

## REQUEST FOR PROPOSALS

### STATE BAR OF CALIFORNIA MODEST MEANS/INCUBATOR PROJECT

The State Bar of California invites legal services programs, bar associations, law schools, lawyer referral services, and other qualifying organizations to apply for a State Bar of California Modest Means/Incubator Project grant.

**Deadline to Apply: December 1, 2014.**

#### I. Project Description/Background

The California Commission on Access to Justice is working with the State Bar to promote the creation and/or expansion of modest means incubator programs. Modest means incubator programs are programs that accomplish two primary goals: 1) expand legal services for low and moderate income people, and 2) assist California lawyers in establishing sustainable law practices that primarily serve low and moderate income people. The State Bar of California has received funding from the Ford Foundation, the Public Welfare Foundation, and the California Bar Foundation to provide seed grants to organizations and/or collaborative efforts to expand or establish such programs.

#### II. Award Information

Approximately three to five grants of \$20,000 to \$50,000 will be awarded. The exact dollar amounts will vary depending on the number and quality of applications received. These one-time, non-renewable grants will be distributed in early 2015, and expert support will be provided for one year. Support will include available technical assistance from the State Bar in project creation, implementation, and evaluation.

#### III. Guidelines

##### A. Eligibility

Eligibility is restricted to not for profit entities in California that will provide legal services to people of low and moderate means.

##### B. *Types of Programs That Will Be Funded*

Funding will be awarded to new initiatives and existing programs that promote access to justice by increasing the number of low and moderate income people served while preparing lawyers to create sustainable law practices that provide affordable legal services.

Programs should include collaborative efforts between entities that train lawyers and organizations that serve clients, such as lawyer referral services, law schools, MCLE providers, bar associations, legal services offices and/or other similar organizations.

Projects will be evaluated based upon the following criteria:

- Scalability Pilot programs should be scalable, so that an increasing number of traditionally underserved clients can be assisted, and so that an increasing number of attorneys are prepared to establish moderate means practices.
- Sustainability While these are one-time grants, they are intended to seed initiation of new, continuing programs, or the expansion of existing programs.
- Strong training and mentorship for participating lawyers Lawyers in the programs should serve clients well, and be prepared for future successful independent practice through intensive training and support.
- Strong collaboration and innovative partnerships Programs should have the networks and ability to recruit, train, mentor, and refer cases to participating attorneys. Bar associations, law schools, lawyer referral services and legal aid organizations each excel in different aspects of those requirements.
- Quality of services Clients should be well-served by trained and supported attorneys, regardless of the clients' income.
- Number of clients to be served Programs should be created to serve more clients than are currently being served in a given geographical or legal subject area. Proposed programs must not replace existing clinical or legal services programs, but should expand the number of individuals served.
- Number of new lawyers to be trained Programs should train enough attorneys to serve the target clientele, such that a quantitative and qualitative impact in the area can be noted. Each of the attorneys trained should be provided adequate training and ongoing support, so that they can serve clients well and be launched into practice.
- Geographic diversity Preference will be given to programs that expand service into underserved geographic areas, particularly rural and remote parts of California.
- Issue focus Programs may choose to focus on one or a small number of substantive issue areas (for example, family law, housing law, immigration, guardianship, conservatorship, or other areas) in order to have greater impact.

- Evaluation plans Programs should have stated measurable goals, plans for measuring each of the bullets above, and plans to collect and use data that is gathered with regards to those goals. In addition to local evaluation, funded programs will be expected to work with a statewide evaluator supported by the State Bar in order to facilitate data gathering, technical assistance, and dissemination of lessons learned and best practices.

## GRANT APPLICATION INSTRUCTIONS

Please prepare your grant proposal using the following format. Please also:

- Email the proposal to Theresa.Mesa@calbar.ca.gov
- 15 page maximum
- Include: page numbers, single spaced, 12 point font, minimum one inch margins
- All narrative documents or attachments in Word and Excel formats, not PDF format
- Questions: Contact Theresa Mesa theresa.mesa@calbar.ca.gov or 415-538-2143

### 1. COVER SHEET

**APPLICANT:** Legal name of the organization(s) requesting grant funds.  
If applicable, list fiscal sponsor.

**CONTACT INFORMATION:**

- Name of the Executive Director and key staff responsible for the project (please note that we may contact you with additional questions)
- Phone and e-mail for each key staff person
- Name of Chair of Board of Directors
- Mailing address
- Organization's website address

**PROPOSAL TITLE:** The name of the project.

**ORGANIZATIONAL BUDGET:**

Amount of your total organizational budget for the current fiscal year.

**PROJECT BUDGET:** Amount of your project budget.

**GRANT REQUEST:** Amount of your request.

### 2. PROPOSAL NARRATIVE:

**ORGANIZATIONAL BACKGROUND SUMMARY:**

Please briefly summarize the history and background of the organization(s) (1-2 paragraphs).

**ORGANIZATIONAL CAPACITY:**

Brief explanation of the organization's ability to carry out the program, including any experience implementing similar programs.

**PROPOSAL SUMMARY:**

Please provide a 1-2 paragraph summary of the proposed program or project.

**STATEMENT OF NEED:**

Discussion of the need, problem and/or opportunity the organization seeks to address.

**PROPOSED OBJECTIVES:**

Please list and describe the major objectives and strategies for the project or program. Briefly also describe what challenges you anticipate encountering.

**CLIENTELE TO BE SERVED AND FEES CHARGED:**

Please describe the clientele to be served by the project or program, including any income qualifications or income caps.

This RFP has no requirement with respect to fee structure(s). If fees are to be charged to clients for any program or project activities, please describe any such fees. Include the amounts charged and a description of how the fees will be used or distributed.

**PROPOSED ACTIVITIES:**

Please provide a list of specific proposed activities to be completed during the grant period, the objectives of each of the activities, and the steps planned to reach those objectives.

**OUTCOMES:**

Please list major expected outcomes. Please quantify the outcomes whenever possible.

**EVALUATION:**

Plans for evaluating or monitoring the effectiveness of your work and progress toward achieving goals and objectives. Grant recipients will be required to track and report certain project activities and participate in a standardized evaluation process to capture project results and identify promising practices.

**SUSTAINABILITY:** Plans for continuing and growing the project beyond the time period of the grant.

**CONTEXT:** Anything else the State Bar should know about your organization's programs or current challenges, or the policy climate in which you are working.

**3. ATTACHMENTS:**

**ORGANIZATIONAL BUDGET:**

Organizational budget for your current fiscal year.

**PROJECT BUDGET:** Proposed project budget.

**OTHER SOURCES OF FUNDING:**

Please describe other sources of funding that have been committed or that have been requested for the project.

**BOARD LIST:**

List of Officers and Directors for the applicant organization(s). If applicable, please include board list for fiscal sponsor.

**STAFF LIST:**

Staff list for the organization or list of key staff responsible for the proposed project.

**BIOS:**

Bios for key personnel (1 paragraph max. each). Please do not include full resumes.

**IRS LETTER:**

Copy of the most recent IRS letter or letters regarding not for profit status, if applicable.

**FISCAL SPONSORSHIP AGREEMENT:**

If applicable, written agreement from fiscal sponsor describing relationship between fiscal sponsor and project.

**ADDITIONAL INFORMATION:**

Please attach any information describing your organization that will help us better understand your work and strategies. (i.e. brochures, annual reports, etc.).