



LEGAL AID INFRASTRUCTURE & INNOVATION 2021-2022 MID-GRANT CYCLE REPORT

JANUARY 2023

2021

2022



Legal Aid Infrastructure & Innovation 2021-2022 Mid-Grant Cycle Report

January 31, 2023

Number of Organizations Funded: 47

Total Amount Allocated for Funding: \$4,950,000

The California Access to Justice Commission is pleased to provide this mid-year report to the Judicial Council, reporting on services provided in the first six months of this grant program.

I. Background

In 2021, the State allocated through the Judicial Council \$5 million of Equal Access Funds for distribution by the California Access to Justice Commission for Infrastructure and Innovation grants to legal services organizations. Eligible organizations are those that provide civil legal aid to persons at or below 200% of the federal poverty threshold, including both IOLTA and non-IOLTA funded organizations. The legislation prioritizes services to rural and immigrant populations, and to organizations that work with community partners. With these parameters, the Commission focused on projects that would have a long-term impact by giving organizations the boost they need to reach their next level of operational or programmatic maturity. Many organizations have for years starved their own infrastructure, and these grants are an important opportunity to invest in needed upgrades to their hardware and software systems to increase efficiencies and accomplish integration of case management, accounting, human resource and other functions. In other cases, these grants are facilitating bigger picture thinking that allows grantees to test innovative new ways to provide services to indigent communities.

II. Summary of Diversity Characteristics



INFRASTRUCTURE vs. INNOVATION

70% Infrastructure (33)
30% Innovation (14)

*Total LOI =
67% Infrastructure
33% Innovation*



GEOGRAPHY

17 Statewide
5 Central Valley*
16 Northern California
16 Southern California

**5 LOI received to serve the
Central Valley*



ORGANIZATION SIZE

5 < \$1MM*
11 \$1-2MM
16 \$2-5MM
15 > \$5MM

**8 LOI received for orgs with a
budget <\$1 MM*



LEGISLATIVE PRIORITIES*

32 Rural
36 Immigrant
24 CBO Partnership

**Many Applications include
multiple priority areas. 14 orgs
are purely rural and 11 serve
only immigrants.*



IOLTA vs. NON-IOLTA

77% IOLTA (36)
23% NON-IOLTA (11)

*Total LOI =
75% IOLTA
25% NON-IOLTA*



PRO BONO

19 Pro Bono

Total LOI = 23

III. Highlights

This report is based on first and second quarter narrative and financial reports submitted by grantees for the period April 1 through September 30, 2022. As expected, grantees that invested in system upgrades needed time to engage staff and outside stakeholders to assess needs and meet procurement requirements before entering hardware, software and vendor contracts. Additionally, across the nonprofit legal aid sector, the inability to hire legal aid attorneys has reached critical levels, and it took time for some grantees to recruit the attorney or other personnel with the skill sets to meet their project deliverables. By the end of the second quarter, grantees had found their stride, and we are pleased to outline a few of the many highlights below, followed by a description of all of the grantee's accomplishments during the first six months of the grant.

1. Improving Efficiencies Through IT Upgrades

Twenty-five organizations used grant funds primarily to buy hardware or manage complicated software upgrades, including 17 programs that primarily are focused on upgrading their case management, human resource and accounting functions, with a goal of updating, streamlining and in many cases, integrating those functions. Upgrading

technology is time-consuming and expensive, yet in the long run, keeping technology up to date to facilitate daily business processes is critical to efficient operations. With these grants, grantees will improve their planning capacity, have more accurate reporting, foster contract compliance and increase data security. Integrating systems eliminates communication silos, prevents cross-communication errors, and saves time by allowing one task to be completed in one business solution that crosses business units. Importantly, by reducing time spent on repetitive tasks, employees are freed to focus on more meaningful work: Boosting staff morale while increasing and enhancing client services is one of the most important outcomes of system upgrades.

While hardware purchases were generally to support grantee internal processes, grantees also took advantage of grant funds to support direct services to clients.

- **Using iPads to Support Remote Intake.** To manage outreach more effectively, Legal Aid of Marin purchased 10 iPads to bring to all their outreach events, thereby streamlining the intake process – by allowing for conflicts checks on-site; enabling effective referrals to other nonprofits; decreasing the time between intake and opening clients matters; and also supporting remote Community Court hearings.

2. Website Development to Share Resources

Ten programs used grant funds primarily to devise innovative ways to update their website, including improving accessibility and creating tools for end users. These websites become part of the broader legal aid statewide ecosystem providing shared tools and resources for clients, legal aid or pro bono attorneys in unique specialty areas. Below are a few examples of the many ways that programs are expanding the legal aid infrastructure through their website development.:

- **County-condition expert witness database of asylum cases.** With grant funds, Center for Gender and Refugee Studies - California improved its online searchable database of country-condition expert witnesses for asylum seekers by adding tools, resources and search features to help both attorneys and expert witnesses easily find relevant results. It is currently strategizing how to better serve Spanish-speaking experts and attorneys.
- **Critical Social Science Evidence to Support Appellate DV Cases, and Amicus Briefs.** Family Violence Appellate Project has begun its website redesign to provide different landing pages for each distinct user group – pro per litigants and attorneys. It has begun tagging documents using defined parameters for a search algorithm to eliminate the need for staff to individually field inquiries and pull appropriate documents in response to TA requests. Organizing the database of searchable materials will also benefit advocates internally.
- **Employment Law Resources for Clients.** Legal Aid at Work (“LAAW”) has begun work on its online Employment Law Navigator (“Navigator”). It created mock-ups of the proposed design, with a particular focus on the critical question-and-answer flow for the Navigator tool to lead visitors to the appropriate resources. At the same time, LAAW is working with its regular web developers to ensure the back-end infrastructure supports the new website, including identifying a translation plugin for the website.

3. **Programmatic and Geographic Expansion of Direct Services**

- With these funds, many programs expanded their capacity to provide direct services, either by deepening the geographic reach of their programs, particularly into rural areas, or expanding the programmatic reach of the work to devise new ways to serve clients.
- **Expanding Geographic Reach to Serve Rural Areas.** Oasis opened a satellite office in Fresno to bring services to an estimated 10,000 undocumented LGBTQ+ immigrants in the Central Valley. Prior to Oasis Legal Services' opening its Fresno office, there were no legal aid offices that could serve this constituency. In the first six months of the grant, Oasis has built a coalition of over 30 partners to foster culturally competent warm referrals between agencies. It can now provide a comprehensive array of legal and social services, including but not limited to asylum representation.
- **Expanding Services in Remote Rural Detention Centers Leads to Impact Litigation.** California Collaborative for Immigrant Justice (CCIJ) expanded both its geographic and programmatic reach with grant funds. CCIJ expanded outreach to additional detention centers, and is serving detained immigrants in Kern and Imperial Counties. While providing individual services, CCIJ is tracking systemic abuses in those detention centers to identify and support individuals who are eligible to bring a lawsuit under a new law that creates a private right of action for detained immigrants to sue private detention operators for care violations. In the meantime, CCIJ itself (with partners) has filed a lawsuit challenging private detention operators' practice of paying detained immigrants \$1/day to provide janitorial services and other labor. Additionally, CCIJ and partners helped detained immigrants file complaints with the DHS Office of Civil Rights and Civil Liberties, seeking an investigation into claims of retaliation. Sixteen members of CA's congressional delegation have supported an investigation.

Quote from Oasis: "Clients who have already won legal status approached us . . . to express their excitement to see us there, as well as the need for our physical presence in the Central Valley. Several of those screened during the first quarter were referred by former or existing clients. With 86% of Oasis clients coming via word-of-mouth referrals, these connections are key."

A case example: CCIJ successfully fought to free Donald. Donald is an LGBTQ asylum seeker from Costa Rica, who had experienced severe medical neglect at Imperial Regional Defense Facility. He needed emergency surgery and showed signs of possible permanent nerve damage. CCIJ built a detailed record of the medical neglect and Donald's complex medical needs. The CCIJ attorney convinced an immigration judge to grant Donald release on bond to get the care he needs. Donald is now living with a sponsor while he awaits a decision in his case.

- **Creating Legal Aid Capacity to Obtain a Share of Retirement Benefits for Clients in Dissolution.** During this period, Harriett Buhai with its partner QDRO Counsel launched a new program to teach legal aid, court self-help and pro bono

attorneys to obtain a share of pension benefits during dissolution for their indigent clients. Prior to this grant, legal aid organizations (and even some private practitioners) have largely stayed away from this area of law because of its complexity, yet retirement benefits are often the largest asset in a marriage especially for low and moderate-income persons. Depending on circumstances, a low-income client's share of pension benefits can be \$500-\$1,500 a month, or in some circumstances may instead result in lump sum payments of \$5,000-\$40,000. This can be the difference between being financially insecure in retirement and affording a decent standard of living. During the first six months, QDRO Counsel trained over 100 lawyers from legal aid, and court self-help centers both on the substantive legal issues surrounding dividing pension benefits and on use of the free QDRO software licenses provided as a part of these sessions.

- **Expanding Pro Bono in Rural Areas.** OneJustice is building out systems for connecting more volunteers with rural opportunities, working with Inland Counties Legal Services, Legal Services of Northern California, and California Rural Legal Assistance, to design homelessness prevention pro bono clinics. Planning thus far has focused on creating, testing, and refining technology needs assessments, developing community outreach plans, assessing and analyzing the number of staff needed at clinics, streamlining clinic administrative processes, and developing training plans and resources.

4. *Improving Communications and Client Outreach*

A number of organizations focused on utilizing technology to enhance their outreach, intake and communications with clients. In recognition that an estimated 80% of low-income people use their cell phones for obtaining information, including to access social media sites, five organizations focused on improving communications with clients, including through text messaging.

- **Updating Telephone System to Enable Texting.** As noted by one staff person at Alameda County Homeless Advocacy Center about accomplishments under grant funds: "It's impossible to quantify, but our clients greatly appreciate the ability to text, and having an official texting phone number makes communication so much better qualitatively and quantitatively!"
- **Using Text Messages to Assess Client Outcomes from Brief Services.** Working closely with three partners serving Los Angeles and Inland Counties, Neighborhood Legal Services of Los Angeles ("NLS") developed an ambitious project to collect region wide outcome data from clients through text message surveys. This newfound ability to get feedback on how brief services affect client outcomes will allow legal aid organizations to better understand the impact of their brief services and will inform future programming. Because of the project's potential impact, NLS engaged Margaret Hagan of Stanford Law School's Legal Design Lab to design the client outcome surveys for clients experiencing housing issues.

5. *Supporting a Dedicated Workforce and Fostering Recruitment and Retention*

Five grantees have embarked on projects that foster staff development, with goals to increase recruitment and retention or to improve diversity, equity and inclusion within the organization, including in one case, a fellow with lived trafficking experience. Three

grantees propose working to develop new protocols to advance diversity, equity and inclusion, including in one case for persons with disabilities. One program seeks to expand the advocates available to provide eviction defense by creating a progression of job responsibilities, including mentoring and supervision. Below are some sample leadership development projects:

- **Hiring a Fellow with Lived Experience.** The Coalition to Abolish Slavery and Trafficking (CAST) hired a one-year Legal Fellow with lived trafficking experience to bring perspective to their legal services delivery. As part of CAST's Learning Hub model, the Legal Fellow's input will be harnessed to develop and advocate for better human trafficking policies as well as provide insight on new policy implementation. After 40 hours of intensive training, the Legal Fellow is now working with the CAST staff attorney to conduct factual intakes for potential clients, and has been working directly with clients to provide immigration relief, and on the emergency response by hotline. The CAST fellow has also attended monthly legal team meetings to participate in case discussions and to bring lived experience to ways to improve services.
- **Creating a New DEI Leadership Structure.** Disability Rights Education and Defense Fund (DREDF) will create a new leadership structure to continually develop generations of diverse disabled leaders within and outside of DREDF. During the grant period, DREDF drafted job descriptions for the leadership team, opened self-nominations to join the team and began planning. New leaders attended a three-day Nonprofit Leadership Bootcamp and engaged a Team Coach. Legal Aid Society of San Mateo County (LASSM) is also focused on building a more diverse leadership team. It is re-examining recruiting, hiring, professional development, and promotion practices with a focus on diversity, equity, inclusion, and belonging. LASSM has revised its job descriptions, and through its Race Equity Initiative, developed a resource guide for handling difficult clients, launched an onboarding buddy program for new employees, and worked on an annual employee engagement survey.
- **Developing a Pipeline of Legal Aid Housing Attorneys.** Inner City Law Center (ICLC) is laying the groundwork for scaling up the number of attorneys doing Right to Counsel (RTC) work first in Los Angeles, with the goal of making it available throughout the state. In the last six months, ICLS created a detailed outline and initial draft of a Litigation Handbook, and prepared a draft of a skills ladder for housing attorneys.

The outcomes of these infrastructure and innovation grant projects will not truly be known until after the grant closes and grantees have an opportunity to see the long-term impacts on their organization. The projects described above are only a small sampling of the important groundwork laid for the future with these grant funds. Below is a summary description of all of the important achievements of the grantees. A list of the broad categories of projects and the grantees who are doing work within those categories is included as Attachment A.

IV. Summary of Grant Progress and Achievements to Date

Work Proposed and Accomplished	
Description	Grants \$
<p>AIDS Legal Referral Panel of the San Francisco Bay Area (“ALRP”) will use grant funds to transition its database from an old, crash-prone Access platform, to a Salesforce platform that will provide greater security, reliability, and remote access. The database tracks ALRP’s attorneys and cases, donors and volunteers, and is vital to the provision of civil legal services to more than 1,300 clients living with HIV each year.</p> <p>Accomplished ALRP launched its database migration project on April 1 and has now completed the discovery phase. Consultants worked with each ALRP team to understand their processes and database needs, and wrote “User Stories” to provide a snapshot of the functionality required by each user. The team wrote 150 stories to capture the comprehensive needs of ALRP staff, and consultants are now developing the new database to ALRP’s needs, relying on frequent meetings with ALRP’s “database architect.” The project is on track to meet the projected budget and timeline.</p>	\$90,000
<p>Alameda County Homeless Action Center (“Alameda HAC”) will use funds for critical infrastructure support to enhance communications. HAC will transform its current phone system to include much-needed texting capabilities to improve accessibility for homeless clients, while allowing the cloud phone system adopted during the pandemic to provide full functionality for drop-in center services and in-office staff.</p> <p>Accomplished During the reporting period, Alameda HAC identified direct-routing providers to meet their SMS texting need, and substantially completed re-cabling and installation of conduit drops at both offices to accommodate a Teams-compatible IP phone at each workstation and each client meeting area to support the new text-capable phone system. As noted by one staff member, “It’s impossible to quantify, but our clients greatly appreciate the ability to text, and having an official texting phone number makes communication so much better qualitatively and quantitatively!”</p>	\$76,000
<p>Alliance for Children's Rights (the “Alliance”) provides critical legal services to underserved children, youth, and families in the child welfare system and proposes to transform its case management system to facilitate an intake that is more efficient and responsive to the needs of clients. The Alliance will update its intake process to accurately determine the needs and legal assistance required to eliminate barriers to sharing information, and open cases for effective case management.</p>	\$190,000

<p>Accomplished</p> <p>During this reporting period, Alliance staff has been meeting regularly with its conversion consultant to identify what fields it should migrate from Prime into LegalServer, and how to organize the information. After this critical process, the Alliance anticipates that it can move swiftly through the next stage of the conversion process, including developing its survey to capture current baseline measures, and to track service delivery to facilitate improvement in workflow and efficiencies.</p>	
<p>California Advocates for Nursing Home Reform (CANHR) proposes to fund the modernization of CANHR's website, including features such as translation software, and a document assembly program to assist seniors and their caregivers in resolving civil matters such as Medi-Cal Recovery, residents' rights complaints, and demand letters related to eviction or discharge. The project will expand consumer education resources in Spanish, Chinese, Japanese and Vietnamese related to eviction and illegal discharge, Medi-Cal for long term care, and options to avoid institutionalization.</p> <p>Accomplished</p> <p>CANHR has completed a comprehensive review of its website, and developed a work plan to undertake content review and design. It contracted with translators and completed the final layout and distribution of new language fact sheets translated for residents of nursing homes and assisted living facilities. These fact sheets were also disseminated to legal services programs across the state, as well as social workers and health advocates. These educational materials are now available in Spanish, Chinese, Vietnamese and Japanese.</p>	\$100,000
<p>California Collaborative for Immigrant Justice (CCIJ) will expand its capacity to serve detained immigrants housed in rural areas of California, who are often held in for-profit detention centers in remote areas, far from legal counsel, their families and communities. CCIJ will provide legal advice and referrals to immigrants detained in the Imperial and Central Valley regions. CCIJ will also track systemic abuses in those detention centers and support individuals who are eligible to bring a lawsuit under AB3228, a new law that creates a private right of action for detained immigrants to sue private detention operators in California who violate the standards of care in their contracts.</p> <p>Accomplished</p> <p>With grant funds, CCIJ expanded its capacity to serve detained immigrants in the more isolated parts of the State, including Kern and Imperial counties. CCIJ was able to hire an experienced new staff attorney, who in the first few months has taken cases that have impact for the entire detained community. For example, highlighting medical neglect and malpractice in one case can lead to a change in protocols that will benefit all detained individuals. Increased consultations also led to identifying the need for a class action</p>	\$200,000

lawsuit challenging private detention operators' practice of paying detained immigrants \$1/day to provide janitorial services and other labor.	
<p>California Indian Legal Services (CILS) which provides legal services to indigent Native populations, will use grant funds to initiate and complete the migration of its archaic case management system (CMS) data to LegalServer. It is critically important for any legal service organization to have an updated high functioning, robust CMS. Using LegalServer will save a significant amount of staff time that is currently being used on outdated and time-consuming systems and processes. The time saved will go directly to serving more clients in the indigent and vulnerable Indian communities throughout California.</p> <p>Accomplished CILS issued a Request for Proposal for the selection of a new Case Management System, and based on a comparison, selected LegalServer. CILS built its project team to identify use cases and design the new system, and is onboarding with LegalServer to outline and prioritize activities, and has begun data migration.</p>	\$50,000
<p>California Rural Legal Assistance Foundation, Inc. (CRLAF) will pursue greater efficiency in tracking and record-keeping methods. CRLAF will get assessments to transition from a multiple software system to more updated, integrated platforms and to address internet connectivity needs. Simplifying back-end processes will ease clients and staffs' experience, and increase overall reach throughout rural California. Streamlining communications and reporting systems will make it easier to track progress toward deliverables, manage individual cases and client communication, and services to legal services and partner organizations.</p> <p>Accomplished To begin the assessment process, CRLAF put together a comprehensive list of current technologies and began an assessment of how these systems might be improved, integrated and simplified. Consultants identified hardware in need of replacing and the need to update to fiber internet and servers for greater efficiency. CRLAF also began investigating Customer Relation Management (CRM) options. Replacing inadequate hardware and software has improved overall organizational capacity and communications. During this reporting period, CRLAF also worked on its long-term strategic communications to farmworker and migrant communities.</p>	\$78,000
<p>California Rural Legal Assistance, Inc. (CRLA) will expand financial and data management capacity by reducing administrative inefficiencies and improving service data capture within CRLA's case management system (CMS), LegalServer. To further improve data input within LegalServer, a training series on the principles of data, evaluation and outcomes measurement will be provided to all staff. CRLA anticipates that investing in this front-line staff education will enhance data collection, increase individual</p>	\$80,000

<p>staff investment in the process and its outcomes, and ultimately improve and expand legal services for low-income, rural clients.</p> <p>Accomplished The CFO of CRLA conducted a detailed assessment of how their CMS and budgeting software can be integrated to improve. Additionally, during this period CRLA set up an advanced Grants Management Module to facilitate financial management, data capture and grant reporting. CRLA also has assembled training resources to teach staff effective program evaluation and outcomes thinking. CRLA retained OneJustice to review the assembled resources and will recommend learning paths for staff on outcomes thinking, logic modeling and conducting program evaluations.</p>	
<p>Center for Gender and Refugee Studies - California, Inc. (CGRS-CA) has developed an innovative—first-of-its-kind in the field of asylum law—online searchable database of expert witnesses. The tool is designed to streamline how legal services providers connect with asylum experts. The database currently holds more than 312 (68 of whom are California based) pre-vetted experts ready to provide testimony. Expert witness reports and testimony are integral to building and winning an asylum case, enabling advocates to better secure protections for their clients and advance asylum law generally. CGRS-CA will expand the database and make technical improvements identified through user feedback.</p> <p>Accomplished During this reporting period, CGRS-California with its web developers made exciting improvements to the user interface of its expert witness database, designed to serve those representing asylum seekers, including: adding more tools and search filters to help both attorneys and expert witnesses easily find relevant results; integrating this database into its existing online library and added a resource page with relevant webinars and other materials exclusively dedicated to experts. CGRS is strategizing how to be more linguistically inclusive to accommodate Spanish speaking experts and attorneys.</p>	\$75,000
<p>Central California Legal Services, Inc. (CCLS) will use funds to improve clients' lives by creating system/program efficiencies through an expanded technological infrastructure, including basic wiring. Staff will be trained on new systems, and ABA best practices will be used for ongoing project evaluation and modification.</p> <p>Accomplished CCLS completed installing its wiring, firewalls, media converters and organization-wide WiFi at all three offices for every workstation. Additionally, it added GIS Mapping features to LegalServer, and completed its RFP for an IT assessment and security audit. In the last quarter, CCLS also completed its upgrades to its pro bono module, including an electronic process to request pro bono services, team tracking and pro bono assignments.</p>	\$170,000

<p>Centro Legal de la Raza (Centro Legal) leads regional collaboratives, serves as administrator for crucial safety net consortia, provides critical direct legal services, and incubates smaller organizations. After a period of exponential growth, Centro is in need of new case management and accounting systems to sustain their growth and expanded leadership role. Investing in data infrastructure will improve services, and equip Centro to track trends for advocacy and analyze equity in services, impacting thousands of low-income residents and supporting systemic change. Upgrading its accounting system will ensure compliance and capacity as a fiscal lead.</p> <p>Accomplished Centro Legal convened its project management team and launched the discovery phase for a new case management system. It released an RFP and investigated vendors for the case management, accounting and migration process. During this period, Centro Legal also examined options for third party integrations, such as form filling to ensure staff can conduct case management efficiently. Lastly, Centro Legal also developed its evaluation measures.</p>	<p>\$125,000</p>
<p>Coalition to Abolish Slavery and Trafficking (CAST) will hire a one-year Legal Fellow who will also be a survivor of human trafficking. The fellow will work within CAST’s Legal Department and will provide lived experience perspective to legal services delivery – something which it believes has never been done before in California. The Legal Fellow’s support will increase staff attorneys’ capacity to take on more clients. As part of CAST’s Learning Hub model, the Legal Fellow’s input will be harnessed to develop and advocate for better human trafficking policies at local and national levels as well as provide insight on new policy implementation.</p> <p>Accomplished In the first quarter, CAST posted for and hired a Legal Fellow with lived experience. After about 40 hours of intensive training, the Legal Fellow has begun working with the CAST staff attorney. The Fellow is helping to conduct factual intakes for potential clients, and has been working directly with clients to provide immigration relief, and on the emergency response by hotline. The CAST fellow has also attended monthly legal team meetings to participate in case discussions and to bring lived experience to ways to improve services.</p>	<p>\$70,000</p>
<p>Contra Costa Senior Legal Service (CCSLS) seeks more reliable data about seniors in the county who need their legal services. It proposes to secure a consultant to design and conduct an innovative, replicable needs assessment survey specific to older adults. This process will help it better understand barriers preventing low-income seniors from resolving their civil legal problems. Data findings will be used to improve outreach and services, and result in a Toolkit to be shared widely within the legal community.</p>	<p>\$71,000</p>

<p>Accomplished CCSLs struggled to find a consultant to conduct a community awareness assessment within the budgeted amount. After adjusting its budget, CCSLS was ultimately able to hire a consultant and during the reporting period, it completed the survey and managed a county-wide mailing to 5,000 seniors, as well as mailed flyers through the John Muir Community Health Fund. The response rate as of the end of the reporting period was less than hoped, and CCSLS with its consultant is strategizing additional outreach, and supplementing with “listening sessions.”</p>	
<p>Disability Rights Education and Defense Fund (DREDF) will create a new leadership structure intended to ensure that their leaders reflect the community that they serve. While discrimination affects all disabled people, marginalized disabled people of color experience far greater discrimination, segregation, and exclusion than those who are white. DREDF believes that leadership must come from people of all ages, ethnicities, disabilities, job type, and tenure because diversity not only leads to better and more equitable delivery of legal services, it will help build our capacity to continually develop generations of diverse disabled leaders within and outside of DREDF.</p> <p>Accomplished DREDF drafted job descriptions for the leadership team, opened self-nominations to join the team and began planning. New leaders attended a three-day Nonprofit Leadership Bootcamp and engaged a Team Coach. The Leadership team also began drafting new policies and procedures and approved an evaluation plan and calendar. After the evaluator interviewed leaders, planning began for a leadership retreat and other professional development opportunities. The team is working on Leadership Team policies and procedures.</p>	\$66,000
<p>East Bay Community Law Center (EBCLC) has rapidly expanded to meet the ongoing community need for services. Implementing a Human Resources Information System will fully digitize all human resource and payroll functional areas and provide greater accuracy, efficiency, and a more positive and transparent employee experience, enhancing both staff retention and the ability to focus more on direct services to clients. Shifting to a more sophisticated cloud-based fund accounting software will position its financial systems to support anticipated budget growth and staff capacity, improve management of financial activity, and provide more timely information for fiscal accountability and strategic planning.</p> <p>Accomplished EBCLC has completed onboarding of a new Chief People & Culture Officer and Deputy Director of Finance who together analyzed the functions necessary to fully digitize human resource and accounting functions to streamline employee access to their personnel information. They formally engaged Paylocity as the HRIS system to streamline hiring, onboarding,</p>	\$115,000

<p>payroll and offboarding, and are currently analyzing options for integration of the accounting software.</p>	
<p>East Bay Sanctuary (EBSC) will create an accessible and efficient digital immigration-legal-services model to complement their in-person services. The proposed technology-based improvements will allow them to more effectively reach and manage a larger client pool beyond the Bay Area; increase accessibility to services through their website and mobile texting platforms; strengthen digital legal case management systems; improve training programs and how they collaborate among staff and volunteers in serving low-income immigrants; and strengthen how they use data to improve programs, communicate impact, and sustain the organization.</p> <p>Accomplished During the period, EBSC began its website design with 4 volunteers from the UC Berkeley Extension, researching users, defining problems and ideating solutions. Two of the design volunteers will work with web developers to implement the design. The team is working on a repository of training videos and materials, including some content in Spanish and Mam and is upgrading its elmmigration case management. Additionally, EBSC is expanding its communications with clients through MobilePathways. It has researched hardware purchases, and is in the process of digitizing its paper records, which will facilitate client referral and improve client outcomes.</p>	<p>\$130,000</p>
<p>Elder Law & Advocacy (EL&A) will create a new website that will transform how it interacts with seniors, their families and caregivers, attorneys, and other senior service organizations. With online intake capability, fillable forms, interactive assessments, multiple language accessibility, and potentially kiosks installed in rural parts of San Diego and Imperial Counties, EL&A will provide up-to-date and critically needed information to help seniors access the information they need to avoid being scammed, defrauded, or otherwise victimized and to both educate and empower them as they address legal concerns and challenges.</p> <p>Accomplished An ELA steering committee surveyed ELA staff, volunteers, and Board members to gain input as to website needs, and engaged other organizations in discussions about selecting a vendor through a RFP process. Ultimately, they contracted with a consultant to assist ELA with the drafting of an RFP. ELA has received 15 proposals and interviewed 3 vendors, including the vendor that was selected.</p>	<p>\$140,000</p>
<p>Family & Children's Law Center (FACLC) will increase its capacity to provide critical legal services to low-income clients in need of Special Immigrant Juvenile Status (SIJS) predicate orders, domestic violence legal services, and family law services. SIJC predicate orders have a life-changing and long-term impact on Unaccompanied Minors by stopping removal proceedings and creating a viable path to U.S. permanent residency.</p>	<p>\$76,000</p>

<p>Domestic violence restraining orders are a critical component for stopping cycles of violence in Marin County, where FACLC has seen an increase of 50% in requested domestic violence services.</p> <p>Accomplished During the grant period, FACLC greatly increased the number of clients with restraining orders to prevent domestic violence, filed applications for special applicant juvenile status, and conducted family law intakes to obtain custody and visitation orders. FACLC also helped unaccompanied minors to obtain predicate orders and noted an increase in unaccompanied minors released to sponsors in Marin County.</p>	
<p>Family Violence Appellate Project (FVAP) will update its comprehensive website containing client information as well as user-friendly Legal Resource Library for attorneys, to make information more accessible to attorneys, advocates, and survivors to provide better legal outcomes and safety for survivors and their families.</p> <p>Accomplished FVAP spent the first quarter identifying and hiring a Project Manager, and investigating options for developing its website. FVAP worked with three volunteer technology professionals to provide strategies, including developing a job description for a web developer. In the second quarter, FVAP planned the flow and structure, and created a defined set of parameters that would allow the search algorithm to perform as intended. FVAP spent time tagging and categorizing documents so they can easily be added to the Legal Resource Library (LRL). FVAP will create different landing pages for each distinct user group that will offer a tailored search experience. This will ensure that information relevant to each user category will be easy to find.</p>	\$115,000
<p>Harriett Buhai Center for Family Law (HBC) will use funds to create statewide capacity among nonprofit legal service providers and others to divide retirement benefits in divorce, an important but unaddressed asset for low and moderate-income persons, especially women. Through a specialized legal training and education program participants will learn how to divide retirement benefits equitably.</p> <p>Accomplished During this period, HBC and partner QDRO Counsel (QC) designed the training plan and completed work on curriculum materials for its “Dividing Pensions in Divorce Project.” The training information was sent to approximately 250 invitees from legal aid and Court Self-help Centers and during this period HBC has trained over 100 lawyers from legal aid, and court self-help centers both on the substantive legal issues surrounding dividing pension benefits and on use of the QC software licenses granted as a part of these sessions. Training is supported by a robust micro website for prospective participants to have a centralized site with descriptive</p>	\$175,000

<p>information about the purposes of the project, its goals, subject topics, and registration capability.</p>	
<p>Inland Counties Legal Service (ICLS) proposes the development of a mobile-first web-based application for the assembly of dissolution forms for low-income litigants. Direct legal services will be provided to eligible persons. In addition, the app will be shared with community-based organizations, and other legal aids in Riverside and San Bernardino Counties that serve similar populations. The goal is to create a platform that is user-oriented including language and accessibility components for non-English speaking litigants, and persons with disabilities, so that they may proceed with their dissolution and obtain valuable legal information.</p> <p>Accomplished During the first quarter, ICLS retained and trained a staff attorney to develop the Dissodocs application. ICLS continued to use the Afterpattern platform to prepare documents for its mobile-first web-based application for the assembly of dissolution forms for litigants, including the initial dissolution petition, child custody/visitation related attachments, income and expense declarations and more. It is analyzing the use case for these documents after testing with its own staff and members of the Family Law Practice Group.</p>	<p>\$77,000</p>
<p>Inner City Law Center (ICLC) will lay the groundwork for scaling up the number of attorneys doing Right to Counsel (RTC) work first in Los Angeles, with the ultimate goal of making it available throughout the state. The Judicial Council recently issued a report supporting a RTC for low-income tenants facing eviction, but the legal aid community is not adequately prepared to scale eviction staff and service to the level that a RTC would require. ICLC is creating a robust recruiting, training, supervising, and mentoring program to support a full scale RTC.</p> <p>Accomplished The project started in earnest in July after initial difficulty securing an attorney to lead the project. Since coming on board, the attorney has conducted research and created a detailed outline and initial draft of the Litigation Handbook. She has also prepared a draft of the skills ladder and plans to provide additional specifics to make it more usable. She has begun preparing two trainings, which will be recorded for use by legal service providers.</p>	<p>\$110,000</p>
<p>KIND, Inc will leverage community and pro bono networks and technology to provide legal services across California, including the Central Valley; develop a pro bono portal to recruit and train pro bono attorneys and stakeholders on trauma-informed and culturally responsive practices, including language justice. KIND will also improve legal outcomes for children through its program to provide cell phones to foster children's connectivity, provide support, and improve their legal outcomes.</p>	<p>\$150,000</p>

<p>Accomplished KIND is utilizing cross-organization learnings to enhance the overall appearance of the pro bono portal, and, in response to data analysis of pro bono attorney site usage, is implementing a more intuitive way of organizing sample forms. Once complete, these changes will make it easier for pro bono attorneys to navigate the site, and will ensure the most heavily viewed content is easily accessible. Additionally, to further its communications, it expanded its program to distribute cell phones to unaccompanied minors to link them to legal and social services.</p>	
<p>Lawyers' Committee for Civil Rights (SF Bay Area) (LCCRSF) will make critical investments in the tools they need to provide high quality remote and in-person services: up-to-date laptops, printers, Zoom and Adobe licenses, and video/graphic design support. Funding will directly translate to more cases, more victories, more money in clients' pockets, more protection of their livelihoods, and more safety and status for immigrant clients.</p> <p>Accomplished LCCRSF has purchased critical tools such as new laptops, ergonomic desks and chairs, at-home printers/scanners, a portable printer for Asylum Program's clinics, and Adobe, Zoom, and Docusign licenses. A video producer has also been contracted to create a pro bono recruitment video for their Asylum program. Anecdotally, the Operations Team has received grateful and positive feedback from staff. Additionally, with better technology to host remote services, LCCRSF has been able to facilitate new legal clinics and pro bono trainings, including monthly Legal Café's to keep volunteers up-to-date on ever-changing Asylum law.</p>	\$62,000
<p>Leadership Counsel for Justice and Accountability (Leadership Counsel) will expand access to legal services, and support community engagement through workshops that are held simultaneously in-person and remotely. Funding will support increased staffing to provide technical assistance for people joining virtually, and support in-person participation at multiple sites, provide interpretation, and enable the purchase of video-conferencing equipment.</p> <p>Accomplished Leadership Counsel has expanded their hybrid model, hosting three know your rights workshops, 13 individual advice and counsel meetings, and 23 client meetings, reaching people in rural places such as Merced, Delhi, Planada, Livingston, Atwater, Beachwood Franklin, Bakersfield, Delano, Madera, Fresno, and North Shore. They supported resident capacity to engage in remote and virtual meetings by loaning equipment and technical support for on-site and remote meetings. Additionally, they were able to hire interpreters for the KYR workshop using grant resources.</p>	\$100,000

<p>Learning Rights Law Center (LRLC) will upgrade its antiquated accounting infrastructure. A consultant specializing in nonprofit bookkeeping will complete a comprehensive review of the organization’s accounting infrastructure needs and recommend changes to policies and software to achieve streamlined workflows. LRLC will purchase and implement the new software, develop a new accounting manual, and train its staff on the new system.</p> <p>Accomplished LRLC has hired a consultant, Mission Math, who is meeting regularly with the Director of Finance and Administration to identify necessary upgrades in the accounting process, select software, and implement software in stages. They have secured a subscription to Quickbooks Online as the first stage of a "tech stack", or series of overlapping software integrations. Before applying additional software to the stack, our Director of Finance and Administration is working with the consultant to revise the organization's General Ledger codes, and other fundamental building blocks of the accounting process.</p>	\$25,000
<p>Legal Access Alameda (LAA) is the lead agency of the Disaster Legal Assistance Collaborative (DLAC), a partnership network of 27 organizations. Funds will support staff to administer the Free Legal Advice (FLA) virtual advice clinic, DLAC website content, and the DLAC hotline. DLAC programs are open to anyone in California, regardless of citizenship or residency status, and address the wide range of legal issues that disaster survivors face including landlord-tenant, insurance, employment, and public benefits.</p> <p>Accomplished Since April, LAA has fully implemented Salesforce to track volunteer and client information for DLAC. The integration of Salesforce and Mailchimp has improved communication and tracking of volunteer information (e.g., contact lists update automatically per volunteer intake sheets). The DLAC website is under reconstruction with the goal of improving accessibility in terms of language and resources. LAA has hired a full-time attorney to work solely on California FLA and during the report period, 1,489 questions were posted by clients (298 were related to COVID-19 or a disaster).</p>	\$100,000
<p>Legal Aid at Work (LAAW) will build a web-based Employment Law Navigator (“Navigator”) that is accessible to low-literacy populations and persons with disabilities. The Navigator will guide low-wage workers experiencing job-related legal problems to the self-help materials most relevant to their unique legal problems. LAAW will use a human-centered, legal design approach, and will iteratively test versions of it with low-income clients to ensure that it is linguistically, culturally, and otherwise accessible to the vulnerable communities they serve.</p> <p>Accomplished The legal design firm, Theory & Principle (“T&P”), has been contracted to help LAAW create the Navigator. They have been meeting on a biweekly</p>	\$161,000

<p>basis, interviewing key staff, creating wireframe mock-ups, and drafting a question-and-answer flow for the Navigator that will lead web visitors to the best resource(s). LAAW's web developers are working on back-end infrastructure, and have built the new website and ported over 190 factsheets, videos, and other resources. LAAW is also updating their website's translation plugin to make it accessible in languages other than English.</p>	
<p>Legal Aid Foundation of Santa Barbara County (LAFSBC) will use funds to close gaps in technology needs that developed during the pandemic. LAFSBC will upgrade its online intake and case management system, and purchase laptops for attorneys. The project will make it easier for clients to remotely access intake, eliminate inefficiencies/duplication in staff work, and enable attorneys to work in a hybrid environment.</p> <p>Accomplished During this period, LAFSBC purchased and set up five laptops and docking stations for employees. Laptops have allowed attorneys to use the same secure computing device at home, at the office, and in court without relying on personal computers, and to share offices and docking stations (maximizing office space use). The project consultant has developed a draft online Intake system which is ready for testing.</p>	\$40,000
<p>Legal Aid of Marin (LAM) will use funds to streamline legal services by using iPads to conduct remote hearings, provide on-site intake conflicts checking, provide referrals to other nonprofit organizations, access translation services, share bilingual flyers; and conduct legal research. The intention is to provide civil legal services to indigent persons where they live, work, and gather.</p> <p>Accomplished During the grant period, LAM ordered 10 iPads and 10 keypads and deployed the resources to all of their regular outreach events, increasing efficiency in services delivery and decreasing the time between intake and client matters opening by at least 24 hours. Staff also used iPad and remote connectivity infrastructure to access remote hearings for Community Court, their anti-poverty diversion docket in partnership with Marin Superior Court. LAM has developed an internal system and policy around checking iPads in and out for use at outreach.</p>	\$27,000
<p>Legal Aid Society of San Diego (LASSD) will revise its website to provide substantive information in more than a dozen different areas of law. The teams that provide services in each of these areas have critical information that is difficult to disseminate through its current website in an efficient and timely manner.</p> <p>Accomplished LASSD selected a website redesign vendor and worked with them to draft wireframe mock-ups and content, set up plugins and integrations to support</p>	\$50,000

<p>events and donations, review drafts with staff, map old site URLs, upload publications, populate the events calendar, and test on different devices. Their redesigned website launched to the public on September 15, 2022. They have requested bids from three translation services to present four key pages of the website in 9 different languages. LASSD is also developing a training module in their learning management system for staff to learn how to access and make basic changes to the site.</p>	
<p>Legal Aid Society of San Mateo County (LASSM) will build a more diverse leadership team and address the general difficulty of recruiting, promoting, and retaining legal aid staff by reexamining recruiting, hiring, professional development, and promotion practices with a focus on diversity, equity, inclusion, and belonging. LASSM will work with a consultant to create a shared professional development plan template, modified position descriptions, and a more transparent professional development and growth path for employees.</p> <p>Accomplished LASSM has engaged a consultant to help achieve staff recruitment, retention, and promotion goals. Per Laurel’s guidance, they reviewed their current position description template, incorporated her suggestions, and shared with the Leadership Team. Their Office Manager standardized a template for job postings that highlights their commitment to diversity, equity, inclusion, and belonging DEIB principles. LASSM’s Race Equity Initiative (REI) Leads developed a resource guide for handling difficult clients, launched an onboarding buddy program for new employees, and worked on an annual employee engagement survey.</p>	<p>\$60,000</p>
<p>Los Angeles Center for Law and Justice (LACLJ) will strengthen its technology infrastructure by updating its case management system. Improvements will help LACLJ meet growing demand from underserved survivors, work more effectively in an increasingly remote/virtual service environment, and make data-driven decisions that enhance its responsiveness and community partnerships.</p> <p>Accomplished LACLJ finalized its retainer with LegalServer. Three LACLJ staff members were selected to administer this process, which includes trainings (function, report building, etc.), meetings with LegalServer, and migrations. LACLJ is modifying online intake to take advantage of branch logic and Guided Navigation tools to decrease the burden on potential clients and optimize the number of eligible applicants they connect with. The CMS transition process has been helpful in eliminating inaccurate/old records and system categories, and gaining a better sense of how information should be organized.</p>	<p>\$145,000</p>

<p>Neighborhood Legal Services of Los Angeles County¹ (NLSLA) is serving as the primary grantee for a partnership between four legal services organizations collectively serving Los Angeles, San Bernardino, and Riverside counties. The Project aims to better track and understand the outcomes of brief services by building an automated system that uses text messaging to gather outcome and longer-term impact data from clients. The three partners include: Legal Aid Foundation of Los Angeles, Mental Health Advocacy Services, and Legal Aid of San Bernardino.</p> <p>Accomplished The Collaborative (NLSLA, LAFLA, MHAS, LASSB) contracted with its common case management database, Legal Server, to begin development of the automated text messaging system. The Collaborative met with leading individuals in the field to learn of best practices and to receive recommendations on potential data collection consultants, and subsequently selected the Consultant, Margaret Hagan, Executive Director of Stanford Law School’s Legal Design Lab. The Collaborative has been meeting with Margaret to develop the framework for the client surveys, the substantive areas, the quantitative methods, and the content of the questions themselves.</p>	<p>\$400,000</p>
<p>Oasis Legal Services (Oasis) works in the Central Valley and will use funds to establish a Fresno satellite office, engaging regional partners to provide a safe space to meet the needs of the hard-to-reach community, and increasing access to life-changing documented status. Oasis clients are asylum seekers who are undocumented, low-income people of color and victims of hate crimes struggling under compounding systems of oppression.</p> <p>Accomplished Oasis’ Central Valley office opened on April 1, 2022, and Oasis is on track to surpass their annual goals. In the first two quarters, they screened 49 individuals for immigration relief and provided direct legal representation to 55 clients. They have connected with at least 18 community organizations serving their client population and are working on establishing relationships with at least 12 more. Their comprehensive resource guide is currently being finalized and is on track to be distributed in the coming months. A number of their former clients have started providing support to other LGBTQIA+ asylum seekers by spreading the word about the new office and providing transportation to it.</p>	<p>\$129,000</p>

¹ Note: This is a collaboration between four legal aid organizations.

<p>OneJustice will build out systems for connecting more volunteers with rural opportunities by working with key rural legal aid organizations on designing their homelessness prevention pro bono clinics. OneJustice will work with Inland Counties Legal Services, Legal Services of Northern California, and California Rural Legal Assistance to help create a streamlined pro bono clinic service delivery model.</p> <p>Accomplished After holding an initial meeting with all partner organizations, OneJustice began conducting individual meetings with partners to learn more about their programs and processes, and began developing tailored plans. In the first two quarters, planning has focused on creating, testing, and refining technology needs assessments, developing community outreach plans, assessing staffing and analyzing staffing ratios, streamlining clinic administrative processes, and developing training plans and resources. Resource example: They developed a Pro Bono Clinic Roadmap, a customized working document to support partners' remote, hybrid, and in-person pro bono clinics.</p>	<p>\$150,000</p>
<p>Open Door Legal (ODL) is pioneering a legal aid Case Management System. ODL will refine and deploy the CMS, which enables the sharing of client outcomes across service providers. ODL has been working to improve data management and particularly the ability to effectively collect data which can be used when referring cases between organizations. Beta testing partners include the SF Bar's Justice & Diversity Center, the Marin Family & Children's Law Center, and the Cooperative Restraining Order Clinic.</p> <p>Accomplished After conducting 30 interviews, ODL selected a data migration consultant. ODL began with three beta testing partners (Cooperative Restraining Order Clinic, Justice & Diversity Center, and Marin Family & Children's Law Center), and has added a fourth, Mission Economic Development Agency. Beta partners are at different stages of data migration (with one completed) based on their organizational needs and pace. ODL's software developer has been updating features for their CMS product based on beta partner needs, such as a grant reporting tracker, and they are working to implement additional features such as a schedule manager and conflict check.</p>	<p>\$125,000</p>
<p>Peoples College of Law (PCL) will use funds to expand legal clinics year-round, instead of solely during summer months. The year-round legal clinic program will begin with eviction defense and will be designed with flexibility in mind so that PCL can address specific community needs as they emerge over time. PCL plans to bring on a part-time Legal Clinic Coordinator to support the programming.</p> <p>Accomplished PCL was able to fill the part-time Law Clinic Coordinator position within the first quarter, but, unfortunately, that person abruptly quit within a few weeks,</p>	<p>\$26,000</p>

<p>citing family reasons. PCL continues to share the job description through their network and job boards. During the second quarter, PCL held its first clinic, building key elements of the infrastructure that it will leverage in carrying out future clinics. PCL also scheduled a second clinic, for which it is coordinating supervisors and preparing outreach efforts. In partnership with pro-bono attorney/law professors at PCL, they are updating and expanding clinic training materials.</p>	
<p>Public Advocates, Inc. (PA) will use funds to expand their innovative community partnership model to implement equitable educational policies and expanded partnerships with community groups serving low-income communities in the far Northern California region. Through engagement of students and families, these partners will support PA’s provision of legal services, research and policy analysis, education on legal rights and opportunities for advocacy, and communications.</p> <p>Accomplished PA supported their organizing partner, True North, to help secure a \$712,500 California Community Schools Partnership Program Implementation Grant for Loleta Union Elementary School. Support included answering application questions, application review and edits, and participating in strategy conversations related to implementation. PA also provided a Local Control Accountability Plan analysis for two school districts (e.g., analyzing legal requirements and how to minimize staffing reductions), and shared various resources with partners and district leadership, including webinars, funding and training opportunities, and community school assessment examples.</p>	\$50,000
<p>Public Interest Law Project (PILP) will use funds to improve its communication both externally by updating its website, and by purchasing hardware and software necessary to give staff mobile access to the office. Combined, these upgrades will facilitate redefining its online presence while providing a more dynamic infrastructure to support staff. It also will establish itself as a model for others in the legal services arena to follow in their efforts to address an organization's post-pandemic technological needs.</p> <p>Accomplished After consulting with staff and PILP’s IT vendor, and performing industry research on hybrid/remote equipment needs, PILP purchased nearly all of the equipment and accessories included in their proposal (e.g., laptops, monitors, docking stations). Tools like the Box platform allowed them to migrate their network resources to an online environment, in addition to the incorporation of the NEC-based VoIP telephone system. Staff are now able to respond to clients both in the office and remotely, and can quickly connect to the organization's resources regardless of location. After considerable research, PILP decided to build their new website on the Webflow platform.</p>	\$50,000

<p>Public Law Center (PLC) will create a stronger intake system to serve their low-income Orange County client population. PLC will hire 2 Spanish-speaking and 2 Vietnamese-speaking intake staff and train them to perform in-person appointment-based intake, walk-in inquiries, event-based intake, phone and virtual intake, social media inquiries, and text-based communications. This will improve efficiency, connectivity, availability, and issue-spotting abilities of our first line of contact with community members.</p> <p>Accomplished Of the four funded Administrative Assistant and Intake Coordinator positions, PLC hired two Spanish-speaking coordinators and one of the two Vietnamese-speaking coordinators. As of the second quarter, they were in the final stages of hiring the second Vietnamese-speaking coordinator. PLC's intention was to have the four coordinators support all of PLC's services. As they began implementing the program, they determined it would be more efficient to have each coordinator assigned to a main unit, so they would become knowledgeable in that area, and cross-train so they can jump in to support other units as needed.</p>	\$200,000
<p>Root & Rebound (R&R) will use funds to make critical technology updates. Prior to the pandemic, it was using dated desktops and antiquated phone systems to run its statewide reentry hotline. Funds will be used to purchase laptops for staff, improve telephone services technology (essential to serving incarcerated individuals without access to the internet), and update the security and functionality of current case management system.</p> <p>Accomplished R&R vetted three vendors, and after taking into account multiple factors, decided to move forward with Apple. Laptops will be shipped in segments due to the computer chip shortage. 18 laptops were ordered, and plans were made to organize their distribution to staff in an equitable fashion. R&R is undergoing the vetting process for the new Client Relationship Management system, and staff have begun working with consultants to explore functionality requirements. R&R also upgraded their phone system from Nextiva to Zoom, and had a training session for all staff.</p>	\$100,000
<p>San Diego Volunteer Lawyer Program (SDVLP) will undertake an IT infrastructure improvement project to maximize the effectiveness of its case management software, Legal Server. Configuration and implementation of Legal Server's Online Intake and Clinic Modules, with special attention to Spanish language translation and mobile optimization, will facilitate automated data entry and hassle-free coordination between SDVLP's program staff, the attorneys who volunteer to provide pro bono legal services, and clients.</p> <p>Accomplished SDVLP procured an experienced Project Consultant who has been working with the Operations Manager to develop online intake forms. The Consultant</p>	\$30,000

<p>also created several clinic examples to test the functionality of the Clinic Module. The Registrants Module was activated and customized for SDVLP. Additionally, the Consultant is in the process of scouting examples of database governance manuals. Throughout, SDVLP has engaged stakeholders from their core program areas for vetting and input. Five Adobe Acrobat Pro licenses were procured for Legal Administrative Assistants to begin experimenting with digital documents that will eventually be linked to LegalServer.</p>	
<p>San Luis Obispo Legal Assistance Foundation (SLOLAF) will use funds towards the addition of two part-time administrative positions to its small staff. At the time of the LOI submission, SLOLAF had only one administrative position, its Executive Director. SLOLAF has tripled in budget and staff size over the last two years. Increased staff will provide SLOLAF with the capacity to take on new programs to serve needs in this rural area.</p> <p>Accomplished Recruiting for SLOLAF's Finance & Operations Associate position was a bit delayed, however, the position was filled in August. They originally expected to have to hire two people to do the various tasks being covered by this grant, but due to the skill set of the person hired, no separate Communications Coordinator is needed. The Executive Director conducted training for the new employee in September, and she has begun to take various tasks off of the Executive Director's plate, such as payroll, various HR functions, and financial statement preparation.</p>	<p>\$80,000</p>
<p>Senior Citizens Legal Services (SCLS) will use grant funds to strengthen its infrastructure by making vital hardware and software acquisitions and purchasing a financial forecasting/budgeting tool. SCLS' overall capacity increased substantially last year, almost doubling its budget and far exceeding the prior year's service numbers. Since 1972, SCLS has provided high-quality legal services to one of the most vulnerable communities in their area: senior citizens. Yet SCLS continues to operate on a shoe-string budget and with outdated technology. The April 2020 onset of the Covid-19 pandemic showed SCLS how far it was from being able to serve clients remotely, demonstrating the need for improvements.</p> <p>Accomplished SCLS has accomplished several technological improvements including, but not limited to, reinforced network connectivity, upgraded equipment (e.g., router, computers, monitors), improved voice-over IP systems, high speed printers, and ergonomic equipment. SCLS is researching CMS software options, meeting with various CMS providers, and meeting with executive directors and staff from other organizations to learn about their experiences migrating data from PIKA. SCLS also purchased a long-term trial with a forecasting budgeting system called "Fathom" and utilized volunteer support to conduct an analysis and to upload the agency's Quickbooks account.</p>	<p>\$61,000</p>

<p>The TransLatin@ Coalition (TLC) will serve Trans, Gender Nonconforming, and Intersex (TGI) people across California with help with name and gender marker changes. This project will produce Spanish-language name change forms and instructional videos to guide people to complete the forms. The Project will also create a dedicated website for TGI people to have access to the forms and be able to file in the designated courts.</p> <p>Accomplished During the reporting period, TLC was able to provide legal assessments and referrals to legal services to at least 27 Trans, Gender Nonconforming and Intersex (TGI) individuals, including 15 name and gender change applications. Additionally, TLC’s team was able to secure a contract with Hotdocs to start working on the forms that clients will be able to access and fill out via the website. Additionally, TLC is in the process of securing a contract with a company who is going to help produce the video instructions.</p>	\$210,000
<p>Veterans Legal Institute (VLI) has seen a trend in Southern California Veterans who do not understand their legal rights and have not been fully informed on how to receive and use their veterans benefits after their military service has ended. Funding will permit VLI to address this significant gap in information by producing an educational video series catered to veterans which addresses their legal rights and access in immigration, unlawful detainer, veteran’s benefits, discharge upgrades, limited family law, bankruptcy, and estate planning.</p> <p>Accomplished VLI’s executive team worked closely with stakeholders to assign responsibilities for the video series. Video leads were identified, and the approach to each video topic in the series was discussed to ensure the successful delivery of information to the audience. Scripts for each video are underway. The first video of the series was completed and is titled “How to Triage a Family Law Case”. It is an educational video by VLI Lead Staff Attorney Katie Binkley, articulating a step-by-step process that can inform both lay people and attorneys. Further, she describes culturally competent approaches to both legal aid clients and Veterans that are legal aid clients.</p>	\$40,000
<p>Total Grants Awarded</p>	\$4,950,000

IV. Conclusion

We are deeply grateful to the State of California and the Judicial Council for the opportunities these grant funds have created. The need for help from legal aid organizations is so great that available funding generally goes to direct services. While that is appropriate, a consequence can be that the organizations have too little to spend on their own operations. Also, creating new service methods can require spending at the outset that legal aid organizations ordinarily forego. As the reports above show, these grants for purposes other than immediate, direct services will pay big dividends to disadvantaged Californians. We are pleased to report on grant achievements to date, and look forward to an opportunity to report again at the close of these grants.

Attachment 1:

Legal Aid Infrastructure & Innovation Project-Based Groupings

March 25, 2022

*Note: This document was initially created to facilitate grantees' ability to connect with each other to share strategies on similar projects. This document loosely places grantees into groupings, based on their funded projects. (Grantees listed under multiple groupings are designated with an *.)*

Updated Hardware and Enhanced Software Case Management System

- Aids Legal Referral Panel (Salesforce)
- California Indian Legal Services (LegalServer)
- California Rural Legal Assistance (LegalServer)
- Centro Legal de la Raza (Salesforce and accounting system)*
- Central California Legal Services, Inc. (tech infrastructure, intake, LegalServer, pro bono)*
- East Bay Sanctuary (website, mobile texting, elmmigration CMS, training)*
- Legal Aid Foundation of Santa Barbara County (intake, OCM/PIKA CMS, laptops)*
- Los Angeles Center for Law and Justice (LegalServer)
- Open Door Legal (Salesforce – proprietary networked system)*
- Root & Rebound (Salesforce, phone technology, laptops)*

Human Resource, Accounting and Other Systems

- Alameda County Homeless Action Center (phone system, texting)
- California Rural Legal Assistance Foundation (consolidate multiple systems, mobile documentation of violations)
- Centro Legal de la Raza (Salesforce and accounting system)*
- East Bay Community Law Center (HR, payroll, accounting systems)
- Learning Rights Law Center (accounting system)
- Root & Rebound (Salesforce, phone technology, laptops)*
- San Diego Volunteer Lawyer Program (LegalServer intake/clinic modules, translation, pro bono)*
- Senior Citizens Legal Services (hardware/software, budgeting tool)

Website & Online Tools (platform, translation, document assembly, fillable forms, etc.)

- California Advocates for Nursing Home Reform (website upgrade, translation, doc assembly)
- East Bay Sanctuary (website, mobile texting, elmmigration CMS, training)*
- Elder Law & Advocacy (intake, fillable forms, interactive assessments, translations)*
- Family Violence Appellate Project (website, Legal Resource Library)*
- Inland Counties Legal Services (web app, dissolution forms)*
- Legal Aid at Work (web-based employment-law navigator with human-centered design)

Legal Aid Society of San Diego (website)
Public Interest Law Project (website, hardware and software to enable remote access)*

External Database / Portal

Center for Gender and Refugee Studies - California, Inc. (expert witnesses - asylum)
Family Violence Appellate Project (website, Legal Resource Library)*
KIND, Inc. (pro bono portal, serving unaccompanied immigrant children, cell phones)*

Direct Services

California Collaborative for Immigrant Justice (detention centers)
Family & Children's Law Center (Family Law, DV and Special Immigrant Juvenile Status)
KIND, Inc. (pro bono portal, serving unaccompanied immigrant children, cell phones?)*
Leadership Counsel for Justice and Accountability (clinics and community engagement)*
Legal Access Alameda (Disaster Legal Assistance Collaborative)*
Oasis Legal Services (Fresno satellite office, asylum)
Peoples College of Law (year-round eviction defense clinics)
Public Advocates, Inc. (education policy/legal rights)
Public Law Center (restructured approach to intake)*
San Luis Obispo Legal Assistance Foundation (2 part-time admin positions)
The TransLatin@ Coalition (gender marker and name change TA)
Veterans Legal Institute (video series for veterans and advocates)

Communication and Client Outreach

Remote Access & Services

Alameda County Homeless Action Center (phone system, texting)
California Rural Legal Assistance Foundation (consolidate multiple systems, mobile documentation of violations)
Central California Legal Services, Inc. (tech infrastructure, intake, CMS)
East Bay Sanctuary (website and mobile texting, CMS, training)*
Inland Counties Legal Services (web app, dissolution forms)*
Lawyers' Committee for Civil Rights (SF Bay Area) (laptops, printers, licenses, video support)
Leadership Counsel for Justice and Accountability (clinics and community engagement)*
Legal Aid Foundation of Santa Barbara County (intake, OCM/PIKA CMS, laptops)*
Legal Aid of Marin (ipads for remote services)
Neighborhood Legal Services of Los Angeles County (Texting for Outcomes)
Public Interest Law Project (website, hardware and software to enable remote access)*

Intake

Alliance for Children's Rights
Central California Legal Services, Inc. (tech infrastructure, intake, CMS)*
Elder Law & Advocacy (intake, fillable forms, interactive assessments, translations)*
Legal Aid Foundation of Santa Barbara County (intake, CMS, laptops)*
Public Law Center (restructured approach to intake)*
Root & Rebound (Salesforce, phone technology, laptops)*

Pro Bono

Central California Legal Services, Inc. (tech infrastructure, intake, LegalServer, pro bono)*

KIND, Inc. (pro bono portal, serving unaccompanied immigrant children, cell phones?)*

OneJustice (pro bono service delivery model)*

San Diego Volunteer Lawyer Program (LegalServer intake/clinic modules, translation, pro bono)*

Veterans Legal Institute (video series for veterans and advocates)

Staff Retention: Leadership Development, Diversity Equity and Inclusion

Coalition to Abolish Slavery and Trafficking (Legal Fellow)

Disability Rights Education and Defense Fund (DEI leadership development)

Inner City Law Center (right to counsel training program, housing advocate pathways)

Legal Aid Society of San Mateo County (leadership, staff PD, recruiting/retention)

Legal Aid Statewide Capacity

Harriett Buhai Center for Family Law (expanding legal aid capacity to achieve pension benefits in dissolution)

Inner City Law Center (right to counsel training program, housing advocate pathways)

Legal Access Alameda (Disaster Legal Assistance Collaborative)*

Neighborhood Legal Services of Los Angeles County (Texting for Outcomes)

OneJustice (pro bono service delivery model)*

Open Door Legal (Salesforce - networked system)*

Contra Costa Senior Legal Services (needs assessment for seniors)

**Indicates grantee appears in multiple groups.*