

Grant Year: 2017

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

Prepared by: Applicant

Project Title: **2134-IOLTA SC-2017-Test Lorna Legal Services-238**
Program Name: **Test Lorna Legal Services**
Applicant Title: **Program Director**
Address: **180 Howard Street**
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 support centers.

I. Eligibility Criteria

1. Applicant is applying for:

Renewal of Funding as a Support Center

2. Organizations that were not in operation prior to December 31, 1980 must be deemed of special need every third year. Did the organization, as an incorporated nonprofit legal services support center, provide a significant level of legal training, legal technical assistance, or advocacy support to qualified legal services projects without charge through an office in California on a statewide basis prior to December 31, 1980?

No

3. Date the organization was last deemed of special need by a majority of qualified legal services projects:

a. Has the organization been deemed of special need by a majority of the qualified legal services projects in the last two calendar years?

Yes

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.

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

2. What are the organization's service priorities?

3. What is the organization's area(s) of substantive expertise?

4. Which types of legal support services does the organization provide (See Guideline 2.2.1., 2.3)? (select all that apply)

If Other, please explain.

5. In the last calendar year, did the organization provide services that did not constitute legal support to qualified legal services projects or attorneys in private practice providing legal services without charge to indigent persons?

Yes

a. If yes, describe the nature of those services.

6. Describe how the organization ensures services are available to qualified legal services projects statewide.

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	10	10	3.00	13.00			50	10000
Paralegals	1			1.00				
Law Students	2			2.00				
Professional Services					1	50		

Clerical/Admin					1	12		
Other Personnel								
TOTAL	13	10	3.00	16.00	2	62	50	10000

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

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

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.

IV. Annual Assistance Summary

Training: List all training events

Role	Subject	Date	Location	Number of Attendees	Number of QLSP Attendees	Number of Different QLSPs served
Training	Fun	05/01/2016	Place	100	5	3
				100	5	3

Consultations and Technical Assistance

	Total Number of Individual Requests for Service	Number of Different QLSPs Served
Brief Services/Consultation	34	2
Extensive/In-Depth Assistance	5	3
Research	2	6

Advocacy Support at the Request of a QLSP

a. Upload a description of the ten most significant cases or matters in which the organization provided representation assistance in the previous calendar year. Include all information identified in the instructions.

b. Upload a description of the organization's ten most significant legislative and administrative advocacy activities in the previous calendar year. Include all information identified in the instructions.

c. Upload a description of the organization's ten most significant impact or class action matters in the previous calendar year. Include all information identified in the instructions.

d. Describe the organization's other advocacy activities.

Task Force Meetings

Name of Task Force	Number of Meetings	Number of Participants	Number of Different QLSPs Participating	Applicant's Role
Team A	4	1	52	
	4	1	52	

a. If a significant amount of time was invested in task force activities, explain how the task force work fits into the organizational priorities to provide support services.

Resources to QLSPs

6. State how QLSPs are made aware of the availability of services.

a. Upload copies of at least two written communications sent to each QLSP in the previous calendar year describing the services the organization provides.

7. How many individual QLSPs did the organization provide assistance to in the previous calendar year?

List of QLSPs

Program	Branch (if applicable)	Number of Services		
		Training	Technical Assistance	Advocacy Support

V. Quality Control Review

Has the organization received a written quality control review from a non-Trust Fund Program funding source or entity issued in the previous calendar year?

Yes

Describe how legal staff are supervised. Identify supervisory personnel and provide information regarding their oversight, quality assurances, and professional ethical responsibilities. Explain how management ensures staff is providing quality legal training, legal technical assistance, and advocacy support. If there is only one staff attorney, or the organization employs only 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	\$50,100
Special Events	\$0
Other	\$0
Total	\$50,100
Organizations	
Bar Associations	\$0
Law Firms	\$0
Law Schools	\$0
Other	\$0
Total	\$0
Foundations	
	\$0
	\$0
	\$0
Other Foundation Funding	\$0
Total	\$0
Government Resources	
Federal	
	\$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
Registration Fees		\$0
Publication Sales		\$0
Cost Reimbursements		\$0
Contracts and Other Professional Fees		\$0
Total		\$0
Other Cash Support		
		\$0
		\$0
		\$0
		\$0
Total		\$0
TOTAL OF NON-TRUST FUND REVENUE		\$50,100

VII. Total Corporate Expenditures

Organization's Fiscal Year End:

May 31

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	\$100,000
Unrealized Gains/Losses	\$0
Other	\$100
Total Non-Cash Items	\$100,100
PERSONNEL	Expenditures
Lawyers	\$0
Paralegals	\$0
Other Staff	\$105
Subtotal	\$105
Employee Benefits	\$0
Total Personnel	\$105
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	\$10
Contract Service to Clients	\$0
Contract Service to Program	\$2
Other	\$110
Total Non-Personnel	\$122
TOTAL EXPENDITURES (Personnel + Non-Personnel + Non-Cash)	\$100,222
TOTAL QUALIFIED CORPORATE EXPENDITURES (Personnel + Non-Personnel)	\$227

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

Please itemize all expenses included under Depreciation.

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	Instruction	Explanation
1. Total Qualified Corporate Expenditures from the previous fiscal year	\$227		
2. Did the organization engage in activities other than legal training, legal technical assistance, or advocacy support without charge to qualified legal services projects and/or other qualifying entities?	\$5	Identify the non-qualifying activities or services, and explain how that amount was calculated. Include not only salaries and direct expenses but also itemize all related indirect costs and overhead.	
	\$0	List these activities or services and the corresponding expenses, and explain how the amount was calculated, including not only salaries and direct expenses but also all related indirect costs and overhead.	
3. Did the organization charge for any of its legal training, legal technical assistance, or advocacy support services?			
	\$0	List the materials and the corresponding expenses, and explain how the amount was calculated, including not only salaries and direct expenses but also all related indirect costs and overhead.	
4. Did the organization charge for any of its publications or resource materials?			
	\$0	Explain how the amount was calculated, including the expenses reimbursed and the source of reimbursement.	
	\$0	Itemize all expenses incurred, and explain how the amount was calculated, including not only salaries and direct expenses, but also all related relevant share of mortgage or lease payments.	
5. Did the organization receive reimbursement for any expenses incurred providing legal training, legal technical assistance, or advocacy?			
	\$0		
6. Did the organization incur expenses as manager, lessor, or sub-lessor of property?			
	\$0		
7. Did the organization incur expenses that did not contribute to the			

provision of legal support services to qualified legal services projects and that were not itemized in the questions above?

Explain how this amount was calculated.

8. TOT EXPENDITURES FOR NON-QUALIFIED ACTIVITIES	\$5
9. TOTAL QUALIFI EXPENDITURES	\$222

10. PERCENT OF EXPENDITURES FOR FREE LEGAL TRAINING, LEGAL TECHNICAL ASSISTANCE, AND ADVOC SUPPORT

97.8%

a. If the percentage of expenditures for free legal training, legal technical assistance, and advocacy support calculated above less than 75 percent, explain how the organization meets the primary purpose requirement for funding (B&P sec 6213(b)).

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

IX. Certifications & Assuran

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.