

Grant Year: 2017

Due Date: July 1, 2016 at 5:00pm PST

Prepared by: Applicant

Project Title: **2141-IOLTA LSP-2017-Test BriCo Legal Services234-178**
Program Name: **Test BriCo Legal Services234**
Applicant Title: **Program Director**
Address: **180 Howard Street 5th Floor**
City: **San Francisco**

Email: **Applicant@calbar.ca.gov**
Contact Phone: **415-538-2252**

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 guidelines for IOLTA funding for legal services projects.

I. Eligibility Criteria

1. Applicant is applying for:

Renewal of Funding as a Legal Services Project

2. Applicant is: (choose one)

A nonprofit corporation that provides civil legal services to the indigent without charge as its primary purpose and function

An identifiable unit of a law school accredited by The State Bar of California that provides civil legal services to the indigent without charge as its primary purpose and function, and has operated for at least two years at a cost of at least \$20,000 per year

Upload a letter of support from the law school dean describing the history of the law school clinical program.

3. Applicant is applying for eligibility as: (select all that apply)

II. Description of Organization

Provide a comprehensive description of the entire organization. Do not limit responses to activities funded by the Legal Services Trust Fund Program. Please click "Save & Finish Later" after adding counties.

List of County(ies) Served

County

Alameda

Calaveras

1. What is the organization's mission and vision?

2. What client population does the organization serve? Include demographic information, such as age, gender, ethnicity, income levels, and any other characteristics particular to the service population.

3. How does the organization verify and document an individual's income eligibility for services? Identify all income criteria and guidelines used to establish eligibility for services.

4. Which of the programmatic activities below did the organization engage in during the previous calendar year? Do not include fundraising and administrative activities (Eligibility Guidelines 2.3). (choose all that apply)

a. Legal Services Activities

b. Non-Qualified Activities

i. Legal Services:

ii. Other Services:

III. Staffing and Volunteers

Staffing as of December 31

Personnel Category	Full-Time Staff	Part-Time Staff		Total Staffing FTEs	Temporary Staff		Volunteers	
		Number of people	Full-Time Equivalent		Number of people	Total Hours	Number of people	Donated Hours
Attorneys				0.00				
Paralegals				0.00				
Law Students				0.00				
Professional Services				0.00				
Clerical/Admin				0.00				
Other Personnel				0.00				
TOTAL	0	0	0.00	0.00	0	0	0	0

1. For each position included above under Professional Services and Other Personnel, state the title and full-time equivalent of the position(s).

Words
Words
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Words

2. Describe how the organization utilizes non-legal professionals in its service delivery model.

Words

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3. How many hours per week does the organization consider a full-time schedule?

40.00

4. Describe any significant changes in staffing levels or structure in the previous calendar year, and its impact on programmatic activity. Identify any significant vacancies over the previous calendar year and explain whether the organization is actively recruiting for the position, or is holding the position for budgetary or other reasons.

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IV. Application for Pro Bono Allocation

To qualify for the pro bono allocation in the county(ies) in which the organization provides services, the organization must recruit at least 30 attorneys, recruit at least five percent of the licensed attorneys in the county served, or receive at least 1,000 hours of donated legal services from volunteer attorneys, and demonstrate that its principal means of delivering legal services is “the recruitment of attorneys in private practice to provide free legal representation to indigent persons or to qualified legal services projects in California” through one of the three tests described in Eligibility Guideline 2.9.

1. Does the organization coordinate the recruitment of substantial numbers of attorneys in private practice to provide free legal representation to indigent persons or to qualified organizations as its principal means of delivering legal services?

Yes

Alameda				
POSITION	PAID		VOLUNTEER	
	PEOPLE	HOURS	PEOPLE	HOURS
Eligibility Results for Alameda county				
Test A	NO			
Test B	NO			
Test C				

Calaveras				
POSITION	PAID		VOLUNTEER	
	PEOPLE	HOURS	PEOPLE	HOURS
Eligibility Results for Calaveras county				
Test A	NO			
Test B	NO			
Test C				

2. Describe how the organization obtains and maintains information about hours of service donated by volunteers. If the organization

does not have written documentation corroborating the legal services hours reported, explain the basis of the reported figures. For example, if the organization relies upon estimates, provide the elements that were factored into the calculations.

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3. If the applicant does not count all staff hours worked as legal services hours, for each paid staff position, explain the method used to calculate the number of legal services hours and, with respect to each county, describe the general nature of the non-legal services activities.

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V. Quality Control Review

Has the organization received a written quality control review from the Legal Services Corporation, the California Department of Aging, or an Area Agency on Aging in the previous calendar year?

Yes

Upload the quality control reports issued by the Legal Services Corporation, the California Department of Aging, or an Area Agency on Aging in previous calendar year.

Describe case opening and closing oversight practices.

Describe how legal services staff are supervised to ensure quality service. Identify supervisory personnel and provide information regarding their oversight (frequency of case management meetings, etc.). If there is only one staff attorney or the organization only employs contract attorneys, describe how oversight and quality control are ensured.

Describe the method(s) by which volunteers (attorneys, paralegals, and law students) are supervised. If the organization does not actively supervise volunteers or review their work product, how does the organization ensure compliance with its quality standards?

VI. Sources of Funding

Sources of Funding	
Source	Amount Received

Individual Contributions	
Attorneys	\$5,000,000
Special Events	\$0
Other	\$0
Total	\$5,000,000
Organizations	
Bar Associations	\$0
Law Firms	\$0
Law Schools	\$0
Other	\$10
Total	\$10
Foundations	
	\$0
	\$0
	\$0
Other Foundation Funding	\$10
Total	\$10
Legal Services Corporation	\$0
Area Agency on Aging	\$0
Total	\$0
Government Resources	
Federal (not LSC or OAA)	
	\$0
	\$0
	\$0
Other Federal Funding	\$0
State	
	\$0
	\$0
	\$0
Other State Funding	\$0
Cities and Counties	
	\$0

	\$0
	\$0
Other City and County Funding	\$0
Total	\$0
Residual and Cy Pres Awards	
State Court	\$0
Federal Court	\$0
Total	\$0
Fees and Reimbursements	
Attorneys' Fees	\$0
Client-Paid Amounts	\$0
Cost Reimbursements	\$0
Other Professional Fees	\$0
Total	\$0
Other Cash Support	
	\$0
	\$0
	\$0
	\$0
Total	\$0
TOTAL OF NON-TRUST FUND REVENUE	\$5,000,020

VII. Total Corporate Expenditures

Organization's Fiscal Year End: January 14

1. Qualified expenditures will be calculated based on the Organization's most recent audited or reviewed financial statement ended in the prior year. Applications for 2017 funding must include the audited or reviewed financial statements for the Organization's fiscal year ending in 2015. The Organization is required to submit a current audited or reviewed financial statement within 90 days of the end of its fiscal year.

See Application Instructions for further details and information.

Total Corporate Expenditures

NON-CASH	Expenditures
In-Kind/Donated Services	\$10,050
Unrealized Gains/Losses	\$0
Other	\$100
Total Non-Cash Items	\$10,150
PERSONNEL	Expenditures
Lawyers	\$502,555
Paralegals	\$0
Other Staff	\$0
Subtotal	\$502,555
Employee Benefits	\$0
Total Personnel	\$502,555
NON-PERSONNEL	Expenditures
Space	\$0
Equipment Rental and Maintenance	\$0
Office Supplies and Small Equipment	\$0
Printing and Postage	\$0
Telecommunications	\$0
Technology	\$0
Program Travel	\$0
Training	\$0
Library	\$0
Insurance	\$0
Audit	\$0
Litigation	\$0
Depreciation	\$105
Contract Service to Clients	\$110
Contract Service to Program	\$120
Other	\$100
Total Non-Personnel	\$435
TOTAL EXPENDITURES (Personnel + Non-Personnel +Non-Cash)	\$513,140
TOTAL QUALIFIED CORPORATE EXPENDITURES (Personnel + Non-Personnel)	\$502,990

Itemize all expenses included under other (Non-Cash).

Please itemize all expenses included under Depreciation.

Please itemize all expenses included under Contract Service to Clients.

Please itemize all expenses included under Contract Service to Program.

Please itemize all expenses included under Other (Non-Personnel).

VIII. Qualified Expenditures

Qualified Expenditures

Questions	Amount	Explanation
1. Total Qualified Corporate Expenditures from the previous fiscal year	\$502,605	
2. Did the corporation engage in activities other than the delivery of legal services?	\$234	
3. Did the corporation lease or sublease space to another organization?	\$35	
4. With regards to leased or subleased space, did the organization incur property management expenses, whether as primary owner or lessor?	\$462	
5. Did you provide legal services in criminal matters?	\$246	
6. Did you charge clients for any legal services in civil matters, other than requiring payment for costs and expenses or processing fee of \$20 or less?	\$6	
7. Did you provide any free civil legal services to persons who were not indigent as defined in B & P Code Section 6213(d) and Eligibility Guidelines 2.3.3 and 2.3.4, or to organizations not providing benefits primarily on behalf of indigent?	\$0	
8. Did you provide free civil legal services outside California?	\$0	
9. Did your organization incur expenses that did not contribute to the provision of civil legal services to indigent people and that were not itemized above?	\$0	
10. TOTAL EXPENDITURES FOR NON-QUALIFIED ACTIVITIES	\$983	
11. SUB-TOTAL OF EXPENDITURES FOR FREE CIVIL LEGAL SERVICES TO INDIGENT PERSONS IN CALIFORNIA	\$501,622	

12. PERCENT OF EXPENDITURES FOR FREE CIVIL LEGAL SERVICES TO INDIGENT PERSONS

99.80%

a. If the percentage of expenditures for free civil legal services to indigent persons calculated above is less than 75 percent, explain the organization meets the primary purpose requirement for funding (B&P §6213(a)).

13. Did the organization exchange funds with another legal services project that is applying for a Legal Services Trust Fund Program grant?

Search Programs

Yes

Monies paid to another qualified legal services project

Trust Fund Monies			
Recipient	Amount Credited to Applicant	Amount Credited to Partner QLSP	Total Amount
	\$0	\$0	\$0
	\$0	\$0	\$0
Non-Trust & Non-Shriver Fund Monies			
Recipient	Amount Credited to Applicant	Amount Credited to Partner QLSP	Total Amount
	\$0	\$0	\$0
	\$0	\$0	\$0

Monies received from another qualified legal services project

Payor	Amount Credited to Applicant	Amount Credited to Partner QLSP	Total Amount
	\$0	\$0	\$0
	\$0	\$0	\$0

c. Upload all agreements pertaining to the funds exchanged with another qualified legal services project.

14. TOTAL DEDUCTION OF EXCHANGED FUNDS

\$0

15. If the organization received funding for a grant (or subgrant/subcontract) for a pilot project pursuant to the Sargent Shriver Civil Counsel Act of 2009, enter the amount received.

\$10

16. TOTAL EXPENDITURES FOR FREE CIVIL LEGAL SERVICES TO INDIGENT PERSONS IN CALIFORNIA

\$501,612

17a. IOLTA Expenditures Net of Capital Additions

\$20

17b. EAF Expenditures Net of Capital Additions

\$30

17c. EXPENDITURES OF TRUST FUND MONIES NET OF CAPITAL ADDITION EXPENDITURES

\$50

18. TOTAL NON-TRUST FUND EXPENDITURES FOR FREE CIVIL LEGAL SERVICES TO INDIGENT PERSONS IN CALIFORNIA

\$501,562

Please upload any additional documents regarding the information entered in this form.

VIII-A. Expenditures by County

Total Expenditures for Free Civil Legal Services to Indigent Persons in California

\$501,562

Alameda

County Expenditures (Fiscal year)	IOLTA Expenditures (Previous calendar year)	EAF Expenditures (Previous calendar year)	Qualified Expenditures
\$5,000	\$200	\$300	\$4,500

Calaveras

County Expenditures (Fiscal year)	IOLTA Expenditures (Previous calendar year)	EAF Expenditures (Previous calendar year)	Qualified Expenditures
\$4,000	\$10	\$20	\$3,970

1. Explain the basis for the allocation of expenditures by county. Be specific about how the amounts allocated to each county were calculated. If more than one method for allocating expenditures was used, describe each method and list the amounts allocated by method separately. Please refer to the instructions for further direction.

IX. Certifications & Assurances

Upload Signed
Certifications &
Assurances Document:

Supporting Documents (Optional)

When naming optional supporting documents, please include the Organization's acronym (or short name) and a 1-5 word description of the file.