

PROPOSED IOLTA BUDGET - FORM A
Qualified Support Centers
2013-2014 Grant Year

Program Name: _____

Staff Director: _____
Type Name Signature

Contact Person: _____
Type Name Phone Number and Extension

_____ Title Email Address

1. Enter the amount of your grant allocation: \$

2. Business & Professions Code §6218(b) states: "Funds received pursuant to this article by support centers shall only be used to provide services to qualified legal services projects..." Support Center Guideline 1.2.1 states that "... all funds allocated from the Trust Fund Program will be used in support of qualified legal services projects providing free legal services in California."
 Describe the legal support services and activities that will be funded with this grant.

3. Explain how your IOLTA grant fits into your overall budget planning. For example, is your IOLTA grant considered core funding that is allocated for both personnel and non-personnel expenses; are funds earmarked for specific positions or projects or to cover administrative expenses; are IOLTA funds used to leverage or provide a match for other grants, etc.?

PROPOSED IOLTA BUDGET - FORM B
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“The Standards for the Provision of Civil Legal Aid,” adopted by the American Bar Association House of Delegates in August 2006, are the guidelines used by the State Bar in reviewing and approving the quality control procedures and evaluating the practices of applicant and recipient programs.

Standard 2.3 states, “A provider should participate in regional and statewide delivery systems to improve the systems’ capacity to deliver a full range of services that address the interests of low-income communities.”

The commentary to Standard 2.3 states, “... Each provider should actively work in concert with pertinent organizations in the system to be better able to meet the needs of low income persons with civil legal problems and to provide relatively uniform access for all persons who seek legal assistance.”

1. Describe a project or activity that your organization has been working on in coordination with other support centers and/or provider(s) of legal services for low-income people.
 - a. How long have you been working on the collaborative effort?
 - b. Identify the participants and summarize your achievements.
 - c. Have you evaluated the success of the collaborative effort?
 - d. If yes, what were the outcomes of your evaluation process?
 - e. Have any changes been instituted as the result of the evaluation outcomes?

2. Describe your organization’s plans to participate in additional collaborative efforts, with special regard to outreach, policy and strategic planning.

PROPOSED IOLTA BUDGET - FORM C
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You must submit a plan to ensure that services funded with the Trust Fund grant are in addition to those already funded by other sources (Business & Professions Code § 6216(c) and Eligibility Guideline 2.4).

1. Do you receive funding from sources other than the Trust Fund Program to provide legal support services to qualified legal services projects in California? Yes No
 - a. If *yes*, how much income do you expect to receive from sources other than the Trust Fund Program for the period 7/1/2013 – 6/30/2014? \$
 - b. If *no*, describe your organization's efforts to identify and secure other sources of funding. Examples might include submission of applications for funding, identification of new funding sources, pursuit of *cy pres* opportunities, etc.

2. Explain how you will ensure that IOLTA funds are used only for services that are not supported by other sources [Business & Professions Code §§6216(c) and 6223].

PROPOSED IOLTA BUDGET - FORM D
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1. If your organization provides services other than free legal support services to qualified legal services projects in California, describe those other services. Explain how you will ensure that your Trust Fund grant is not spent to support those activities.

2. Trust Fund grant expenses must be strictly segregated from other expenses in your internal accounting system. Describe the systems you will use to account separately for the use of Trust Fund money [Business & Professions Code §§6216 and 6223].

PROPOSED IOLTA BUDGET - FORM F
Qualified Support Centers
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Program Name: _____

1. Explain how you arrived at the amounts on each line of Form E. Explanations for all allocations should indicate whether the grant is being used to pay for specific items or is being allocated to line items on a percentage or formula basis.
 - ❑ The explanation for each personnel allocation must specifically identify the total number of positions and the full-time equivalents to be funded with this grant. For example, if your budget for lawyers for program services represents funding for two half-time attorneys, the budget narrative might state: "Salary for one FTE attorney, including a half-time attorney to handle training and a half-time attorney for resource development." Do not state: "Two part-time attorneys." If your personnel allocations are an across-the-board share of all personnel costs, identify the number of positions to be funded in each category and the full-time equivalent for each category. For example, 10 percent of the salary of 12 full-time attorneys is equivalent to 1.2 full-time positions.
 - ❑ Explanations for non-personnel allocations should indicate whether the grant is being used to pay for specific items or is being allocated to line items on a percentage or formula basis. If you propose to allocate this grant for an across-the-board percentage of non-personnel expenses, state the basis for the percentage. **Remember to itemize individual costs included on lines 23-25. Identify proposed contractors, the general nature of duties to be performed, and rate(s) of compensation.**

2. If you budget less than 75% of your grant for personnel expenses, or less than 75% of your grant for program costs, explain why (a) the proposed budget deviates from recommended percentages, and (b) the Commission should approve an exception in your case.