will continue to prepare for and staff the FCCR Calendar to extend the project's reach to those low-income SRLs who have been unable to complete their dissolution. As such, we expect to continue to operate this project as we have in 2022, 2023, and 2024 for the foreseeable future.

5b. Satisfaction Surveys

5.b.1. Copy of Satisfaction Survey

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

JDC_-_FLASH_Survey_-_English.docx

55.4 KB - 05/07/2024 5:34 PM

JDC_-_FLASH_Survey_-_Spanish.docx

55.5 KB - 05/07/2024 5:34 PM

Total Files: 2

5.b.2. Survey Distribution & Analysis

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

The project will rely heavily on feedback from the litigants served. Litigants served under the Partnership grant will receive JDC's customer satisfaction survey, which gives the customer an immediate means to provide input on the service s/he received and to note any problems or concerns s/he may have and that may need redress. The FLASH Attorney will collect and review each individual form.

5c. Additional Evaluation Methodology

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

The project will also collect feedback from the Court. Judges may note the differences between the paperwork or court appearances of those litigants who have, and have not, accessed FLASH resources, and provide feedback on the differences between how those cases proceed. Court administrators also provide input on how FLASH services complement and supplement other services for SRLs.

5d. Court Evaluation

Describe the court's role in evaluating this project. (250 word limit)

JDC will partner closely with the Court to thoroughly evaluate the project. Under the terms of this grant, the core evaluation components will consist of the following:

- a. JDC's customer satisfaction survey will be provided to all litigants served under the Partnership Grant at the conclusion of service.
- b. Review of documents filed with the Court will be conducted on an ongoing basis.
- c. Meetings and interviews with Court staff and judicial officers will be conducted on an ongoing basis.

The FLASH Attorney will gather information about the litigants served by the project via a survey form developed by the Judicial Council. This survey includes demographic information such as ethnicity, language, income level, and source of income, and it captures the type of service to be provided. The FLASH Attorney will track the litigants assisted with their legal issues through the FLASH database created by JDC. This database includes customers' demographic information and services provided.

The FLASH Attorney will meet regularly with the ACCESS staff to review any issues that arise in the delivery of the project's services. The FLASH Attorney will also maintain regular communication and conduct ongoing interviews with judges, attorneys, and clerks who work within the Court to assess the impact of the project's services on Court staff. If, in the process of delivering the project's services, JDC and/or the Court deem it necessary to modify the evaluation components in order to better assess the effectiveness of the services being delivered, they will do so in close coordination with one another.

Form C - Proposed Project Budget

Program Personnel

Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total	Narrative
1. Lawyers	\$40,976	\$0	\$58,403	\$99,379	FLASH Attorney, Jennifer Gomez: \$86,320 Annual Salary X 0.34 FTE = \$29,349 allocated to Partnership funds. Supervising Family Law Attorney, Lisa Wolter: \$102,752 Annual Salary X 0.05 FTE = \$5,138 allocated to Partnership funds. Director/Managing Attorney, Antonia More: \$129,792 Annual Salary X 0.05 FTE = \$6,490 allocated to

					Partnership funds.
2. Paralegals	\$0	\$0	\$0	\$0	
3. Other Staff	\$0	\$0	\$5,681	\$5,681	
4. SUBTOTAL	\$40,976	\$0	\$64,084	\$105,060	
5. Employee Benefits	\$10,330	\$0	\$15,634	\$25,964	JDC requests Partnership Grant funds for standard agency benefits that include FICA, SUI, Workers Compensation Insurance, Medical and Dental Insurance, and 401(1)k Retirement Plan. 25.21% of total salary costs: \$40,976 X 25.21% = \$10,330.
6. TOTAL PROGRAM PERSONNEL	\$51,306	\$0	\$79,718	\$131,024	

Program Non-Personnel					
Account Title	Proposed Partnership Grant	Other State Bar Monies	Other Funding (Non-State Bar Monies)	Total	Narrative
7. Space	\$6,561	\$0	\$7,558	\$14,119	This Partnership Grant budget includes 3.24% of the total Space location budget, based on a pro rated FTE allocation formula.
8. Equipment Rental and Maintenance	\$1,665	\$0	\$733	\$2,398	This Partnership Grant budget includes 3.24% of the total Equipment Rental & Maintenance location budget, based on pro rated FTE allocation formulas.
9. Office Supplies	\$104	\$0	\$226	\$330	This Partnership Grant budget includes 3.24%% of the total Office Supplies location budget, based on a pro rated FTE

					allocation formula.
10. Printing and Postage	\$94	\$0	\$0	\$94	This Partnership Grant budget includes 3.24% of the total Printing & Postage location budget, based on pro rated FTE allocation formulas.
11. Telecommunications	\$382	\$0	\$524	\$906	This Partnership Grant budget includes 3.24% of the total Telecommunications location budget, based on a pro rated FTE allocation formula.
12. Technology	\$0	\$0	\$274	\$274	N/A: JDC does not request Partnership Grant support for Technology expenses.
13. Program Travel	\$188	\$0	\$43	\$231	This Partnership Grant budget includes 3.24% of the total Telecommunications location budget, based on a pro rated FTE allocation formula.
14. Training	\$60	\$0	\$0	\$60	This Partnership Grant budget includes 3.24% of the total Staff Training location budget, based on a pro rated FTE allocation formula.
15. Library	\$273	\$0	\$124	\$397	This Partnership Grant budget includes 3.24% of the total Library location budget, based on a pro rated FTE allocation formula.
16. Insurance	\$756	\$0	\$401	\$1,157	This Partnership Grant budget includes 3.24% of the total Insurance location budget, based on a pro rated FTE

					allocation formula.
17. Evaluation	\$0	\$0	\$0	\$0	N/A
18. Contract Service to Clients	\$0	\$0	\$0	\$0	N/A
19. Other	\$544	\$0	\$3,031	\$3,575	This Partnership Grant budget includes 3.24% of the total Other Costs location budget, based on pro rated FTE allocation formulas. Costs include litigation costs, dues & subscriptions, and employment listing expenses.
20. TOTAL PROGRAM NON-PERSONNEL	\$10,627	\$0	\$12,914	\$23,541	
TOTAL PROGRAM	\$61,933	\$0	\$92,632	\$154,565	
Administrative and Overhead					
21. Admin Personnel	\$8,067	\$0	\$8,650	\$16,717	This Partnership Grant budget includes 3.24% of the total Administrative Personnel budget, based on pro rated FTE allocation formulas. Costs include IT Expense, Finance Expense, HR Expense, and Executive Management Expense pursuant to Services Agreement with BASF.
22. Admin Non-Personnel	\$0	\$0	\$5,896	\$5,896	N/A: JDC does not request Partnership Grant support for Administrative Non-Personnel expenses.
TOTAL ADMINISTRATIVE	\$8,067	\$0	\$14,546	\$22,613	
TOTAL AMOUNT	\$70,000	\$0	\$107,178	\$177,178	

OF FUNDS

1. Lawyers

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
FLASH Attorney	0.34	0.00	0.66	1.00
Family Law Supervising Attorney	0.05	0.00	0.26	0.31
Director/Managing Attorney	0.05	0.00	0.05	0.10
TOTAL LAWYERS	0.44	0.00	0.97	1.41

2. Paralegals

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

3. Other Staff

Project Staff (Role)	FTEs - Partnership Grant	FTEs - Other State Bar Monies	FTEs - Other Funding (Non-State Bar Monies)	FTEs Total
Client Advocate	0.00	0.00	0.04	0.04
	0.00	0.00	0.00	0.00
TOTAL OTHER STAFF	0.00	0.00	0.04	0.04
TOTAL PERSONNEL (in FTEs)	0.44	0.00	1.01	1.45

Form D - Project Assurances

Download the Assurances document and upload a signed copy below.

Upload PDF Version of
Signed Assurances
Document:

JDC_-_FLASH_-_Assurances_-_Signed.pdf
319.3 KB - 05/07/2024 6:47 PM

Form E - Agreement of the Partner Court

1. Upload Letter(s) of Support:

JDC_-_SF_Superior_Court_-_LOI_for_Partnership_FLASH_App_-_SIGNED_05-07-2024.pdf
195.1 KB - 05/07/2024 7:29 PM

Total Files: 1

2. Upload MOU(s):

Refer to application instructions for MOU requirements.

MOU Expiration Date or Continuing:

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).

Opportunity ID: 13303124

Finance Number: 11094

Staff Review

Signed Assurances Document:

Court Letter(s)on File:

MOU(s) Approved:

MOU Expiration Date or Continuing:

Application Review Complete:

Second Cycle:

Reporting Status:

		Only)			
7. Space	\$8,909	\$0	\$8,338	\$8,338	\$571
8. Equipment Rental and Maintenance	\$814	\$0	\$893	\$893	(\$79)
9. Office Supplies	\$55	\$0	\$116	\$116	(\$61)
10. Printing and Postage	\$61	\$0	\$135	\$135	(\$74)
11. Telecommunications	\$338	\$0	\$326	\$326	\$12
12. Technology	\$0	\$0	\$0	\$0	\$0
13. Program Travel	\$101	\$0	\$60	\$60	\$41
14. Training	\$5,336	\$0	\$146	\$146	\$5,190
15. Library	\$126	\$0	\$256	\$256	(\$130)
16. Insurance	\$468	\$0	\$724	\$724	(\$256)
17. Evaluation	\$0	\$0	\$0	\$0	\$0
18. Contract Service to Clients	\$0	\$0	\$0	\$0	\$0
19. Other	\$11,351	\$0	\$12,098	\$12,098	(\$747)
20. TOTAL NON-PERSONNEL	\$27,559	\$0	\$23,092	\$23,092	\$4,467
ADMINISTRATIVE AND OVERHEAD	Approved Budget	April 1, 2022- December 31, 2022 Expenditures (PG 2.0 Only)	January 1, 2023- December 31, 2023 Expenditures	Total Grant Expenditures	Unspent Funds
21. Admin Personnel	\$0	\$0	\$0	\$0	\$0
22. Admin Non-Personnel	\$0	\$0	\$0	\$0	\$0
TOTAL ADMINISTRATIVE	\$0	\$0	\$0	\$0	\$0
TOTAL AMOUNT OF FUNDS	\$70,000	\$0	\$70,000	\$70,000	\$0

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

This includes whether you have any unspent funds or if any of the line items deviate from your "Approved Budget" column.

N/A: All discrepancies from the approved budget are within normal expectations.

The deadline to submit budget revisions and/or carryover requests is January 31, 2024. Grantees with approved carryovers are permitted to spend remaining grant monies for a period of six-months (through June 30, 2024). Following the spenddown period, grantees will also need to complete and submit a Partnership Grant Addendum to report on carryover monies spent.

Grantees with without an approved carryover must return unspent grant funds to the State Bar.

Form B - Activities

Complete this form to report on project services and activities from January 1, 2023-December 31, 2023.

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

Select all that apply.

Family

2. Demographics

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

Select all that apply.

Domestic Violence Survivors, Immigrants, Limited English Proficiency, Low Wage Workers, Persons of Color

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

Select all that apply.

Spanish

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

Select all that apply.

☒ Bilingual staff/volunteers (Spanish)

☐ Bilingual staff/volunteers (languages other than Spanish)

☐ Multilingual staff/volunteers (if not included above)

☐ Interpreters

☐ Translation Service

☒ Other

☐ N/A

Please indicate the number of bilingual (Spanish) staff/volunteers, position(s), FTE(s) and if funded by Partnership Grant funds. FLASH Attorney, 1.0 FTE, is bilingual in English and Spanish.

Explain "Other".: When FLASH clients require services in a languages other than Spanish or English, friends or family members of the client, Justice Corps members, or other JDC staff provide informal

interpretation.

2.c. Was there a need for services in additional languages beyond those that the project was able to provide? If so, which ones? The overwhelming majority of FLASH clients are monolingual Spanish-speakers or are fluent in English. FLASH also provided assistance to clients whose primary languages are Cantonese, Mandarin, Vietnamese, Tagalog, or Russian. Those clients were assisted by volunteer interpreters as noted above.

3. Litigant Assistance

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

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

Partnership Grant Pro Rata Calculation (Part 1)

Goals and Actuals (Part 2)

3.a. Goals and Actuals

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

Goals and Actuals			
	Goal (Full grant period)	Actual (Reporting period)	Pro Rata (Reporting period)
Total Number of Workshops provided	0	0	NaN
Total Number of Individuals served	196	127	NaN
Total Number of Individuals who received one-on-one services (not including family members and others impacted)	196	127	NaN

3.b. Were all goals met?:

☐ Yes

☒ No

1. Goal for total number of workshops provided annually: 0

Actual total number of workshops provided annually:

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

Actual total number of individuals served through workshops annually:

3. Goal for total number of individuals who received one-on-one services annually (Not including family members and others impacted): 195

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

3.c. If goals were not met, explain why:

We did not reach our goal for number of individuals served and provided with one-to-one assistance in 2023 because the FLASH Attorney position was vacant for 4 months of the 12-month grant period. JDC's Family Law Supervising Attorney, Lisa Wolter, who formerly served as the FLASH Attorney, was promoted in November 2022. The FLASH Attorney position was difficult to fill, due to an uncompetitive salary, and the job remained vacant until April 2023. Unfortunately, however, in October 2023, the new FLASH Attorney resigned. In December 2023, JDC was finally able to fill the FLASH Attorney position with recent law school graduate, Jennifer Gomez. Ms. Gomez is fluent in Spanish and English and is a former LSFN Fellow. She has extensive family law experience through pro bono activities and as a Fellow.

FLASH is still not able to conduct workshops at the San Francisco Superior Court's Self-Help Center ("ACCESS"). FLASH is located within the ACCESS offices at the San Francisco Superior Court. ACCESS has prohibited group services since the onset of the COVID-19 pandemic in early 2020.

Services Provided				Actual
Group-Setting Services	# of Workshops	Pro Rata	# of Individuals	Pro Rata
Information on Substantive Legal Options	0	0.00	0	0.00
Information on General Court Processes and Procedure	0	0.00	0	0.00
Document Preparation or Review	0	0.00	0	0.00
Trial/Hearing Preparation	0	0.00	0	0.00
Other	0	0.00	0	0.00

Individually-Delivered (one-on-one) Services	# of Individuals	Pro Rata
Information on Substantive Legal Options	127	52.07
Information on General Court Processes and Procedure	127	52.07
Document Preparation or Review	120	49.20
Filing Assistance	100	41.00
Mediation/Settlement Assistance	0	0.00
Trial/Hearing Preparation	25	10.25
Post-Trial/Hearing Assistance	0	0.00

Other	0	0.00
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Explain "Other":

4. Referrals

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

Referred To	Number of Individuals Referred
Another legal aid provider	0
Court-based provider of legal information, such as the Self-Help Center	0
Private Bar (LRS of individual private lawyers not affiliated with program)	0
Provider of human or social services (non-legal)	0
Other source of assistance, none of the above	5

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

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

Explain "Other": With the exception of a small number of clients referred to FLASH by JDC, the great majority of clients served by FLASH are referred by the court's ACCESS center. ACCESS staff screen clients, complete an intake form and check eligibility criteria prior to making referrals to FLASH. In a handful of cases, there is an error and ACCESS may refer a client who is not eligible due to income level or type of service requested. On these rare occasions, the individual is referred back to ACCESS.

Additionally, in a few cases, FLASH may refer a client to JDC for full-scope representation if the client does not appear capable of advocating for him or herself at required hearings or, for any reason, requires representation. Clients served through FLASH's assistance on the court's Family Centered Case Resolution (FCCR) calendar have been pre-screened for income and other eligibility criteria. The bottom line is that clients referred to FLASH have already been through a string of referrals and gone through an intake process. Therefore, they are nearly always ideally placed and best served by FLASH without need for further referral.

5. Resource Materials

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

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

Cheat_Sheet_for_Filing_for_Customer.docx

14.6 KB - 03/07/2024 2:44PM

FLASH_Intake_2024.pdf

162.3 KB - 03/07/2024 2:45PM

Total Files: 2

5.b. Briefly describe each resource material.

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

The FLASH Filing Cheat Sheet is a document designed to remind clients of the forms that need to be filed in a divorce case and in what sequence. This handout is in English and Spanish and provides a framework for clients to keep track of what documents will be needed next, which documents must be filed with the court, and which documents must be served on the opposing party.

The FLASH project Intake Sheet is an essential program tool used by ACCESS staff. The form has been updated to reflect changes in our income eligibility requirements and in our staffing. This fillable form ensures that all clients referred by ACCESS to FLASH meet eligibility criteria. It also serves to expedite the client's initial interview with the FLASH Attorney.

FLASH will resume staffing of the FCCR calendar in March 2024. As her predecessors have done, Ms. Gomez will attend the FCCR hearings and provide the court with a written document containing a summary of all FLASH eligible cases prior to the hearing date.

6. COVID-19

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

Select all that apply.

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

Explain "Other": The Court's ACCESS Center has undergone significant changes in reaction to the COVID-19 Pandemic. Prior to the Pandemic, ACCESS was open to walk-in clients mornings and afternoons at

least 3 days per week. Additionally, pre-Pandemic, ACCESS regularly provided divorce-related workshops (including Beginning Dissolution, Financial Disclosures, and Default Judgment) while FLASH provided the Mandatory Settlement Conference Workshop at the ACCESS Center. Additionally, prior to March 2020, during its open hours, ACCESS opened its doors for one-to-one appointments with staff attorneys, paralegals, and Justice Corp.

Since March 2020, all ACCESS staff works on a hybrid basis. The ACCESS Center is open to sign-up for appointments 3 mornings a week, from 8AM to 9:30AM. The appointments are then conducted remotely. It is also possible to contact ACCESS via a survey on their website, or to use live chat (which is available 3 days a week from noon to 3PM), or to call a helpline 3 days a week from 8AM to 11:30AM. This system does not serve FLASH clients as they are often monolingual Spanish speakers, have little or no education or access to technology, and/or have schedules incompatible with limited ACCESS hours as they work one or more jobs and have children in day care. Additionally, the ACCESS Center no longer permits workshops, or any services rendered in a group setting.

These changes have made it difficult for clients who were able to walk into the ACCESS Center, complete an intake in English or Spanish, and make an appointment with FLASH all in one day pre-COVID.

Form C - Evaluation

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

Select all that apply.

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

Explain "Other": The Family Law Supervising Attorney, Lisa Wolter, conducts spot checks with FLASH clients throughout the year. Ms. Wolter provides an informal consult via telephone for random FLASH clients and for some with complications requiring her expertise. During the consult she asks questions about FLASH services to ensure quality control and solicit feedback about project operations.

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

From the initiation of the FLASH program until the onset of COVID-19, the FLASH Attorney was situated inside the Superior Court full-time. Originally, the Court provided a small office adjacent to the ACCESS Center, FLASH was later relocated to a desk inside the ACCESS Center. Prior to March 2020, any litigant visiting the ACCESS Center who qualified for FLASH

services was directly referred to FLASH and given an appointment. Since March 2020, however, the ACCESS Center has functioned primarily remotely with reduced courthouse staff. The referral system from the ACCESS Center to FLASH remains completely remote, with the ACCESS Center staff triaging litigants remotely and emailing the FLASH Attorney the intake form. Due to this barrier, which is especially impactful for low-income monolingual Spanish-speakers without technical acumen, the FLASH program probably receives fewer referrals overall and certainly receives fewer referrals for clients facing linguistic and technological barriers.

During the duration of the FLASH program, FLASH has assisted the court with various calendars and workshops: the Self-Represented Litigants Calendar, the Mandatory Settlement Conference Workshop, and, currently, the FCCR calendar, which serves as the court's "status check" on cases that have not arrived at a judgment within 18 months of filing the Petition for Dissolution. The FLASH Attorney reviews all income eligible cases on the FCCR calendar prior to the hearing date, then drafts and provides a short procedural summary for each of those cases to the court.

During COVID-19, when the court required or encouraged remote appearances, the FLASH Attorney appeared on the FCCR calendar remotely. Currently, the FLASH Attorney appears in person at the FCCR hearings on the second and fourth Mondays of every month at 1:30pm and 2:30pm. FLASH assists the judge with self-represented litigants on the calendar and offers FLASH assistance to eligible litigants. Almost without exception, the litigants contacted in court or via the court's Zoom link are glad to accept FLASH's offer of free legal assistance and agree to participate in the FLASH program to finalize their case. These procedures were still in place in 2023.

Through this additional outreach to low-income individuals, the FLASH attorney has been able to partially compensate for the greatly reduced referrals from the ACCESS Self-Help Center and reach the intended FLASH customer base directly.

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

Unfortunately, due to the changes described above, FLASH specific surveys were not distributed in 2023. All JDC clients, including FLASH clients, receive a quarterly general satisfaction survey via email. In our experience, FLASH clients are not able to identify the program name when requested to do so. Therefore, returned surveys rarely distinguish between FLASH and other JDC family law programs.

Prior to COVID-19, we distributed a FLASH-specific paper survey to every client during the client's final in-person FLASH appointment and collected it prior to the end of that appointment. Since taking FLASH services remote, however, we have struggled with how to get surveys to FLASH clients who often meet with FLASH remotely. We are aware that text surveys get better responses than email surveys. Unfortunately, our budget does not allow for the purchase of the software necessary to implement surveys by text. Finally, any type of survey distribution other than an in-person, paper method will likely meet with very few responses from FLASH clients as they are overwhelmingly disadvantaged in at least one of the following areas: education, language, access to technology, and lack of time and resources (as they are working long hours at low-wage).

Beginning in 2024, we plan to reinstitute the paper survey as we expect that our new FLASH attorney will meet with every client at least once in person. We are also exploring funding sources to support a text message-based survey system, which we hope will improve all JDC project client response rates.

4. Satisfaction Surveys

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

JDC_Client_Survey_2023_Responses.docx

214.9 KB - 03/07/2024 2:47PM

JDC_Client_Survey_Jan_2024_Responses.docx

214.9 KB - 03/07/2024 2:47PM

Total Files: 2

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

127

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

0

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

Overall, clients expressed satisfaction with FLASH services in conversation with the FLASH Attorney and ACCESS Center staff.

5. Court Partnership

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

As described above, the court's ACCESS staff are responsible for screening and referring clients to JDC's FLASH project. JDC's Family Law Supervising Attorney, Lisa Wolter and Director/Managing Attorney for Pro Bono Legal Services, Antonia More, meet regularly with the ACCESS Center Director, Judy Louie, to discuss inter alia, scheduling, court policies, and changes to the Local Rules and to California law that affect dissolution and other matters impacting FLASH clients. The FLASH Attorney maintains a presence at the courthouse and interacts with filing clerks, courtroom clerks, and the judiciary. FLASH is an integral part of the court's ACCESS Center team.

Operational changes have been made to the FLASH schedule and place of work based on the ACCESS Center's scheduling changes described above. Currently, the ACCESS Center's Director is requesting that FLASH limit its presence at the shared ACCESS Center office located in Room 512 of the courthouse. The ACCESS Director's goal is to limit the number of people in the room. The ACCESS Center has stated there is no other space available for FLASH use at this time, so our services have remained mostly remote. In 2024, we hope to find space at the courthouse where we may resume in-person FLASH services.

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

There are periodic meetings between the Unified Family Court judges and administrator, ACCESS Center staff, JDC FLASH Attorney, JDC Family Law Supervising Attorney, and JDC Director of Pro Bono Legal Services. Generally, these discussions center on current needs for family law assistance among self-represented litigants and whether and how Court procedures can enhance FLASH services. In 2023, the majority of these meetings were held via videoconference or telephone. In-person meetings occurred twice but were largely informal in nature. The content of these meetings included: staff introductions, ACCESS Center procedures, California Family Law updates, Local Rules and Court procedural updates, and meeting the needs of the customer population when most meetings must be conducted remotely per ACCESS Center rules.

There are no pending unresolved issues.

6. Additional Evaluation Method

6.a. Describe the additional evaluation method that was implemented for this project (e.g. courtroom observations, focus groups,

court/case file reviews, time/efficiency studies, economic impact analysis, etc.), the data that was collected and how it was analyzed, and any key findings or lessons learned.

N/A

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

(For Reference) Prior Reported Expenditures
Reported Expenditures from the 2022 Evaluation Reported Expenditures from the 2023 Evaluation

Other Evaluation Materials (Optional)

1. Demographics

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

Worksheet_in_JDC_-_State_Bar_Partnership_FLASH_-_2023_Evaluation_Narrative_Contents_-_03-07-2024.xlsx
391.2 KB - 03/07/2024 2:49PM

Total Files: 1