# I. SUPPORT CENTER Applicant Profile

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| --- | --- |
| **1.** | Organization Name:       |
| aka/dba:       |
| **2.** | Street Address:      | Mailing Address:      |
| **3.** | Telephone: (   )    -     | **4**. | Website:       |
| Fax: (   )    -     |
| **5.** | Branch Offices:       | **6**. | County(ies) Served:  STATEWIDE |
| **7.** | Staff Director:       | **Signature:** | **X** |
| Title:       | Direct Telephone Number: (   )    -     Ext.       |
| Email Address:       |
| **8.** | Second Contact Person:       | Direct Telephone Number: (   )    -     Ext.       |
| Contact Person’s Title:       | Email Address:       |
| **9.** | Fiscal Contact Person:       | Direct Telephone Number: (   )    -     Ext.       |
| Fiscal Contact’s Title:       | Email Address:       |
| **10.** | Board Chair or Alternate Board Officer: Name:      | **Signature:** | **X** |
| Title:       | Direct Telephone Number: (   )    -     Ext.       |
| Business Address:      | Email Address:       |
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# II. DESCRIPTION OF ORGANIZATION

**Applicant Name:**

* Describe your organization and **all** of its program services. Provide details about your area(s) of substantive or procedural expertise, your service priorities and the mechanism(s) used to deliver services.

* Describe your functional legal support activities (consultation, advocacy support, information services, training).

* Also include information about legal support services provided to organizations or entities that are not qualified legal services projects, and describe any non-support activities.

# III. Eligibility Criteria for Support Centers

**Applicant Name:**

**1.** Did your center, 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?

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| [ ]  | Yes. |
| [ ]  | No. (Support centers that were not in operation prior to December 31, 1980 must meet the provisions of Eligibility Guideline 2.9.1 every third year. |
| [ ]  | Applicant is subject to the deeming process this year. Attached is a one-page description of the program for distribution to qualified legal services projects with deeming ballots. |

1. Your center must provide at least two of these types of services. Check those that apply.

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  | Technical Assistance | [ ]  | Advocacy Support |
| [ ]  | Information Services | [ ]  | Training |

# IV. Certifications for Support Centers

**Applicant Name:**

**The applicant center hereby certifies the following:**

1. It is a corporation or part of a corporation. (See Checklist Instructions regarding submission of a copy of the corporation’s Articles of Incorporation certified by the California Secretary of State or similar officer of another state, and a Certificate of Status dated July 1, 2011 or later from the California Secretary of State or similar officer of another state.)
2. It is a nonprofit organization. (See Checklist Instructions regarding submission of a copy of your determination letter from the Internal Revenue Service granting your application for exemption from the appropriate provisions of subchapter (f) of Chapter 1 of the Internal Revenue Code of 1954, as amended, and a copy of your determination letter from the State Franchise Tax Board granting your application for exemption from the appropriate section of the California Revenue and Taxation Code.)

It currently provides, through an office in California on a statewide basis, a significant level of legal training, legal technical assistance, or advocacy support to legal services projects which qualify for Trust Fund allocations. (Complete Form XI and include a list of the qualified legal services projects to which your program provided assistance. Describe the services provided, following the instructions for Form XI.)

It provides services without charge to or on behalf of qualified legal services projects. **(Enclose criteria for eligibility.)**

It provides legal training, legal technical assistance or advocacy support without charge as its primary purpose and function. Enclose a financial statement for the preceding fiscal year that has been audited or reviewed by an independent certified public accountant. If gross expenditures exceed $500,000, the financial statement must be audited.

Under the penalty of perjury, we, the undersigned, state that the information provided in response to the above statements is true and correct to the best of our knowledge.

 Signature of Staff Director

 Signature of Board Chair (or Alternate Board Officer and Title)

# V. Assurances for Support Centers

**Applicant Name:**

**The applicant center assures compliance with the following:**

1. The applicant center will use funds allocated by the Trust Fund Program only for the purposes set forth in Business and Professions Code §§6210-6228, and the corresponding State Bar rules and any additional amendments thereto.
2. The applicant center will expend all funds allocated from the Trust Fund Program in support of qualified legal services projects. The applicant center agrees to restrict its use of funds allocated from the Trust Fund Program to matters directly related to the needs of indigent clients in California.
3. The center assures that the services funded by the Trust Fund Program are in addition to those already funded for qualified legal services projects by other sources.
4. The applicant center will use court-awarded attorneys’ fees from cases funded through the Trust Fund Program to provide legal training, legal technical assistance or advocacy support without charge to qualified legal service projects on a statewide basis in California.
5. The applicant center’s board of directors must by resolution establish the center’s priorities for the provision of legal services. The resolution must be made pursuant to consultation with legal services attorneys, members of the private bar and eligible clients. **(Enclose a copy of the resolution dated January 1, 2013 or later, a description of the priority setting process, and a list of the persons or entities consulted in setting the priorities.)**
6. The applicant center will:
7. at all times honor the attorney-client privilege and will uphold the integrity of the adversary process;
8. not impose restrictions unrelated to statutes and rules of professional conduct on attorneys who provide representation to indigent clients with funds provided in whole or in part from the Trust Fund Program;
9. not discriminate on the basis of race, color, national origin, religion, sex, disability or age.
10. The center will comply with quality control review procedures adopted by the State Bar.
11. The center will comply with fiscal management and control procedures adopted by the State Bar (Standards for Financial Management Systems and Audits).
12. The center will permit site visits and present information deemed reasonably necessary to determine compliance with the laws and rules governing the Legal Services Trust Fund Program.
	1. If your program is part of a corporation and some or all of your program’s income is derived from general unrestricted funds of the corporation, you must enclose an assurance from the corporation’s chief executive officer stating that the corporation’s contribution to your program will not be reduced from the previous fiscal year level. The Commission may grant an exception to this requirement because of impracticality, as where the corporation suffers a diminishment of its unrestricted funds and is therefore required to reduce its funding to all of its programs.

Signature of Staff Director

Signature of Board Chair (or Alternate Board Officer and Title)

# VI. Quality Control Review for Support Centers

**Applicant Name:**

**Check, if applicable.**

|  |  |  |
| --- | --- | --- |
| [ ]  | **1.** | Applicant has received a written quality control review from a non-Trust Fund Program funding source or entity issued since January 1 of the previous calendar year. (Enclose a copy of the most recent report.) |

**All programs must complete 2:**

1. Identify supervisory personnel and describe the method(s) by which all legal staff is supervised. Explain how management ensures that the staff is providing quality legal training, legal technical assistance and advocacy support. If there is only one staff attorney or the program only employs contract attorneys, explain how the attorney position(s) is supervised.