

2025 Rules Committee Work Plan

	Topic	Present Recommendation to Rules Committee	Status (Next Action in Bold)	Staff	Commissioners
1	Audits & in-kind donated services		COMPLETED → Implemented	Doan	
2	Define civil legal services		COMPLETED → Implemented	Chris	
3	Define indigency		COMPLETED → Implemented	Erica	
4	Primary purpose for QLSPs		COMPLETED → Implemented (only technical change)	Christal	
5	Accountability for late submissions		COMPLETED → Implemented	Danielle	
6	Client complaint process		COMPLETED → Implemented	Erica	
7	Expungements, infractions, and other non-civil areas of law		COMPLETED → Implemented		
8	RFP review process for discretionary grants	3/29/2023	COMPLETED → Implemented	Christal	Jim; Amin
9	Fee generating work and contingency fee arrangements	4/27/2023	COMPLETED → Implemented	Brady; Raul	N/A
10	IOLTA reserve policy	6/21/2023	COMPLETED → Implemented	Erica; Michael; Heidi	Catherine; Salena; Tammy
11	Law school clinical programs	6/21/2023	COMPLETED → Implemented	Jennifer	Will; Jim
12	Citing new ABA model rules for monitoring visits	N/A	COMPLETED → Implemented	Erica and Brady	
13	Fiscal issues: (1) State Bar grant expenditure deductions	11/1/2023	LSTFC approved 11/09/2023; completed	Christal; Michael; Heidi	Jason; Erica; and Patience

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			partial public comment; pending further edits; to LSTFC 2/28/2025 ; public comment 45 days to LSTFC TBD 2025; to BOT TBD 2025		
14	Fiscal issues: (1) Unspent and relinquished grant funds; (2) Audited Financial Statement/Financial Review Findings; (3) Grant Award Reductions or Grant Terminations	8/2/2023; 11/01/2023	Hold for packaging; to LSTFC 2/28/2025 ; public comment 45 days; to LSTFC TBD 2025; to BOT TBD 2025	Christal; Michael; Heidi	Jason; Erica; and Patience
15	Pro bono allocation	11/01/2023	COMPLETED → Implemented	Angela	Louise; Amin; Jason
16	Carryovers and budget modifications	11/01/2023	Hold for packaging; to LSTFC 2/28/2025 ; public comment 45 days; to LSTFC TBD 2025; to BOT TBD 2025	Danielle	Jim; Patience; Erica
17	Fiscal issues: Expenditure deductions (pass through/exchange funds, out of county expenditures)	3/20/2024	Hold for packaging; to LSTFC 2/28/2025 ; public comment 45 days; to LSTFC TBD 2025; to BOT TBD 2025	Heidi and Christal	Erica, Jonathan, and Jason
18	Fiscal issues: Expenditure deductions (non-qualifying activities)	5/07/2024	Hold for packaging; to LSTFC 2/28/2025 ; public comment 45 days; to LSTFC TBD 2025; to BOT TBD 2025	Heidi and Christal	Erica, Jonathan, and Jason

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19	Program Quality and Internal Controls	11/06/2024	In process; to LSTFC 2/28/2025 ; public comment 45 days; to LSTFC 5/21/2025; to BOT 9/18/25	Jennifer	Erica, Jacqueline, and Diana (non-Rules committee member)
20	Fiscal issues: Define fiscal standards and internal control requirements	11/06/2024	In process; to LSTFC 2/28/2025 ; public comment 45 days; to LSTFC 5/21/2025; to BOT 9/18/2025	Heidi and Christal	Erica, Jonathan, and Jason
21	Purchase of real property and tangible property; capital additions; treatment of mortgage payments; procurement policy; compliance with federal grant requirements	3/7/2025	Pending; to Rules Committee 3/7/2025 ; to LSTFC 5/21/25; public comment 45 days	OGC + Heidi, to delegate as appropriate	N/A
22	Support Centers Part 1: Deeming; outreach and statewide support; office space; defining “significant support services” and other Support Center issues: Primary Purpose, national work benefiting California	5/2/2025	In process; to Rules Committee 5/2/2025 for preview/initial discussion ; return to Rules Committee for vote on 8/22/25; to LSTFC 11/7/2025; public comment 45 days; to LSTFC TBD 2026; to BOT TBD 2026	Kim T. and Erica + Heidi	Catherine, Amin, and Toni
23	Fiscal issues: Defining monitoring; Define monitoring outcomes; separate monitoring	5/2/2025	Pending; to Rules Committee 5/2/2025 ; to LSTFC 5/21/2025; public comment 45 days; to	Mara + fiscal	Erica, Tammy, and Jonathan

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	processes for discretionary grants		LSTFC 8/8/2025; to BOT 9/18/2025		
24	Increase to 300% FPL	5/2/2025	Pending; to Rules Committee 5/2/2025 for preview/discussion	TBD	Xavier, Toni, Catherine
25	Support Centers Part 2: Deeming; outreach and statewide support; office space; defining “significant support services” and other Support Center issues: Primary Purpose, national work benefiting California	8/22/25	In process; to Rules Committee 5/2/2025 for preview/initial discussion ; back to Rules Committee for vote on 8/22/25; to LSTFC 11/7/2025; public comment 45 days; to LSTFC TBD 2026; to BOT TBD 2026	Kim T. and Erica + Heidi for fiscal	Catherine, Amin and Toni
26	ECR rates and Leadership Bank Program	8/22/2025	Pending; to Rules Committee 8/22/2025	Fiscal	N/A
27	Investment Policy	8/22/2025	Pending; to Rules Committee 8/22/2025	Sylvia + fiscal	Erica and Xavier
28	Fiscal issues: Clarify requirements for indirect costs (define admin and program, move to direct/indirect); review reporting related to statutory spending requirements	10/29/2025	Pending; to Rules Committee 10/29/2025	Angela + fiscal	Erica, Tammy, and Jonathan
29	Requests for Reconsideration	2026	Pending	TBD	TBD

* Revised 2/5/2025

Committee Members:

- Catherine Blakemore (Chair)
- Amin Al-Sarraf
- Erica Connolly
- Toni Hoang
- Tammy Mahoney
- Jonathan Sandville
- Xavier Vargas