

# **PARTNERSHIP GRANT REQUEST FOR PROPOSAL REQUIREMENTS**

## **I. BACKGROUND INFORMATION**

The State Budget Act allocates funds to the Equal Access Fund *“to improve equal access and the fair administration of justice.”* The Equal Access Fund is given to the Judicial Council to be distributed through the State Bar of California’s Legal Services Trust Fund Program (LSTFP). Ten percent of the funds available for distribution will support Partnership Grants to legal services programs for *“joint projects of courts and legal services programs to make legal assistance available to pro per litigants.”*

Unlike IOLTA grants, Partnership Grants are awarded through a competitive process. The Legal Services Trust Fund Commission (Commission) reviews Partnership Grant applications and makes recommendations regarding funding to the Judicial Council. Grants are awarded for a one-year period commencing January 1. Historically, grants have been awarded in the range of \$25,000 to \$80,000.

Partnership Grants are intended to be seed money to support projects that will eventually be funded from other sources of revenue. Applicants must describe plans for obtaining funding from other sources to support these projects. Funding is typically reduced in the third, fourth, and fifth years in which an applicant is approved for a grant. The Commission will not provide Partnership Grant funding for the same project for more than five years except under extraordinary circumstances, such as in rural areas where the need is particularly high, yet alternative funding is unavailable, or to serve areas hit by disaster.

## **II. ELIGIBILITY REQUIREMENTS FOR PARTNERSHIP GRANTS**

There are four basic eligibility requirements for Partnership Grants:

1. Qualified Legal Services Projects (QLSPs). Only QLSPs are eligible to apply for Partnership Grants (Business & Professions Code 6210 et seq.).
2. Joint Court/Legal Services Program Projects. Proposals must be for projects jointly developed and implemented by courts and legal services programs, and, except in rare circumstances, services must be delivered at or near the courthouse.
3. Indigent Persons. Use of Partnership Grant funds is restricted to the provision of services to indigent persons as defined under Business and Professions Code §6213(d).
4. Self-Represented Civil Litigants in State Court. Use of Partnership Grant funds is restricted to providing assistance to individuals who are pursuing matters in state court without representation by counsel. These funds cannot be used to make court appearances on behalf of litigants.

### III. SELECTION CRITERIA FOR PARTNERSHIP GRANTS

The Commission has full discretion to recommend grant awards based on its analysis of the need within the communities to be served, the extent to which the proposal addresses all the issues identified in the RFP, and consideration to fund a range of projects that represent diverse geographic areas, substantive issues, and client constituencies. Decisions of the Commission, as approved by the Judicial Council, are final. There is no appeals process.

In its review, the Commission will consider how effectively the proposal addresses the following issues:

1. Impact of Services. The project must address the needs of the targeted population and achieve meaningful and timely outcomes.
2. Collaboration with Cooperating Court. The project must be jointly undertaken with the court. The Commission will consider the extent to which the applicant and cooperating court will collaborate on this project to achieve access for self-represented litigants.
3. Integration with Court-Based Services. The applicant's services, or planned services, should be integrated with other court-based services, including the Family Law Facilitator, self-help centers, and other offices of the cooperating court.
4. Court's Impartiality. The proposal must ensure the court's independence and impartiality. If the project's services are to be reserved for only one litigant role, such as petitioners but not respondents, or defendants but not plaintiffs, the applicant must demonstrate that it has thoroughly explored all the implications of this decision with the court, and identified alternate legal resources that can provide equivalent levels of assistance to the opposing parties.
5. Conflict of Interest. If the project establishes an attorney-client relationship with the self-represented litigants, it must provide meaningful referrals for individuals who are not eligible to use the services because they present a conflict of interest for the project.
6. Information and Referrals. The project must address the methods by which it will provide information and referrals to litigants who are not eligible to use its services for any reason.
7. Additional Support. In anticipation of the eventual reduction or termination of Partnership Grant support, the applicant must diligently pursue other means for continuing the project. The Commission will consider efforts to pursue other sources of funding and support, as well as contributions actually received, such as commitments of the program's general operating revenue, recruitment of pro bono volunteers, and in-kind support.
8. Evaluation. All applicants must incorporate evaluation plans into their Partnership Grant proposal and complete a Year-End Evaluation Report.

# Sample Application

Grant Year: 2017

Due Date: 2016-05-03 17:00

## Prepared by: Test Consultant

Project Title: **Test 2017**  
Program Name: **Organization**  
Applicant Title: **Court Partnership**  
Address: **180 Howard Street 5th Floor**  
City: **San Francisco**

Email:  
Contact Phone:

I verify the information in the Organization Profile is accurate and up-to-date.

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

## Form A - Project Profile

Open the tabs and complete the fields on forms A through F as concisely and completely as possible. Only questions marked with an asterisk (\*) are mandatory to submit the application, however complete answers to all questions is encouraged to avoid the need for undue follow up or the potential denial of your grant application

1. Lead Project Staff:

Job Title:

Email:

Telephone:

County(ies) Served by this  
Project

3. Total Amount Requested:

### Partner Court(s) and Project Location(s)

Partner Court	Name of Location	Address	On-Site Days/Hours	Total Hours/Month
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5. Is the project currently funded by a Partnership Grant?

Yes/No

a. Select Project for Refunding

6. Project Abstract: Provide a brief description of the core aspects of your proposed project. This abstract will be submitted in summaries provided to the Legal Services Trust Fund Commission and the Judicial Council.

## Form B - Project Description

Answer the following questions as concisely as possible. The answers must be self-contained. Do not refer the reader to any other documents.

1. Program's Qualifications. What is the applicant program's experience providing assistance to self-represented litigants, including court-based services?

2. Needs Assessment. Describe the demographics of the target community, the geographic area to be served by the project, and why the target population is in particular need of the services to be provided.

3. Types of Services to be Provided.

a. Describe the legal issues to be addressed, and the type and level of services to be offered by the project. How will the planned services address the needs identified?

b. Identify any new resource materials to be developed, the individual(s) who will be responsible for preparing those materials, and how they differ from materials already posted, i.e., at

[www.courts.ca.gov](http://www.courts.ca.gov) , [www.lawhelpca.org](http://www.lawhelpca.org) or [www.CAlegaladvocates.org](http://www.CAlegaladvocates.org).

c. Describe language capabilities among staff and any plans for developing resource materials in multiple languages. If the service population includes persons who are monolingual in a language staff does not speak, explain how the project will ensure services are available to those persons.

d. Describe how you will communicate the availability of services to litigants and the community.

e. What changes have been made to the project since it was first funded with a Partnership Grant and why? (applicants for refunding only)

f. Provide information about current and planned collaboration on this project with other legal services programs and other types of organizations in the community.

4. Goals and Objectives.

1. Total number of workshops provided annually:

2. Total number of individuals served through these workshops annually:

3. Total number of individuals who received one-on-one services annually (not including family members and others impacted):

Services and Resources	Goal	
	# of Workshops/Annually	# of Individuals/Annually

Information on Substantive Legal Options

Information on General Court Processes and Procedure

Document Preparation or Review

Trial/Hearing Preparation

Other (describe in Question 4b)

Individually-Delivered (one-on-one) Services	# of Individuals/Annually
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Information on Substantive Legal Options

Information on General Court Processes and Procedure

Document Preparation or Review

Filing Assistance

Mediation/Settlement Assistance

Trial/Hearing Preparation

Post-Trial/Hearing Assistance

Other (describe in Question 4b)

Other Services	# of resource materials	# distributed
Resource Materials		
Other (describe in Question 4b)		

b. Describe services identified above as "Other." If any of the other numbers in the chart above require explanation, provide the additional explanatory text here.

c. Identify any anticipated goals for the project not quantified in the chart above.

d. If you will be providing workshops, please describe the format for those workshops. For example, discuss whether you will utilize video conference, or online document assembly. What is the goal of each workshop and how do you hope the customer will benefit?

## 5. Location.

a. Services must be provided at the courthouse except in rare circumstances. Will services be provided at the courthouse?

Yes/No

If no, explain why services cannot be located at the court and measures that will be taken to ensure litigants follow-up with assistance received and otherwise overcome the distance barrier.

b. Will all services strictly be provided at the project site?

Yes/No

If no, what services will be provided or completed off-site?

6. Quality Control, including Supervision.

a. Describe the staffing and supervisory structure for the project, identifying key personnel if possible. If onsite supervision is not possible for project staff, describe the steps that will be taken to ensure the highest levels of quality control.

b. If the project is designed to utilize volunteers, indicate whether these will be attorneys, paralegals, law students, etc. Describe the work volunteers will undertake and explain how they will be trained and supervised.

c. If the project includes document preparation, how will the project ensure that documents are completed correctly? Will the documents be reviewed by project staff, and if so, who will conduct the review, and when will the review be conducted?

d. If a sub-grant of any Partnership Grant funds is envisioned, provide details for that arrangement, including plans for oversight and evaluation of the services provided by the sub-grantee.

7. Income Eligibility Guidelines. Explain how the project will verify income eligibility to ensure that Partnership Grant funds are only used to serve indigent individuals. (B&P Code 6213(d))

8. Attorney-Client Relationship.

a. Do you plan to establish an attorney-client relationship?

Yes/No

c. If yes, describe the protocols that will be used to check for conflicts and how individuals will be served in the event a conflict is identified, i.e., referrals to a conflict panel, independent contractor, etc.

d. If no, explain how litigants will be made aware of the scope of services to be provided and how customers will be informed that an attorney-client relationship will not be established.

9. Impartiality of the Court.

a. Do you expect to serve only one party or side of a matter?

b. If yes, which party or side of the matter do you plan to serve?

c. If yes, explain why the project has established this limitation. What steps have been taken to explore all implications of this decision, and address any risk of an appearance of impropriety on the court's part?

10. Alternative Services. Describe the methods to be used to screen for subject matter eligibility, and explain how the project will otherwise address the needs of unrepresented litigants. What information will be available for litigants who are ineligible for services due to income, subject matter, or residency? If the plan is to provide referral, explain how referrals will be made in situations where the project cannot provide services, such as serving only one party, lack of resources to provide service to all who seek it, or where a conflict arises.

11. Collaboration and Partnership with the Court.

a. Identify the general areas of responsibility that the court has agreed to assume.



b. Describe plans for meeting with court personnel to discuss both substantive and logistical issues as they arise. Coordination meetings should be scheduled no less often than quarterly and should be conducted with formal agendas.

12. Timetable. Describe the proposed timetable for implementation of the project by quarter for the grant year. (new projects only)

13. Evaluation. Provide a detailed plan describing how the project's services will be evaluated. The plan should include both an assessment of the benefit of the project's services for those seeking assistance, as well as the impact of funded services on the court. Identify the specific methodologies you will use to evaluate and improve services, e.g., interviews with self-represented litigants, court personnel or other partners, surveys, case file review, etc.

14. Project Continuity.

a. Typically grants will be reduced after three years of operation, and will not be funded for more than five years. Describe plans to obtain other sources of funding to cover a portion of the project's costs after three years of operation.

b. List all funding sources that have been approached in the last twelve months, the amounts requested, and the revenue actually raised for project operations. Specifically identify any funds that were obtained by leveraging the Partnership Grant.

c. Grants are awarded after the fifth year of funding only in rare and exceptional circumstances. Any applicant seeking funding beyond the fifth year must describe the circumstances that justify continued funding. (projects past fifth year of funding only)

## Form C - Project Budget

Click on the Open button below to enter the project budget information. For detailed instructions on completing the project budget and budget narrative, including a description of each line item, refer to the Application Instructions. Click on the Application Instructions button above.

Account Title	Proposed Partnership Grant	Other Trust Fund Monies	Non-Trust Fund Monies	Total
<b>Personnel</b>				
1. Lawyers	\$0	\$0	\$0	\$0
2. Paralegals	\$0	\$0	\$0	\$0
3. Other Staff	\$0	\$0	\$0	\$0
4. SUBTOTAL	\$0	\$0	\$0	\$0
5. Employee Benefits	\$0	\$0	\$0	\$0
6.TOTAL PERSONNEL	\$0	\$0	\$0	\$0
<b>Non-Personnel</b>				
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. Audit	\$0	\$0	\$0	\$0
18. Evaluation	\$0	\$0	\$0	\$0
19. Contract Service to Clients	\$0	\$0	\$0	\$0
20. Contract Service to Organization	\$0	\$0	\$0	\$0
21. Other	\$0	\$0	\$0	\$0
22. TOTAL NON-PERSONNEL	\$0	\$0	\$0	\$0
TOTAL AMOUNT OF FUNDS	\$0	\$0	\$0	\$0

Project Staff	Partnership Grant (in FTEs)	Other Trust Fund Monies (in FTEs)	Non-Trust Fund Monies (in FTEs)	Total (in FTEs)

<b>1. Lawyers</b>				
Lawyer 1				0.00
Lawyer 2				0.00
Lawyer 3				0.00
Total Lawyers	0.00	0.00	0.00	0.00
<b>2. Paralegals</b>				
Lawyer 4				0.00
Lawyer 5				0.00
Total Paralegals	0.00	0.00	0.00	0.00
<b>3. Other Staff</b>				
Lawyer 6				0.00
Lawyer 7				0.00
Total Other Staff	0.00	0.00	0.00	0.00
TOTAL PERSONNEL(in FTEs)	0.00	0.00	0.00	0.00

### Form D - Budget Narrative

Provide an explanation for each line item in the project budget, including the basis for allocations. While the Project Budget form does not include the value of in-kind support, please include any significant in-kind support, such as the use of court facilities or equipment, in the budget narrative. Any expenses entered under Contract Service to Clients (row 19), Contract Service to Organization (row 20), and Other (row 21), must be itemized and explained.

<b>Personnel</b>		
Account Title	Proposed Partnership Grant	Narrative
1. Lawyers	0	
2. Paralegals	0	
3. Other Staff	0	
4. SUBTOTAL	0	
5. Employee Benefits	0	
6.TOTAL PERSONNEL	0	
<b>Non-Personnel</b>		
Account Title	Proposed Partnership Grant	Narrative
7. Space	0	
8. Equipment Rental and Maintenance	0	
9. Office Supplies	0	
10. Printing and Postage	0	

11. Telecommunications	0
12. Technology	0
13. Program Travel	0
14. Training	0
15. Library	0
16. Insurance	0
17. Audit	0
18. Evaluation	0
19. Contract Service to Clients	0
20. Contract Service to Organization	0
21. Other	0
22. TOTAL NON-PERSONNEL	0
TOTAL AMOUNT OF FUNDS	0

Form E - Project Assurances

Please download the Assurances document and upload a signed copy below. Please upload PDF files only.

Upload Signed Assurances Document:

Form F - 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.

Upload Letter(s) of Support:

Upload MOU(s):

Additional Supporting Documents