



THE STATE BAR OF CALIFORNIA

LEGAL SERVICES TRUST FUND PROGRAM

180 HOWARD STREET, SAN FRANCISCO, CALIFORNIA 94105-1639

TELEPHONE: (415) 538-2252; FAX: (415) 538-2529

Stephanie L. Choy
Managing Director
(415) 538-2249

Lorna Choy
Sr. Grants Administrator
(415) 538-2535

Denise Teraoka
Grants Administrator
(415) 538-2545

Daniel Passamaneck
Grants Administrator
(415) 538-2403

Robert G. Lee
Sr. Accountant
(415) 538-2009

DATE: April 29, 2010
TO: Support Centers Eligible for Funding
FROM: Stephanie Choy, Managing Director
Legal Services Trust Fund Program
SUBJECT: Notice of Eligibility for Grant Year July 1, 2010 – June 30, 2011

On behalf of the Legal Services Trust Fund Program, I am pleased to advise you that the Trust Fund Commission has found your organization eligible for funding as a "qualified support center" in the 2010-2011 grant year. If our records indicate that there are outstanding documents required to complete your application, they are listed on the enclosed schedule and the Commission's determination of eligibility is subject to receipt of those documents by May 5, 2010.

The total amount available for 2010-11 IOLTA grants will be \$11,873,143, a 15% decrease from 2009-2010. The tentative amount of your 2010-11 grant is **\$80,953**. This projected amount is based on 22 support centers receiving grant allocations this year.

The next step in the application process is for you to prepare and submit a proposed budget for the use of your 2010-11 grant. In light of the considerable funding challenges that you all continue to battle, the Commission approved a recommendation to allow programs to set aside 2010-11 grant funds for 2011-2012 operations. You can designate up to 50% of your 2010-11 grant award as funds to be held in reserve for 2011-12 operations. If you plan to hold a portion of your grant in reserve, include the amount on line 26 of Form E. All 2010-11 IOLTA grant funds, including funds held in reserve, must be fully expended by December 31, 2011.

NOTE: The Trust Fund Commission had taken action to allow programs to set aside up to the maximum of 50% of their 2009-10 grant as reserved funds for use in the carry-over period ending December 31, 2010. This budget material will be sent to you under separate cover.

The 2010-11 budget forms will be posted at www.calbar.ca.gov/ioltaapplicationmaterials no later than May 5. **Please use the 2010-2011 forms only.** Budgets completed on old forms will be returned to you for revision and resubmission.

Completed budgets must be received in the Trust Fund office by **Friday, May 28**. You should (1) submit two hard copies with original signatures, **and** (2) e-mail both the Word and Excel documents to trustfundprogram@calbar.ca.gov.

Please feel free to call for assistance on any aspect of the proposed budget or the remainder of the grant application process.

Enclosures

Grant Year : 10/11
Grant Fund : IOLTA Fund
Allocation#: 180

Elg Dec	Pgm#	Name	County	Qualified Expenditures	-----Allocations-----		
					Basic	Pro Bono	Total
EP	20	COALITION OF CALIF. WELFARE RIGHTS ORGS.	Statewide	N/A	80,953	0	80,953
			*Total		80,953		80,953



THE STATE BAR OF CALIFORNIA

LEGAL SERVICES TRUST FUND PROGRAM

180 HOWARD STREET, SAN FRANCISCO, CALIFORNIA 94105-1639

TELEPHONE: (415) 538-2252 FAX: (415) 538-2529

Stephanie L. Choy
Managing Director
(415) 538-2249

Lorna Choy
Sr. Grants Administrator
(415) 538-2535

Denise Teraoka
Grants Administrator
(415) 538-2545

Daniel Passamaneck
Grants Administrator
(415) 538-2403

Robert G. Lee
Sr. Accountant
(415) 538-2009

DATE: April 29, 2010
TO: Program Directors
FROM: Lorna Choy, Senior Grants Administrator
Legal Services Trust Fund Program
SUBJECT: IOLTA Carry-over Budget and Budget Revision

The 2009-10 IOLTA grant year comes to a close on June 30. This year, in light of the funding challenges, programs will be allowed to carry over a maximum of 50% of the 2009-10 grant allocation into the next grant year.

Any program that expects to have unspent funds as of June 30 (including funds previously budgeted as reserves) must submit a budget and budget narrative for use of the carry-over amount. Prepare your budget based on a carry-over period of July 1 through December 31, 2010. All funds unspent as of December 31 must be returned to the State Bar of California.

Carry-over budget form(s) and supporting written narrative must be submitted to the Trust Fund Program no later than **Friday, May 21**. Please complete a separate form for each county where a carry-over is projected. Programs that have carry-over funds in more than one county must also prepare an additional form that consolidates carry-over amounts from all counties.

When preparing the carry-over form(s), show your current approved budget in column 1 and your expected expenses through June 30 in column 2. Subtract the amount on line 26 in column 2 from the amount on line 26 in column 1. The balance between those two columns represents the amount that must be budgeted in column 3. (You may allocate carry-over funds to line items that were not included in the original approved budget.)

Column 4 includes the **total of columns 2 and 3**. Calculate the change between column 1 and column 4 to determine whether there is a material deviation from your approved budget (see Article VII of the General Grant Provisions, copy attached). In the event of a material deviation, you must submit an additional narrative to explain the proposed revision to the approved budget. **Reminder:** Budget revisions are requested here but they should also be submitted during the grant year **as soon as a material deviation is projected**.

ARTICLE VII

PROGRAM CHANGES AND BUDGET REVISIONS

7.01 BUDGET REVISIONS. Recipients shall not materially deviate from the Approved Budget without first obtaining the prior written consent of the Director. A material deviation will be deemed to have occurred in the event of anticipated or actual expenditures of Grant Funds which are materially greater or less than as set forth in the Approved Budget, whether in total or by individual line item, or which materially alter the ratio of Program to Administrative Costs or which involve a disposition of property acquired with Grant Funds. Budget amount increases or decreases will be deemed material when they meet either of the following tests:

1. The individual deviation is in excess of \$1,000 and exceeds the lesser of \$10,000 or 10% of the Recipient's Grant for that Grant period; or
2. The accumulated total of all budget deviations since the beginning of the Grant Period exceeds the lesser of \$10,000 or 10% of the Recipient's Grant for that Grant Period.

In the event of a material budget deviation, the Recipient shall request a revision of its Approved Budget. Such request shall be in a writing submitted to the Director fully delineating the request, the reasons for it, why it is necessary and its effect on the Recipient. The Director may request such additional information that he or she may deem necessary. If the Director determines that use of funds is consistent with the Legal Services Trust Fund Program, he or she will approve the request and the Approved Budget will be deemed amended accordingly.

Recipients shall report all increases or decreases in the approved budget as part of the quarterly financial report submitted pursuant to grant provision 5.01. This information must be submitted whether or not the increase or decrease was a material deviation for which prior consent was required.

**LEGAL SERVICES TRUST FUND PROGRAM
PROPOSED CARRY-OVER BUDGET**

Grant Year: _____ FUND: IOLTA

1. Program Name: _____
2. Budget Prepared By: _____ Telephone #: _____
- E-mail: _____
3. County: _____ Allocation: _____

ACCOUNT TITLE	(1)	(2)	(3)		(4)
	CURRENT APPROVED BUDGET (TOTAL)	PROJECTED EXPENDI- TURES THROUGH JUNE 30	PROPOSED CARRY- OVER BUDGET (UNSPENT FUNDS ONLY)		REVISED BUDGET TOTAL* (Col. 2+3)
			PROGRAM	ADMIN.	
PERSONNEL					
4. Lawyers					0
5. Paralegals					0
6. Other Staff					0
7. SUBTOTAL	0		0	0	0
8. Employee Benefits					0
9. TOTAL PERSONNEL	0		0	0	0
NON-PERSONNEL					
10. Space					0
11. Equipment Rent/Maint.					0
12. Supplies/Printing/Postage					0
13. Telecommunications					0
14. Program Travel					0
15. Training					0
16. Library					0
17. Insurance					0
18. Audit					0
19. Litigation					0
20. Capital Additions					0
21. Contract Services/Clients					0
22. Contract Services/Program					0
23. Other					0
24. TOTAL NON-PERSONNEL	0	0	0	0	0
25. RESERVED FUNDS					0
26. GRAND TOTAL	0	0	0	0	0

27. Budget reviewed by: _____
(Program Director's signature)

*Budget Narrative required if column 4 is materially different from column 1, refer to Article IV of General Grant Provisions.

LEGAL SERVICES TRUST FUND PROGRAM BUDGET REVISION

Grant Year: _____ Fund: _____

1. Program Name: _____
2. Budget Prepared By: _____ Telephone #: _____
- E-mail: _____
3. County: _____ Allocation: _____

ACCOUNT TITLE	CURRENT APPROVED BUDGET (TOTAL)	REVISED PROPOSED BUDGET		
		PROGRAM	ADMIN.	TOTAL
PERSONNEL				
4. Lawyers				0
5. Paralegals				0
6. Other Staff				0
7. SUBTOTAL	0		0	0
8. Employee Benefits				0
9. TOTAL PERSONNEL	0	0	0	0
NON-PERSONNEL				
10. Space				0
11. Equipment Rental & Maintenance				0
12. Supplies, Printing & Postage				0
13. Telecommunications				0
14. Program Travel				0
15. Training				0
16. Library				0
17. Insurance				0
18. Audit				0
19. Litigation				0
20. Capital Additions				0
21. Contract Service/Clients				0
22. Contract Service/Organization				0
23. Other				0
24. TOTAL NON-PERSONNEL	0	0	0	0
25. RESERVED FUNDS				0
26. GRAND TOTAL	0	0	0	0

27. % Personnel: _____ + % Non-Personnel: _____ = 100%

28. % Program: _____ + % Administration: _____ = 100%

29. Approved: _____
(Program Director's signature)

***Budget Narrative Required. Explain any proposed line item reallocations.**