



MEMORANDUM

TO: Interested Eligible Civil Legal Aid Providers –**CURRENT GRANTEES ONLY**

FROM: Lisa Melton, Interim Director of Grants

SUBJECT: Announcement of Funding Opportunities for Civil Legal Aid for Low-Income Persons in Texas; Application is **due on August 7, 2025, by 5 PM Central Time**

DATE: July 16, 2025

The Texas Access to Justice Foundation (TAJF) is pleased to announce open of Funding Opportunities for grants to provide free basic civil legal services to eligible low-income people in Texas.

Read carefully all the attachments BEFORE registering in [TAJF WebGrants](#) and starting an application. Review all grant and audit requirements, grant criteria and all approved uses of each funding stream. Each grant program is uniquely tailored but all have in common the legal services case work authorized to be performed with TAJF funds. For 2025 grant opportunities, the TAJF Board has prioritized services¹ in the following areas:

- **Housing:** Supporting safe and secure housing
- **Children & Families:** Supporting safe, stable environments for children, youth, and families
- **Health, Safety & Access:** Supporting access to safety, care, and stability
- **Financial:** Supporting stability and financial independence

TAJF funds nonprofit organizations in Texas that provide free civil legal services. TAJF does not fund legal assistance in criminal matters; lobbying, class action lawsuits, lawsuits against government entities unless for securing individual benefits, and some TAJF grant programs prohibit any funding for litigation for actual or punitive damages. With a narrow exception, TAJF does not fund fee generating cases.

Grant Application Due Date: Applications must be **submitted** online through the [TAJF WebGrants](#) system **by 5 PM Central on August 7, 2025**. There is no guarantee that funds will be available or that applicants will receive funding.

Grant Time Period: Funding decisions will be made by October 1, 2025, with a grant start date retroactive September 1, 2025, for CURRENT grantees. The grant funded period varies by funding source.² If you have questions, contact the program officer according to the list below:

- Basic Civil Legal Services – Dana Nelson, dnelson@teajf.org
- Interest on Lawyers Trust Accounts – Isaac Harrington, lharrington@teajf.org
- Legal Aid for Veterans - Lisa D Melton, LDMelton@teajf.org
- Direct questions about the online grants system to Becca Hall at Bhall@teajf.org.

¹ Complete list of **Funded Legal Services Categories** can be found at Attachment I.

² **Basic Civil Legal Services (BCLS)** – November 1, 2025 – August 31, 2029

Interest on Lawyers Trust Accounts (IOLTA) - November 1, 2025 – August 31, 2029

Legal Aid for Veterans (LAV) Gala – September 1, 2025 – August 31, 2027



2025 Funding Opportunities

APPLICATION INSTRUCTIONS

SUBMISSION VIA [WEBGRANTS](#) ONLY

*****PAPER APPLICATIONS WILL NOT BE ACCEPTED*****

DEADLINE: NO LATER THAN 5 PM on August 7, 2025

*****LATE SUBMISSIONS WILL NOT BE ACCEPTED*****

Applicants are **strongly urged** to submit applications in advance of the deadline to allow for processing and uploading documents to the Grants Online System. Below are the grant programs available.

GRANTS CRITERIA

In 1984, the Supreme Court of Texas (Court) created the Texas Access to Justice Foundation (TAJF), a 501 (c)(3) nonprofit corporation, to administer funding for civil legal aid for poor Texans. TAJF is committed to the vision that all Texans will have equal access to justice regardless of their income.

Since its inception over 40 years ago, TAJF has awarded more than \$1.76 billion to nonprofit organizations in Texas to provide free legal services to disadvantaged Texans and is the leading funding source for civil legal aid in Texas. Civil legal aid provides access to legal help for people to protect their livelihoods, their health and their families and is a vital component of a fair and equitable legal system. Annually, over 100,000 Texans from all parts of the state receive civil legal services from the 35 current TAJF grantees.

ELIGIBILITY: To receive funds, an applicant organization **MUST**:

- Be in good standing as a Texas 501(c)(3) non-profit corporation.
- Have the delivery of free civil legal aid to low-income Texans as a primary purpose.
- Currently provide free civil legal services within the allowable legal services categories
- Be current in all filings required to be made by it with any governmental authority.
- Be an equal employment opportunity employer, and
- Be able to demonstrate that it can utilize any funds granted to it in a manner consistent with TAJF rules and policies.
- Maintain open records and conduct open meetings, **subject to reasonable limitations for an organization of its type.**

Any organization requesting funds from TAJF must be able to:

1. demonstrate that it keeps and maintains its financial records in accordance with generally accepted accounting principles for organizations of its type and
2. furnish reports to TAJF in such form and with such information as required.

All applicants must show the capability to conduct intake and screen and document client eligibility and track and report on all TAJF funds and funded activities.

Applicants must be able to track and record all requested data and information required by TAJF. See Attachment I (Funded Legal Services Categories) & Attachment II (TAJF Data Collection Handbook).

Applicants must sign compliance grant assurances (see Attachment V) that clearly provide restrictions on the use of the funds; provide quarterly and annual certifications and other reporting requirements, demonstrating use of funds and adherence to all grant requirements.

TAJF will not consider any applications for funding unless the organization is **currently** providing free civil legal aid to low-income individuals or is an existing bar association interested in developing a pro bono program.

TAJF, recognizing the size and vast geographic diversity of the state and the unique needs of its various areas, will consider the following criteria in making grants:

- Track record of the applicant organization
- Types of legal aid provided by the applicant
- Availability of other funding for the proposed project
- The number of other organizations in the service area providing similar services
- Requests for one-time needs, e.g., capital additions, outreach campaigns
- Special or underserved populations
- Funds available in-service area
- Unmet needs
- Collaborative efforts
- Potential for leveraging other resources
- Development and expansion of pro bono
- Probability of availability of other future funding sources

DESCRIPTION OF AVAILABLE GRANT PROGRAMS

2025-2029 - BCLS Discretionary	Basic Civil Legal Services (BCLS) - Discretionary (Statewide)*
2025-2029 - BCLS Low Income	Basic Civil Legal Services (BCLS) - Low-Income Population*
2025-2029 - IOLTA Discretionary	Interest on Lawyers Trust Accounts (IOLTA) - Discretionary (Statewide)*
2025-2029 - IOLTA Low Income	Interest on Lawyers Trust Accounts (IOLTA) - Low-Income Population*
2025-2027 – LASSA	Legal Aid for Survivors of Sexual Assault (LASSA)**
2025-2027 – LAV	Legal Aid for Veterans (LAV)**

**BCLS and IOLTA grants are for a 4-year, annually renewable, grant term with quarterly reporting and fund releases.*

***LASSA and LAV grants are for a 2-year, annually renewable, grant term with quarterly reporting and fund releases.*

Basic Civil Legal Services (BCLS): TAJF administers the Basic Civil Legal Services (BCLS) Program on behalf of the Court. BCLS was enacted by the Texas Legislature in 1997 and currently funded by the State Treasury under Strategy B.1.1. Court Programs: Basic Civil Legal Services. These funds must be awarded by TAJF to provide free legal assistance to eligible clients only in civil matters.

Interest on Lawyers' Trust Accounts (IOLTA): Established in 1984 by the Supreme Court of Texas, TAJF is designated by the Court to administer the IOLTA Program. The IOLTA program requires attorneys to pool short-term or nominal deposits made on behalf of clients or third parties into one account. Interest generated by these accounts is dedicated to supporting the provision of free civil Legal Aid to low-income people in Texas.

Legal Aid for Survivors of Sexual Assault (LASSA): A funding program established in 2017, for 2025-2027 the Texas Supreme Court received \$10 million from the Texas Legislature for civil legal services for survivors of sexual assault, including human trafficking. Nine organizations have received LASSA funds to provide a statewide network of access to civil legal services related to victimization, including a statewide hotline. LASSA's website (LASSATexas.org) connects the statewide collaborative to better serve survivors.

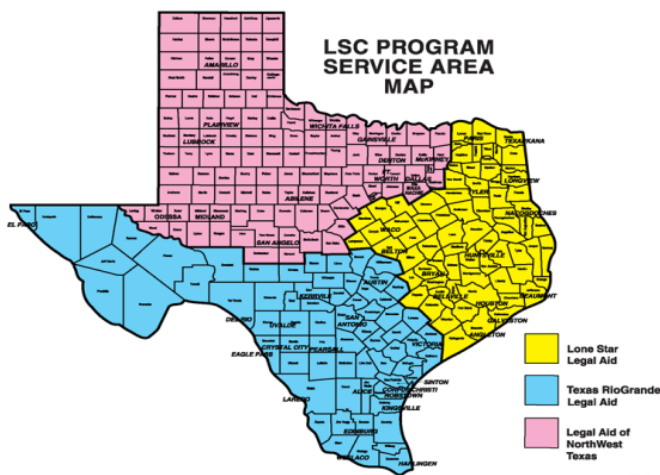
Legal Aid for Veterans (LAV): In 2017, the Court appointed TAJF to administer state-allocated veterans legal services funding. For 18 years, the Texas Access to Justice Commission and the State Bar of Texas have been hosting the Champions of Justice Gala to also benefit Legal Aid for Texas Veterans. The 2025 Gala increased funding for this grant program by 100% allowing TAJF to seek applicants for new projects to serve veterans. Funds raised through the Gala supplement the LAV funding appropriated by the Texas Legislature, expanding reach and impact of the program.

GRANT RESTRICTIONS Each grant program has its own set of restrictions. Applicants are responsible for ensuring eligibility for the requested funding. The [IOLTA Rules](#), and [BCLS Order](#) provide additional eligibility information. (See also [Funding Restrictions](#)).

GRANT CATEGORIES: DISCRETIONARY & LOW-INCOME

There are two categories of grants for this funding opportunity: “Discretionary” also known as state-wide and ‘Low-Income” or regional. TAJF has divided the state into three regions consistent with the federal funding provided by the Legal Services Corporation: Northwest, East/Gulf Coast, and Southwest.

- **Discretionary (Disc)** Funding projects of a statewide nature; services provided across the regional boundaries established and adopted by TAJF consistent with the geographic services areas used by the Legal Services Corporation.
- **Low-Income (LP)**-Funded within one of the three recognized regions, East, Southwest, and Northwest. See list of counties included in each region in Attachment III. Funding between the regions is allocated by poverty population.



An applicant for a Low-Income grant is limited to offering legal services in one region. Requests to serve additional regions require approval. Only applicants seeking and awarded funds in the discretionary category have the flexibility to use TAJF funds across regional boundaries.

FINANCIAL ELIGIBILITY FOR CLIENTS SERVED WITH TAJF FUNDS

TAJF annually issues financial income guidelines (see Attachment IV). These guidelines establish maximum income levels for individuals and families eligible for legal assistance from TAJF-funded legal

aid programs. IOLTA & BCLS guidelines are based on 125% of the federal poverty guidelines (FPG) as established by the U.S. Department of Health and Human Services. Legal Aid for Veterans sets eligibility at 200% of FPG.

AUDIT REQUIREMENTS

If an applicant is funded, TAJF requires all financial audit reports from all grantees to include the management letter issued by the grantee's auditing firm (i.e. "letter to those charged with governance" – per AU-C §260, formerly SAS 114), as well as an "Internal Control Deficiency Letter" (per AU-C §265, formerly SAS 115) if one has been issued.

IOLTA - Minimally, all IOLTA-funded grantees must submit an annual financial statement for the fiscal year ended most recently within one hundred twenty (120) days of the close of their fiscal year. The financial statement must be prepared in conformity with generally accepted accounting principles and must be audited or reviewed by an independent certified public accountant.

BCLS Grantees - All BCLS-funded grantees must submit an annual independent audit within 120 days of the close of their fiscal year. The audits must be in accordance with the State of Texas Single Audit Circular and require that the audits are made by an independent auditor in accordance with generally accepted government auditing standards covering financial and compliance audits. Grantees must comply with the applicable federal and state laws, rules and regulations, directives, guidelines, OMBs, executive orders, and Uniform Grant Management Standards.

The audits must include a supplemental schedule showing revenue and expenses from the grant by natural classification. The financial statement must be audited by an independent certified public accountant and be conducted in compliance with the Basic Civil Legal Services Program Compliance Supplement dealing exclusively with restrictions imposed on the Funds. All BCLS grantees must be audited regardless of the size of the grant award.

CERTIFICATIONS FOR BCLS GRANTEES

Grantees must certify in writing (i) at the commencement of the grant year that no funds will be used for any activities prohibited by the BCLS Act or Supreme Court Rules and (ii) quarterly during the grant year that no funds have been used for such prohibited activities.

DOCUMENTS THAT WILL BE REQUIRED FROM NEW APPLICANTS

Before you register, please review the criteria below. You are required to upload the documents below into the online grants system:

1. Certificate of professional liability and malpractice coverage or copy of cover page from your organization's professional liability and malpractice coverage.
2. Proof of 501 (c)(3) status- IRS 501(c)(3) determination letter
3. Most recent 12 months of Board minutes
4. Current by-laws and Articles of Incorporation
5. Case acceptance policies/priorities
6. Current client financial eligibility guidelines

7. If clients are charged fees, provide the most recent fee schedule with an explanation about all circumstances in which fees are required and/or waived.
8. Client applicant grievance/appeal procedures, or an explanation of why you one does not exist.
9. Last year's financial audit and 990
10. If the organization has multiple offices, list of offices and their locations.
11. Current Board of Directors roster with terms of service
12. Organizational structure, organizational chart, and last year's Organizational budget
13. Breakdown of legal services cases closed in last calendar year by type, level of service and county of client residence.
14. List of Attorneys

GRANT APPLICATIONS MUST BE SUBMITTED ONLINE THRU WEB GRANTS

Grant applications are submitted online through the TAJF web grants online system which requires new applicants to [register](#) and if approved by TAJF, applicants will be provided a user name and password to complete the application. Organizations will only need to register once. Applicants must complete the online application, upload all required documents and **submit it by the due date of Thursday, August 7, 2025, by 5:00 pm Central Time.**

You can access the online grants system by going to <http://grants.tajf.org>. Find instructions on how to use WebGrants on our [website](#).

You then select the funding opportunity for which you intend to apply under one of the following:

2025-2029 - BCLS Discretionary	Basic Civil Legal Services (BCLS) - Discretionary (Statewide)*
2025-2029 - BCLS Low Income	Basic Civil Legal Services (BCLS) - Low-Income Population*
2025-2029 - IOLTA Discretionary	Interest on Lawyers Trust Accounts (IOLTA) - Discretionary (Statewide)*
2025-2029 - IOLTA Low Income	Interest on Lawyers Trust Accounts (IOLTA) - Low-Income Population*
2025-2027 – LASSA	Legal Aid for Survivors of Sexual Assault (LASSA)**
2025-2027 – LAV	Legal Aid for Veterans (LAV)**

LIST OF ATTACHMENTS

- I. FUNDED LEGAL SERVICES CATEGORIES
- II. DATA COLLECTION HANDBOOK- LEGAL PROBLEM CODES & OUTCOMES
- III. TAJF SERVICE REGIONS -COUNTIES LISTING BY SERVICE AREA
- IV. 2025 INCOME & ASSET REQUIREMENTS QUALIFYING TEXANS FOR ASSISTANCE WITH TAJF GRANTS
- V. EXPLANATION OF BUDGET CATEGORIES
- VI. SAMPLE GRANT ASSURANCES

ATTACHMENT I

Funded Legal Services Categories

To clarify our application process, TAJF is categorizing areas of legal services case work so applicants can easily indicate all areas of practice for which they seek funds.

I. Housing: Supporting safe and secure housing

Federally Subsidized Housing
Homeownership/Real Property
Housing Discrimination
Mobile Homes

Mortgage Foreclosures
Mortgage Predatory Lending/Practices
Private Landlord/Tenant
Public Housing

II. Children & Families: Supporting safe, stable environments for children, youth, and families

Adoption
Custody/Visitation
Divorce/Separation/Annulment
Educational Access
Emancipation
Family Unity
Juveniles

Guardian/Conservatorship
Name Change
Abandonment or Neglect/Abused/Dependent
Parental Rights
Paternity
Support

III. Health, Safety & Access: Supporting access to safety, care, and stability

Adult Guardian/Conservatorship
Advance Directives/Powers of Attorney
Children's Health Insurance Programs
Crime Victims Compensation
Disability Rights
Disaster
Domestic Abuse
Home and Community Based Care
Human Trafficking

Long Term Health Care Facilities
Medicaid
Medicare
Mental Health
Physical Safety
Private Health Insurance
Sexual Assault
Special Education/Learning Disabilities
State and Local Health

IV. Financial: Supporting stability and financial independence

Bankruptcy/Debtor Relief
Collection
Collection Practices/Creditor Harassment
Contracts/Warranties
Employment
Expungement, Expunctions, Non-disclosure
Tribal Law
Legal Assistance to Non-Profit Organization or Group
Licenses (Drivers, Occupational, and Others)
Loans/Installment Purchase
Municipal Legal Needs
Predatory Lending Practices
Public Utilities

Social Security
Social Security Disability Income
State and Local Income Maintenance
Student Financial Aid
Supplemental Nutrition Assistance Program
Supplemental Security Income
Temporary Assistance to Needy Families
Torts Defense
Unemployment Compensation
Unfair and Deceptive Sales and Practices
Veterans Benefits
Vocational Education
Wills/Estates

ATTACHMENT II

Texas Access to Justice Foundation Data Collection Handbook

Introduction – The Texas Access to Justice Foundation (TAJF) relies on grant applicant data to measure productivity by grantees funded by TAJF as well as create a statewide picture of legal services delivery in Texas. The goal of this document is to facilitate consistent, reliable data collection by providing definitions for many of the data categories and answering frequently asked questions.

The six data points listed below are needed for the outcomes reporting process. They are recorded at case completion by the advocate responsible for the case. These are discussed in more detail in the following subsections.

- a. Legal problem code*
- b. Major reason case closed / level of service code*
- c. Outcome code*
- d. Contested (Yes/No)
- e. Number of people directly affected
- f. Dollar benefits awarded client
 - (1) Back Award
 - (2) Benefit per month going forward

a. Legal Problem Code. This is the standard "Problem Code" that programs have been using for years to report cases to TAJF on the Annual Closed Case Summary Report.

b. Major Reason Case Closed/Level of Service Code. This is the Standard "Major Reason Cases Closed Code" that programs have been using for years to report cases to TAJF on the Annual Closed Case Summary Report.

c. Outcome Code. When the case is closed, the advocate responsible for the case determines what is the single most significant outcome that was achieved, selected from a list of possibilities and associated codes developed by the TAJF Program Assessment Committee. **Some benefit categories encompass multiple benefits --*

d. Contested (Yes/No). The advocate indicates whether the case was "contested" i.e., whether it was litigated or involved contested case hearings while it was an active case of your program.

e. Number of people directly affected. At case closure the advocate determines this number based on her/his knowledge of the circumstances of the case. Each TAJF grantee will need to develop guidelines for staff members to apply in making this judgment. In most cases the "default" value will be the number of people in the client's household. However, in some cases a different figure will be more appropriate. For example, if the benefit was "Obtained a Divorce . . . ," the advocate might make the judgment that only the client and her children were benefited, not the entire household.

f. Dollar benefits awarded client. Certain types of cases seek to generate monetary benefits for

the client. These include such things as child support, alimony, Social Security Disability and unemployment insurance benefits. If a "dollar benefits" type of case is successful, the advocate responsible for the case records two additional pieces of information at closure:

- (1) **Back award amount.** Record any lump-sum amount that was included in a decision or negotiated settlement, e.g., an award of \$5,000 in retroactive SSI Disability benefits for which the client was found eligible.
- (2) **Monthly benefit amount.** Record the dollar amount that the client will receive per month going forward. For example, if a client was awarded a child support amount of \$300 per month, you would record "\$300".

Please note affirmative benefits only. By "dollar benefits", we mean affirmative monetary awards achieved, not debts reduced, or payments avoided. Although reducing clients' liabilities is unquestionably an important benefit that legal advocates provide, it is not the subject of this data collection effort.

For guidance on estimating dollar benefits for each case, refer to "Questions and Answers about Client Outcomes Reporting"

CASE DEFINITIONS

Case:	A "case" is a distinct legal problem or a set of closely related legal problems of a client, and legal activities or processes used in resolving those problems. The case must have been accepted by the program and includes advice, counsel and limited action, as well as other types of legal representation. A client with two or more closely related problems will be considered as presenting a single case if all the problems are/will be resolved through a single legal process or forum. The provision of legal information solely does not constitute a case.
Legal Information: NOT REPORTABLE AS CASE	Legal information is defined as the provision of substantive information not tailored to address a person's specific legal problem. As such, it is general and does not involve applying legal judgment and does not recommend a specific course of action. For example, providing only a pamphlet or brochure is legal information and not legal assistance. The provision of legal information does not create an attorney-client relationship. Legal information alone is not legal assistance, and the provision of legal information may not be reported as a Case Service Report number. However, this should be tracked and documented so as available for other non-case reports.

TIMEKEEPING

(a) All expenditures of funds for grantee actions are, by definition, for cases, matters, or supporting activities. The allocation of all expenditures must be carried out in accordance with the Texas Uniform Grant Management Standards (UGMS).

(b) Time spent by attorneys, paralegals (including any non-attorney operating as a primary handler of cases such as accredited representatives in the immigration field) must be documented by time records which record the amount of time spent on each case, matter, or supporting activity.

(1) Time records must be created contemporaneously and account for time by date and in increments not greater than one-quarter of an hour which comprises all the efforts of the attorneys and paralegals for which compensation is paid by the grantee.

(2) Each record of time spent must contain:

- i. for a case, a unique client name or case number.
- ii. for matters or supporting activities, an identification of the category of action on which the time was spent.

(c) The timekeeping system must be able to aggregate time record information on both closed and pending cases by legal problem type, funding source, client eligibility if grantees offer assistance using non-TAJF funds to non-eligible TAJF clients.

(d) Grantees shall require any attorney or paralegal who works part-time for the grantee and part-time for an organization that engages in restricted activities to certify in writing that the attorney or paralegal has not engaged in restricted activity during any time for which the attorney or paralegal was compensated by the grantee or has not used grantee resources for restricted activities. The certification requirement does not apply to a *de minimis* action related to a restricted activity. Actions consistent with the *de minimis* standard are those that meet all or most of the following criteria: actions that are of little substance; require little time; are not initiated by the part-time employee; and, for the most part, are unavoidable.

TAJF funded legal aid programs may record and report the provision of legal assistance as a **case** only if:

- (a) The client is financially and otherwise **eligible** to receive legal assistance under grant requirements.
- (b) The client's case is within **program priorities** (or is an emergency case accepted under the program's emergency case acceptance procedures).
- (c) the legal services program has accepted the client for service through its intake system or another established procedure for ensuring client eligibility;³

³ The point at which a case is "accepted" for service depends on the type of service provided and the process by which the program provides the service. For example, when an eligible applicant seeks advice over the telephone, "acceptance" occurs when a staff member or participating private attorney determines that the applicant qualifies for service and indicates acceptance of the case through assignment of a case number or other means of demonstrating case acceptance (e.g., a notation in the file).

(d) the **legal assistance provided** to the client meets the criteria of one of the case service reports Closure Categories utilized by funders such as the Texas Access to Justice Foundation (TAJF) or the Legal Services Corporation (LSC).

(e) the type of **legal assistance** provided to the client is not prohibited by the funding source and,

(f) the **legal problem(s)** of the client are not of a type prohibited by the funding source

USE OF AUTOMATED CASE MANAGEMENT/INFORMATION SYSTEMS

Grantees shall utilize automated case management/information systems (CMIS) and procedures that ensure that information necessary for the effective management of cases is accurately and timely recorded in a case management system. Such systems and procedures ensure that grantee management has:

- (a) timely access to accurate information on cases; and
- (b) the capacity to meet funding sources' reporting requirements.

To meet reporting requirements, grantees' case management/information systems and procedures shall include the ability to report cases by funding source, grant type (e.g., IOLTA, BCLS,), pro bono component, county with zip code of client residence and client profile including the following types of populations: veterans, homeless, victims of crime, physically impaired, victims of domestic violence, persons with AID/HIV or with a terminal illness.

Grantees must also be able to record and report to TAJF on the number of applicants/clients who are TAJF eligible and apply for legal representation and if their problem falls within the services offered by grantee but due to limited resources, limited or *pro se* assistance is provided as opposed to full or extended representation.

Case management/information systems should also employ sufficient technological capacity to ensure cost effective and efficient management of data and workflow. Hallmarks of sufficient technological capacity include:

1. single entry of data.
2. automated reporting that eliminates onerous and time-consuming manual calculation or tabulation.
3. the ability to readily review data and information from multiple perspectives; and
4. the promotion of data integrity and assistance in the identification of erroneous data.

Furthermore, grantees should keep their case management system technology sufficiently up to date to enable them to benefit from future technological advances.

MANAGEMENT REVIEW OF CASE SERVICE REPORTS

Grantees shall institute procedures for ensuring management review of case service information for accuracy and completeness prior to its submission to TAJF. At a minimum, such procedures shall include either a review of management reports or another method of review that ensures that cases are timely closed and are not reported more than once in the same year.

In addition, the executive director, or a designee, shall review the grantee's case service reports prior to their submission to TAJF to ensure that the information contained in the reports fairly represents the volume and types of Case Service Reports cases that the grantee provided during the grant year. When necessary to determine the accuracy of case service information, grantees shall have the capacity to generate a detailed listing of open and closed cases to support case service information reported to TAJF.

Definition of Legal Assistance

For case service reports purposes, legal assistance is defined as the provision of limited service or extended service on behalf of a client or clients that meets the criteria of the case service reports Closing Categories used by TAJF or LSC. Legal assistance is specific to the client's unique circumstances and involves a legal analysis that is tailored to the client's factual situation. Legal assistance involves applying legal judgment in interpreting the particular facts and in applying relevant law to the facts presented.⁴ The provision of legal assistance creates an attorney-client relationship.

Definition of Client

For case service reports purposes, a client is defined as a person (or group) who is:

- (a) ***financially and otherwise eligible*** to receive legal assistance under the funding source rules, regulations, policies, guidelines and other applicable law, regardless of source of funding used by the program; and
- (b) ***accepted*** for legal assistance through an intake system or other established program procedure for ensuring client eligibility.

For case service reports purposes, to be eligible for and accepted for legal assistance and to be reported as a case service reports case, a **client** must meet the financial (including both income and assets) and other eligibility requirements of the funding source

Who Can Provide Legal Assistance

Legal assistance in a case must be provided by an attorney authorized to practice law in the jurisdiction where assistance is rendered or a non-attorney under the direct supervision of a licensed attorney in accordance with the rules of practice in the jurisdiction(s) where the program provides assistance (unless the jurisdiction or forum allows waiver of attorney supervision or allows legal assistance by a

⁴ Assistance that is not legal in nature, e.g. provision of a social service, referral for financial assistance or other assistance, is not legal assistance.

non-attorney under specific circumstances). A person providing assistance in a case need not have the job title of “attorney” or “paralegal”, but any such individual must be authorized to provide legal assistance in accordance with applicable rules of practice and must keep time records as required by a funding source.

Alternative Forms of Service

Programs may provide alternative forms of service such as alternative dispute resolution, *pro se* clinics, workshops, legal education, kiosks, and web assistance.

- (a) However, such alternative services may not be reported as a case unless:
 - (i) the service provided qualifies as a case, as defined above,
 - (ii) the service provided qualifies as legal assistance as defined above,
 - (iii) the person receiving the service is a client as defined above, and
 - (iv) the person providing the service is an attorney or a non-attorney under the direct supervision of a licensed attorney in accordance with the rules of practice in the jurisdiction(s) where the program provides assistance (unless the jurisdiction or forum allows waiver of attorney supervision or allows legal assistance by a non-attorney under specific circumstances) as stated above.
- (b) Programs may report alternative forms of service under the case service reports category that best fits the actual service provided. If the program provides legal information as opposed to legal assistance, the service provided is a matter and not a case.⁵
- (c) County – The county reported with the case data should be the county of residence of the client. If the client has moved since the case was started and the case reports are showing a current county address, there is no need to go back and recreate the county of residence at intake. The county of residence at any point in the case is acceptable.
- (d) Legal Representation – Service to a client that is specific to the client’s unique circumstances and involves a legal analysis that is tailored to the client’s factual situation.

⁵ See also ABA Standards for the Provision of Civil Legal Aid (2006), Standard 3.6 on the Provision of Legal Information.

Major Reason Case Closed Definitions

LIMITED-SERVICE CASE CATEGORIES⁶

Counsel and Advice:	A case closed due to the provision and receipt of legal advice to an eligible client, e.g., the review of relevant facts, exercised judgment in interpreting the particular facts presented and in applying the relevant law to the facts, and the counseling of the client on actions to take to address the problem(s).
Limited Action:	A case closed through limited action(s) on behalf of an eligible client that addressed the client's legal problem that is not as complex or extended as to meet the requirements for "extensive service". Examples include communications by letter, telephone or other means to a third party; preparation of a simple legal document such as a routine will or power of attorney; or legal assistance to a pro se client that involves preparation of court or other legal documents.

EXTENDED SERVICE CASE CATEGORIES

Negotiated Settlement without litigation:	A case closed through negotiation where an actual settlement was reached on behalf of a client without any court or administrative actions pending. This category should be reserved for cases in which the advocate conferred with another party to reach a resolution of the client's legal problem.
Negotiated Settlement with litigation:	A case closed through neg. where settlement was reached while a court or administrative action was pending. This is reserved for cases in which the advocate conferred with another party to resolve client's problem and where an appearance has been entered as counsel; not assisting a pro se client.
Administrative Agency Decision:	A case closed because of the representation of a client in an administrative agency action that resulted in a case-dispositive decision by the administrative agency or body, after a hearing or other formal administrative process. This category does not include settlements made during litigation that are then approved by the administrative agency, voluntary dismissals or the grant of a motion to withdraw as counsel.
Court Decision:	A case closed in which the advocate represented a client in a court proceeding that resulted in a case dispositive decision made by the court should be closed as a Court Decision. This category is divided into the following three subcategories:
(a) Uncontested Court Decisions	either there is no adverse party, or the adverse party does not contest the case;

⁶ CSR Closure Categories A and B include cases in which a referral has been made after the legal assistance was provided. Referrals without the provision of legal assistance should be reported as Other Services under the OSR system.

(b) Contested Court Decisions	there is an adverse party and that party contests the case;
(c) Appeals	Appeals to an appellate court taken from a decision of any final court or tribunal
Other:	A closed case that does not fit any of the preceding case closure categories. Cases which fit two or more CSR categories may not be closed in this category, but should be closed in the category which best reflects the level of service provided.
Extensive Service (not resulting in Settlement or Court or Administrative Action)	A case closed in which the program undertook extensive research, preparation of complex legal documents, extensive interaction with third parties on behalf of an eligible client, or extensive on-going assistance to clients who are proceeding pro se should be closed as Extensive Service. Some examples are preparation of complex advance directives, wills, contracts, real estate documents or other legal documents, or the provision of extensive transactional work. This category also includes cases closed after extensive interaction or negotiations with another party which do not result in a negotiated settlement. In addition, cases closed after litigation are initiated in which the program appears as counsel of record that do not result in a negotiated settlement, administrative agency or court decision, or in which an order of withdrawal or voluntary dismissal is entered should be closed in this category.

LEGAL PROBLEM CODES/OUTCOMES & MAJOR BENEFITS – In the annual Self-Assessment Report, cases will be coded, and you will be asked to record case types according to those codes. Those codes will track Attachment I above.

Data Quality Procedures

- A. Grantees should have a process for ensuring the timely closing of cases.
- B. Grantees should report all legal work cases closed by the organization in the calendar year, regardless of the source of funding for those cases provided it was free to the client and the client's household income did not exceed 200% poverty level as described in the TAJF Financial Eligibility Guidelines.
- C. Grantees should have case management systems in place that ensures that cases involving the same client and same legal problem are not recorded and reported more than once.

What an Automated Case Management System Should Do

Programs shall utilize automated case management systems (CMS) and procedures that ensure that information necessary for the effective management of cases is accurately and timely recorded in a case management system. Such systems and procedures shall ensure that program management has:

- (a) timely access to accurate information on cases; and
- (b) the capacity to meet funding sources' reporting requirements.

To meet grant reporting requirements, programs' case management systems and procedures shall include the ability to report cases by funding source, grant type, Pro Bono component, jurisdiction (e.g., county or city), and individual office.

Case management systems should also employ sufficient technological capacity to ensure cost effective and efficient management of data and workflow. Hallmarks of sufficient technological capacity include:

- single entry of data.
- automated reporting that eliminates onerous and time-consuming manual calculation or tabulation.
- the ability to readily review data and information from multiple perspectives; and
- the promotion of data integrity and assistance in the identification of erroneous data.

Furthermore, programs should keep their case management system technology sufficiently up to date to enable them to benefit from future technological advances.

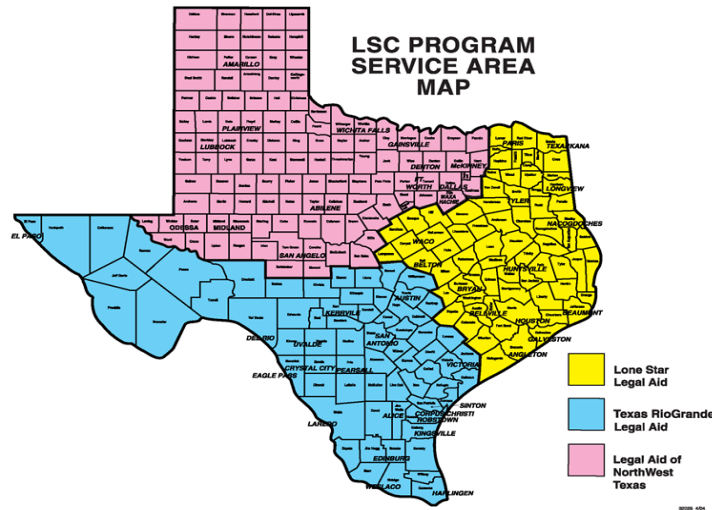
Cases involving multiple levels of assistance – The grantee shall report only the highest level of service provided when more than one type of service is provided to a client during the same calendar year when attempting to resolve essentially the same legal problem, as demonstrated by the factual circumstances that give rise to the problem. For example, if the grantee initially serves a client at an Advice Only clinic, but then later provides Extended Representation on the same legal problem, the case should be reported only once as Extended Representation.

Cases involving repeated instances of assistance – The grantee shall report repeated instances of assistance to the client as a single case when a program provides assistance more than once within the same calendar year to an eligible client who has returned to the program with essentially the same legal problem, as demonstrated by the factual circumstances giving rise to the problem.

Cases involving related legal problems:

- a. Advice Only Cases – The presumption is that legal assistance provided on related legal issues within a brief time frame is counted as one case. However, the presumption is rebutted, and two or more cases may be reported if the legal issues on which advice is given fall into different types, such as Family and Housing.
- b. Appeals – An appeal can be counted as a separate case.
- c. All Other Cases – Grantees shall report related legal problems of an eligible client as a single case when the program representing the client attempts to resolve the related legal problems simultaneously through the same legal process. For example, if a client seeks assistance with related child custody and support problems and the grantee assists the client by preparing a pleading or other document that addresses both problems that should be reported as a single case. However, if child custody and child support are addressed in different actions or in different courts, then more than one case should be reported for the client.

ATTACHMENT III–TAJF Service Regions



Southwest Texas – Blue

Aransas, Atascosa, Bandera, Bastrop, Bee, Bexar, Blanco, Brewster, Brooks, Burnet, Caldwell, Calhoun, Cameron, Comal, Crockett, Culberson, Dewitt, Dimmit, Duval, Edwards, El Paso, Frio, Gillespie, Goliad, Gonzales, Guadalupe, Hays, Hidalgo, Hudspeth, Jackson, Jeff Davis, Jim Hogg, Jim Wells, Karnes, Kendall, Kenedy, Kerr, Kimble, Kinney, Kleberg, Lasalle, Lavaca, Live Oak, Llano, Mason, Maverick, McMullen, Medina, Nueces, Pecos, Presidio, Real, Reeves, Refugio, San Patricio, Starr, Sutton, Terrell, Travis, Uvalde, Val Verde, Victoria, Webb, Willacy, Williamson, Wilson, Zapata, Zavala.

Northwest Texas –Pink

Andrews, Archer, Armstrong, Bailey, Baylor, Borden, Briscoe, Brown, Callahan, Carson, Castro, Childress, Clay, Cochran, Coke, Coleman, Collin, Collingsworth, Comanche, Concho, Cooke, Cottle, Crane, Crosby, Dallam, Dallas, Dawson, Deaf Smith, Denton, Dickens, Donley, Eastland, Ector, Ellis, Erath, Fannin, Fisher, Floyd, Foard, Gaines, Garza, Glasscock, Gray, Grayson, Hale, Hall, Hansford, Hardeman, Hartley, Haskell, Hemphill, Hockley, Hood, Howard, Hunt, Hutchinson, Irion, Jack, Johnson, Jones, Kaufman, Kent, King, Knox, Lamb, Lipscomb, Loving, Lubbock, Lynn, Martin, McCulloch, Menard, Midland, Mills, Mitchell, Montague, Moore, Motley, Nolan, Ochiltree, Oldham, Palo Pinto, Parker, Parmer, Potter, Randall, Reagan, Roberts, Rockwall, Runnels, San Saba, Schleicher, Scurry, Shackelford, Sherman, Somervell, Stephens, Sterling, Stonewall, Swisher, Tarrant, Taylor, Terry, Throckmorton, Tom Green, Upton, Ward, Wheeler, Wichita, Wilbarger, Winkler, Wise, Yoakum, Young.

East/Gulf Coast Texas – Yellow

Anderson, Angelina, Austin, Bell, Bosque, Bowie, Brazoria, Brazos, Burleson, Camp, Cass, Chambers, Cherokee, Colorado, Coryell, Delta, Falls, Fayette, Fort Bend, Franklin, Freestone, Galveston, Gregg, Grimes, Hamilton, Hardin, Harris, Harrison, Henderson, Hill, Hopkins, Houston, Jasper, Jefferson, Lamar, Lampasas, Lee, Leon, Liberty, Limestone, Madison, Marion, Matagorda, McLennan, Milam, Montgomery, Morris, Nacogdoches, Navarro, Newton, Orange, Panola, Polk, Rains, Red River, Robertson, Rusk, Sabine, San Augustine, San Jacinto, Shelby, Smith, Titus, Trinity, Tyler, Upshur, Van Zandt, Walker, Waller, Washington, Wharton.

ATTACHMENT IV
**2025 Income & Asset Requirements for Persons to be Eligible
for Assistance with Foundation Grants**

Each year, the Texas Access to Justice Foundation (TAJF) adopts criteria relating to income, assets, and liabilities defining the indigent persons eligible to benefit from TAJF grants. Household income-eligibility guidelines are based on the Department of Health and Human Services' (DHHS) most recent federal poverty guidelines. DHHS issues these guidelines each year in the Federal Register.

These guidelines establish maximum household income levels for individuals and families eligible for assistance from TAJF-funded legal aid programs whether funded by Interest on Lawyers Trust Accounts (IOLTA), Basic Civil Legal Services (BCLS), Crime Victim Civil Legal Services (CVCLS), Legal Aid to Veterans (LAV), Legal Aid to Survivors of Sexual Assault (LASSA), Legal Aid to Homeowners and Communities (LACH) or any other TAJF grant funds. The purpose of the criteria for house income, asset, and liabilities is to determine whether an individual qualifies for legal assistance under one of the TAJF grants.

Organizations receiving any TAJF grants must use such funds to provide free civil legal services to eligible low-income persons or low-income client groups, associations, and nonprofit organizations eligible under these guidelines and the enacting [rules of the source of funds located at the tajf.org website](https://www.tajf.org/rules-of-the-source-of-funds-located-at-the-tajf-org-website). Grantees must adopt and utilize these criteria relating to income, assets, and liabilities defining the indigent persons eligible to benefit from TAJF grants.

See the **2025 Financial Income Guidelines** document for client eligibility under specific grants.

Grantees must have written asset & liabilities criteria in place for defining indigent people eligible for TAJF-funded free civil legal services. See section on Assets Limitations below.

DEFINITIONS

1. Family: Includes only those people related by blood or by law as relatives to the applicants for whom the applicant has a legal responsibility to support.
2. Income: Includes wages & earnings, unemployment compensation, workers' compensation, Social Security, Supplemental Security Income, public assistance, veterans' payments, survivor benefits, pension or retirement income, interest, dividends, rents, royalties, income from estates, trusts, educational assistance, alimony, child support, assistance from outside the household, and other miscellaneous sources.
 - Noncash benefits (such as food stamps and housing subsidies) do not count towards income.
 - Income considered before taxes
 - Income excludes capital gains or losses.
 - If a person lives with a family, add income of all family members. (Non-relatives, such as housemates, do not count unless they contribute regularly to help financially support the household.)
3. Liquid Assets: Assets that can readily and promptly convert to cash by the individual seeking assistance, prior to the time that the assistance is required. Only net liquid assets, after subtracting all expenses of conversion and taxes, are considered.

4. Non-Liquid Assets: All assets other than liquid assets.
5. Available Assets: Assets to which the individual seeking assistance has legal and actual access without having to obtain the consent or cooperation of another person over whom the individual does not have control and who does not, in fact, consent or cooperate

No Exceptions to Income Guidelines

TAJF income guidelines differ from those of Legal Services Corporation (LSC). TAJF does not allow for LSC-type deductions or exceptions to income which reduce household income to meet income guidelines. There are ***no*** provisions in TAJF grant guidelines permitting the reduction of household incomes below TAJF grants' maximum household income caps.

Manner of determining financial eligibility

In making financial eligibility determinations regarding individual applicants, a grantee shall make reasonable inquiries regarding sources of the applicant's income, income prospects and assets. The grantee shall record income and asset information.

In making financial eligibility determinations regarding groups seeking TAJF-supported legal assistance, a grantee shall follow the requirements set forth by the individual TAJF grant.

A grantee shall adopt simple intake forms and procedures to obtain information from applicants and groups to determine financial eligibility in a manner that promotes the development of trust between attorney and client. The forms shall be preserved by the grantee.

If there is substantial reason to doubt the accuracy of the financial eligibility information provided by an applicant or group, a grantee shall make appropriate inquiries to verify the information, in a manner consistent with the attorney-client relationship.

When one grantee has determined that a client is financially eligible for service in a particular case or matter, that grantee may request another grantee to extend legal assistance or undertake representation on behalf of that client in the same case or matter in reliance upon the initial financial eligibility determination. To transfer client's financial eligibility, the referring grantee must provide, and the receiving grantee must retain a copy of the intake form documenting the initial financial eligibility of the client. In such cases, the receiving grantee is not required to review or reassess the client's financial eligibility unless there is a change in financial eligibility status as described below or there is substantial reason to doubt the validity of the original determination.

Grantees' screening and intake procedures must be able to reasonably demonstrate that staff practice and follow procedures uniformly and consistently.

A total amount of the applicant's household income must be recorded even if it is zero. Records of TAJF client eligibility must be retained and be available for inspection in a manner consistent with attorney-client confidentiality.

To determine monthly income, divide annual income by 12. For weekly income, divide annual income by 52, or divide monthly income by 4.2. Your approach must be in writing and used consistently. Income received twice a month should be multiplied by 2 to establish monthly income. If the applicant

is a seasonal employee, consideration can be based on previous year. Applicants shall be informed of their duty to report changes in their income to grantee should grantee accept their case.

If an applicant's total household income is derived solely from a government program for low-income individuals or families on a needs-based test, then the grantee may determine that the applicant is financially eligible based on those benefits. However, the grantee must record household size, household income, and the specific identity of the government program.

Group Representation

Group legal assistance must: 1) be limited to groups with no resources for legal assistance, and 2) benefit the low-income individual or low-income community in which they reside. In representing a client group, association, or nonprofit organization, the grantee must comply with all of the other provisions of these rules and is subject to all of the prohibitions contained herein. A client group, association, or nonprofit organization is eligible to represent a group if it provides information showing that the group lacks, and has no practical means of obtaining, funds to retain private counsel and either:

- i. The group (or the organizing or operating body of a non-membership group) is primarily composed of individuals who would be financially eligible for this TAJF-funded legal assistance, or
- ii. A principal activity of the group is the delivery of services, assistance or advocacy to those persons in the community who are otherwise financially eligible for this TAJF-funded legal assistance and the legal assistance sought relates to such activity, or

Change in Financial Eligibility Status

After determining that a client is financially eligible and after accepting that client for service, the client's changed circumstances may make them ineligible for TAJF funded services. Upon learning that a client is no longer financially eligible for TAJF services, the grantee shall discontinue TAJF supported services and representation as long as: 1) the change in circumstances is sufficient, likely to continue, and enables the client to afford private legal assistance; and 2) discontinuation is consistent with applicable rules of professional responsibility.

This same rule applies when the grantee later determines the client is financially ineligible based on later discovered or disclosed information.

Asset Limitations

Grantees must have an assets & liabilities policy that caps the amount of assets for eligibility determinations regarding TAJF-funded cases and clients. Grantees may select one of the below options or develop an alternative asset policy that is consistent with the intent to provide free civil legal services to indigent individuals. Staff and volunteers must adhere to the policy in determining eligibility for free civil legal services. The policy must be approved by the Board of Directors/Board of Trustees or the governing body of the organization. If the legal program is a component of a larger non-legal aid institution, such as a religious organization, the chief executive officer may approve the policy. In the case of a law school clinical program or bar association pro bono grantee, another designated authorized body or individual beyond the manager/director of the legal aid program must approve policy. The asset policy regarding TAJF eligibility must be in writing and available upon request.

SAMPLE OPTION 1

In general, an individual client may have up to \$10,000 in liquid assets (plus \$5,000 for each additional qualifying family member) and \$15,000 in non-liquid assets (plus \$5,000 for each additional qualifying family member). Exempted from the asset limit are the client's principal residence, one car, personal and household goods, tools, or equipment essential to employment, trusts restricted to educational or medical purposes, interest in IRA or Keogh plans, assets not counted by public assistance programs, and burial plots or trusts.

Where a client owns property, each asset must be identified (e.g., *savings account* or *vacation villa*), and its value must be entered into the client's financial eligibility field in their case-management system or paper application. The client's home, household goods, one car, or checking and/or savings account whose combined value is less than \$2,000 need not be listed. If the client has no countable assets, the grantee will report "*None*" in the appropriate area of the financial eligibility field.

SAMPLE OPTION 2

- 1) An individual seeking assistance may not have total family assets disregarding exclusions, if in excess of the following:
 - a) Liquid assets of \$2,500 or non-liquid assets of \$20,000.
 - b) \$5,000 in liquid assets or \$40,000 in non-liquid assets if a member of the applicant's family is elderly, handicapped, or institutionalized.
- 2) An individual seeking assistance may not have total family assets, disregarding exclusions, in excess of the following:
 - a) Liquid assets in excess of double or non-liquid assets in excess of four times the estimated cost of obtaining private legal assistance for the matter on which assistance is sought.
 - b) Liquid assets in excess of three times the estimated cost of obtaining private legal assistance for the matter on which assistance is sought, if a member of the applicant's family is elderly, handicapped, or institutionalized, in which case non-liquid assets may be disregarded.
- 3) Exclusion: The following items are to be excluded from consideration in determining whether an individual seeking assistance has assets in excess of those permitted:
 - a) The principal residence of an individual seeking assistance, or of any member of the applicant's family.
 - b) The reasonable equity value in work-related equipment which is essential to the employment or self-employment of an applicant or members of an applicant's family.
 - c) Any assets which are exempted from execution by Texas or Federal Law.

2025 FINANCIAL INCOME GUIDELINES⁷

	2025 IOLTA/BCLS/LACHS⁸ Financial Eligibility Guidelines <i>125% of Federal Poverty Guidelines</i>	2025 Federal Poverty Guidelines (FPG)
People in Household	<u>Annual</u> Household Income (125% of FPG)	FPG
1	\$19,563	\$15,650
2	\$26,438	\$21,150
3	\$33,313	\$26,650
4	\$40,188	\$32,150
5	\$47,063	\$37,650
6	\$53,938	\$43,150
7	\$60,813	\$48,650
8	\$67,688	\$54,150
For each additional member of the household in excess of 8, add:	\$6,875	\$5,500

⁷ See 2025 HHS Poverty Guidelines [Poverty Guidelines API](#) with effective date of January 15, 2025.

⁸ Interest on Lawyers Trust Account (IOLTA)/Basic Civil Legal Services (BCLS)/Legal Aid for Children's Health & Security (LACHS)

ATTACHMENT V
Explanation of Budget Categories

1. Definition of Line-Item Expenditure Categories

Lawyers:	This category should include all salaries and wages paid to program attorneys, whether employed directly or supervised by the program, and whether full-time, part-time, or temporary.
Paralegals:	This category should include salaries and wages paid to program paralegals (non-attorney case handlers), whether employed directly or supervised by the program, and whether full-time, part-time, or temporary. Paralegals are persons whose duties consist primarily of assisting in the legal work of clients and litigation support but can also include in client intake and outreach & education activities.
Other Staff:	This category should include salaries and wages paid to all other program staff, whether employed directly or supervised by the program, whether administrative/clerical staff, students, or others, and whether full-time, part-time or temporary.
Employee Benefits:	This category should include the typical fringe benefits paid on behalf of employees, such as retirement, FICA, health and life insurance, worker's compensation, unemployment insurance, and other payroll-related costs.
Space:	This category includes rent, debt service, utility payments, maintenance and janitorial expenses.
Equipment Rental:	This category includes lease or rental expenses for office furniture, fixtures, and equipment (except telephone). It also includes maintenance costs for that equipment whether pursuant to a service contract or individual repair bills.
Supplies:	This category includes all basic office accessories and supplies, including material used in copiers. Printing and postage are included in this category. All equipment purchases under \$100 may be placed under this line item.
Telephone:	This category includes rental of telephone equipment and local and long-distance calls and service. Similar and related expenses such as fax or other telecommunications should be included as well.
Travel:	This category includes travel expenses directly related to specific client matters, circuit riding, administration of the program, etc. While most travel expenses will be local or intra-state, interstate travel may also be included here.
Library:	This category includes expenses for the maintenance of office libraries, including subscriptions to periodicals, books, reference materials, and multiple volume sets of law books. Additions to the library holdings over \$100 should be included under "Capital"
Insurance:	This category includes professional liability insurance, bonding, property insurance (fire and theft), and liability insurance for property and automobiles
Audit:	This category includes expenses for auditors. Outside bookkeeping and accounting services should be reported in "Contract services."
Litigation:	This category includes court costs, witness fees, expert witness expenses, sheriff fees, copying fees, and other expenses incurred but not recovered in litigation on behalf of

	eligible clients.
Capital additions:	This category includes equipment and library purchases over \$100 per item and other major expenses which occur infrequently (e.g. major renovation). However, provide a separate footnote for any purchase more than \$500.
Other:	This category includes all program expenses not included above. Specify each cost included in "Other."

2. Definition of "Program/ Direct" and "Administrative/ indirect" costs

Program Direct Costs:	This category consists of expenditures that are identified specifically with the direct delivery of civil legal services. Program Costs are typically direct costs. Typical Program Costs include the following:
(1)	Compensation of attorneys, paralegals, law clerks, law students and direct support staff for time and effort devoted specifically to the provision of basic civil legal services.
(2)	Cost of materials acquired, consumed or expended specifically for the purposes of the grant.
(3)	Equipment and other approved capital acquisitions necessary to accomplish the purposes of the Grant.
(4)	All other items of expense incurred specifically to carry out the purposes of the Grant.
Administrative Indirect Costs:	This category consists of costs incurred for a common or joint purpose benefiting more than one cost objective, and not readily assignable to the cost objectives specifically benefitted without effort disproportionate to the results achieved. An example might be audit, library, equipment rental, telephone, occupancy unless a specific TAJF fund were funding all staff 100% utilizing all the space.

ATTACHMENT VI
SAMPLE GRANT ASSURANCE

A. General Provisions

1. Applicant certifies that it is currently a 501(c)(3) nonprofit corporation and will restrict the use of TAJF awards to law-related activities or purposes that are charitable or educational within the meaning of Section 501(c)(3) of the Internal Revenue Code and will not use TAJF grant awards for any prohibited purposes.

Applicant represents that it possesses legal authority to apply for the grant. A resolution, motion or similar action has been duly adopted or passed as an official act of the Applicant's governing body, authorizing the filing of the application, including all understandings and assurances contained therein, and directing and authorizing the person identified as the official representative, or the designee of Applicant to act in connection with the application and to provide such additional information as may be required.

2. Applicant will:

- at all times honor the attorney-client privilege and will uphold the integrity of the adversary process.
- not impose restrictions unrelated to statutes and rules of professional conduct on attorneys who provide representations to indigent clients with awards provided in whole or in part by the Court. All awards allocated by the Court will be expended exclusively to support the provision of legal services without charge to low-income persons.
- expend all awards allocated by TAJF exclusively to support services in the county or counties for which the monies were allocated.
- comply with quality control review procedures adopted by TAJF.
- comply with fiscal management and control procedures (Standards for Financial Management Systems and Audits as stated in the General Grant Provisions manual) adopted by TAJF.
- permit site visits and present additional information when deemed reasonably necessary to determine compliance with the Rules.

3. Applicant will restrict the use of TAJF awards to permissible activities and legal services to permissible eligible low-income clients in accordance with the specific TAJF grant program requirements, orders and Rules of the Texas Supreme Court, and statutory requirements. Applicant also understands and agrees that TAJF clients must be income eligible according to TAJF-funded income guidelines. Applicant acknowledges review of the restrictions and income guidelines for TAJF awards and will strictly comply with proper documentation for adequate screening of intake with applicants to ensure eligibility.

4. Applicant certifies that they are an equal opportunity employer. Applicant will not discriminate on the basis of race, creed, religion, marital status, color, national origin, gender, sexual orientation, age or disability, or as otherwise prohibited by the laws of the United States and the State of Texas, against (1) any person applying for employment or employed by the applicant with respect to any personnel action proposed or taken concerning the applicant or employee and (2) any person seeking services, participation in, or the benefits or proceeds of the program or projects supported in whole or part by TAJF awards.

5. Except for matters involving limited advice and brief services (e.g. clinics, hotlines, and similar services), applicants shall execute a written retainer agreement, or letter of engagement with each client who receives legal services from the grantee. For cases that are referred by applicants to pro bono private attorneys, applicants shall make available to the accepting attorney a standard form retainer agreement that may be modified based on agreement between the pro bono attorney and client.

6. Applicant acknowledges that it is responsible for compliance with TAJF grant requirements including rules of the court and specific grant manual provisions that can be located on [TAJF's website](#). Applicant must read and be familiar with the applicable general grant provision manual(s) prior to receipt of any TAJFs awards. Applicant further understands that annual audited financial statements and or audits, along with 990s, must be submitted to TAJF not later than 120 days after the close of the Applicant's fiscal year.

7. Applicant understands and agrees that, by submitting this application, the applicant has no assurances of being funded and, should funds be awarded, TAJF may, in its sole discretion, grant awards in greater or lesser amounts and/or for greater or lesser periods of time than requested in this application.

The grant shall not be construed as creating a debt on behalf of TAJF and the Supreme Court of Texas in violation of Article III, Section 49a of the Texas Constitution. Applicant understands that all obligations of TAJF and the Supreme Court of Texas under the contract are subject to the availability of grant awards.

8. Applicant understands and agrees that the application, once received by TAJF, becomes the property of TAJF.

9. Applicant will promptly notify TAJF of any organizational, programmatic, or budget changes when information in its grant application is no longer correct, or that would render the organization ineligible for a TAJF grant.

10. TexasLawHelp Participation Certification – Applicants understand that they must be listed in the TexasLawHelp directory of legal services. See www.TexasLawHelp.org. Applicant further agrees to provide a link to TexasLawHelp on their own website that will be displayed prominently. Applicant further agrees that if funded for the upcoming grant cycle, applicant will collaborate and contribute material to one or more substantive law folders on TexasLawHelp and consult and cooperate with Texas Legal Services Center, the site's sponsor, as to what content and materials are needed from applicant.

Applicant represents and warrants that it will submit timely, complete, and accurate reports in accordance with the grant and maintain appropriate backup documentation to support the reports.

11. Applicant acknowledges and agrees to comply with the prohibition that funds may not be used for the following activities unless an exception is stated:

- a. Funds may not be used for any case or matter that, if undertaken on behalf of an indigent individual by an attorney in private practice, might reasonably be expected to result in payment of a fee for legal services from an award to an individual client from public funds or from an opposing party. The above provisions shall not be applicable in any case where the grantee determines in good faith that the indigent person seeking legal assistance made a reasonable effort to obtain legal services from an attorney in private practice for the particular legal matter, including contacting attorneys who practice law in the judicial district that is the residence of the indigent individual and who normally accept cases of a similar nature, and the indigent individual has been unable to obtain legal services because the potential fee is inadequate, likely uncollectable, would substantially consume recovery, or otherwise prevent applicant from obtaining counsel;
- b. Funds may not be used to directly or indirectly support a class action lawsuit, a lawsuit against a governmental entity, or lobbying for or against any candidate or issue. Provided, however, that funds may be granted to finance suits against governmental entities on behalf of individuals in order to secure entitlement to benefits such as, but not limited to, social security, aid to families with dependent children, food stamps, special education for persons with eligible disabilities, Medicare, Medicaid, subsidized or public housing, or other economic, shelter or medical benefits provided directly to indigent individuals, but regardless, claims for actual or punitive damages is prohibited;
- c. Nothing herein shall be deemed to impair any attorney-client relationship.

12. Applicant certifies that:

- a. All attorneys employed by Grantee are in compliance with Rule 1.14 of the Texas Disciplinary Rules of Professional Conduct is titled, "Safekeeping of Property," and commonly referred to as the trust account rule.
- b. Grantee is in compliance with "RESTRICTED BUSINESS PRACTICES, OPERATIONS, AND CONTRACTS" listed above.
- c. IOLTA Rules Article XV Assurances: Applicant assures compliance with the following:
 - 1) Funds allocated by TAJF will be used only for the purposes set forth in the Rules Governing the Operations of the Texas Equal Access to Justice Foundation and any additional amendments.
 - 2) Applicant will:
 - i. at all times honor the attorney-client privilege and will uphold the integrity of the adversary process;
 - ii. not impose restrictions unrelated to statutes and rules of professional conduct on attorneys who provide representations to indigent clients with funds provided in whole or in part by TAJF;
 - iii. not discriminate on the basis of race, color, national origin, religion, sex, disability or age.
 - iv. All funds allocated by TAJF will be expended exclusively to support the provision of legal services without charge to low-income persons.

- v. Attorney fees received by the Applicant that are generated through court awards in cases funded by TAJF will be used to provide legal services without charge to low-income persons.
- vi. All funds allocated by TAJF will be expended exclusively to support services in the county or counties for which the monies were allocated.
- vii. Applicant will comply with quality control review procedures adopted by TAJF.
- viii. Applicant will comply with fiscal management and control procedures (Standards for Financial Management Systems and Audits) adopted by TAJF.
- ix. The Grantee will permit site visits and present additional information when deemed reasonably necessary to determine compliance with the Rules governing the Texas Equal Access to Justice Foundation.

13. APPLICANT CERTIFIES:

- a. Applicant represents and warrants that it will comply with Section 2252.906 of the Texas Government Code relating to disclosure protections for certain charitable organizations, charitable trusts, and private foundations.
- b. Applicant represents and warrants that TAJF and the Supreme Court of Texas's payments to Applicant and Applicant's receipt of appropriated or other funds under the contract or grant are not prohibited by Sections 403.1067 or 556.0055 of the Texas Government Code, which restrict lobbying expenditures.
- c. Applicant represents and warrants that it does not perform political polling and acknowledges that appropriated funds may not be granted to, or expended by, any entity that performs political polling.

14. RESTRICTED BUSINESS PRACTICES, OPERATIONS, AND CONTRACTS Applicant represents and warrants that it does not, and shall not for the duration of any funding, engage in any business operations, including but not limited to acquiring, developing, maintaining, owning, selling, possessing, leasing, or operating equipment, facilities, personnel, products, services, personal property, real property, or any other apparatus of business or commerce with:

- a. engage in any business operations, including but not limited to acquiring, developing, maintaining, owning, selling, possessing, leasing, or operating equipment, facilities, personnel, products, services, personal property, real property, or any other apparatus of business or commerce with Iran, Sudan or a foreign terrorist organization as prohibited by Section 2252.152 of the Texas Government Code;
- b. boycott Israel as prohibited by Section 2271.001-.002 of the Texas Government Code;
- c. have a practice, policy, guidance, or directive that discriminates against firearm entity or firearm trade association as prohibited by Section 2274.001-.002 of the Texas Government Code; or
- d. boycott energy companies as prohibited by Section 2276.001-.002, see also Section 809.001 of the Texas Government Code.

B. IOLTA SPECIAL TERMS

- 1. To any extent that the below specific terms conflict with the general terms above the specific terms control.
 - a. COURT ORDER COMPLIANCE Grantee must comply with the terms of the IOLTA Order, Rules, and General Grant Provisions.
 - b. CLIENT ELIGIBILITY. Applicant will:

- i. use the funds under the Civil Legal Services Program, awarded by TAJF to provide civil legal services directly to indigent people. "Indigent" means an individual who earns not more than 125% of the federal poverty guidelines published by the United States Department of Health and Human Services.
 - ii. Applicant agrees to conduct adequate screening and eligibility determination so that only TAJF eligible clients will be supported with TAJF funds.
 - iii. Applicant agrees to retain appropriate documentation as to client eligibility.
- 2. IOLTA funds may not be used:
 - to directly support a class action lawsuit.
 - to directly support a lawsuit against a governmental entity, except by groups or individuals to gain benefits authorized by statute or regulation, political party, or candidate SUITS AGAINST GOVERNMENT - Funds may be used to support a lawsuit brought by an individual, solely on behalf of the individual or the individual's dependent or ward, to compel a governmental entity to provide benefits that the individual or the individual's dependent or ward is expressly eligible to receive, by statute or regulation, including social security benefits, aid to families with children, financial assistance under Chapter 31, Human Resources Code, food stamps, special education for persons with disabilities, Medicare, Medicaid, subsidized or public housing, and other economic, shelter or medical benefits provided by a government directly to an indigent individual, but not to support a claim for actual or punitive damages.
 - to directly support lobbying for or against a candidate or issue.
 - for any case or matter that, if undertaken on behalf of an indigent individual by an attorney in private practice, might reasonably be expected to result in payment of a fee for legal services from an award to an individual client from public awards or from an opposing party, unless appropriate attempts have been made to obtain representation from an attorney in private practice ATTORNEY FEE CASES - The prohibition of handling cases involving requests for attorney fees from another but not the client, shall not be applicable in any case where the organization determines in good faith that the indigent person seeking legal assistance has made reasonable efforts to obtain the services of an attorney in private practice for the particular matter (including contacting attorneys in private practice in the county of residence of the indigent person who normally accept cases of a similar nature), and has been unable to obtain such services because the potential fee is inadequate, is likely to be uncollectible, would substantially consume any recovery by the client, or because of any other reason which the organization, acting in good faith, believes prevents the client from obtaining the services of a private attorney. Attorney fees received by the Grantee that are generated through court awards in cases funded by the TAJF will be used to provide legal services without charge to low-income persons.

C. BCLS, LAV, and LASSA SPECIAL TERMS AND CONDITIONS

- 1. To any extent that the below specific terms conflict with the general terms above the specific terms control.

- a. COURT ORDER COMPLIANCE Applicant must comply with the terms of the BCLS Order, Rules, Statutes and General Grant Provisions and
 - ii. LASSA Texas Government Code sec. 420.008 and Supreme Court Order 17-9008 to provide victim-related legal services to sexual assault victims, including legal assistance with protective orders, relocation-related matters, victim compensation, and actions to secure privacy protections available to victims under law.
 - iii. LAV Texas Government Code sec. 420.008 and Supreme Court Order 17-9009 Individual veterans and family members, for the purposes of these funds, a person is defined as a veteran as long as they have served in the active military, naval, or air service. Members of a veteran's family are members who are related to the veteran within the first degree by affinity or consanguinity and is a member of the veterans' household. Household means a unit composed of persons living together in the same dwelling. In order to be eligible for legal aid for a family member of a veteran, there must be a nexus between the legal services needed and benefit to the veteran and in accordance with LAV Texas Supreme Court Order at 8.7.
- a. CLIENT ELIGIBILITY. Applicant will:
 - i. use the funds under the Civil Legal Services Program, awarded by TAJF to provide civil legal services directly to indigent people. "Indigent" means an individual who earns not more than the required percentage of the federal poverty guidelines published by the United States Department of Health and Human Services.
BCLS 125%, LASSA and LAV 200%
 - ii. Applicant agrees to conduct adequate screening and eligibility determination so that only TAJF eligible clients will be supported with TAJF funds.
 - iii. Applicant agrees to retain appropriate documentation as to client eligibility.
 - iv. LASSA client eligibility:
 - v. LAV client eligibility:

2. **RESTRICTIONS** Basic Civil Legal Services (BCLS) awards may not be used:

- to directly or indirectly support a class action lawsuit.
- to directly or indirectly support a lawsuit against a governmental entity, except by groups or individuals to gain benefits authorized by statute or regulation, political party, or candidate (SEE BELOW SUITS AGAINST GOVERNMENT).
- to directly or indirectly support lobbying for or against a candidate or issue.
- to directly or indirectly support abortion litigation.
- to directly represent an individual who is confined to jail or prison.
- to directly provide legal services to an individual who is not legally in this country unless necessary to protect the physical safety of the individual.
- for any case or matter that, if undertaken on behalf of an indigent individual by an attorney in private practice, might reasonably be expected to result in payment of a fee for legal services from an award to an individual client from public awards or from an opposing party, unless appropriate attempts have been made to obtain representation from an attorney in private practice (SEE BELOW ATTORNEY FEE CASES).

SUITS AGAINST GOVERNMENT - Funds may be used to support a lawsuit brought by an individual, solely on behalf of the individual or the individual's dependent or ward, to compel a governmental entity to provide benefits that the individual or the individual's dependent or ward is expressly eligible

to receive, by statute or regulation, including social security benefits, aid to families with children, financial assistance under Chapter 31, Human Resources Code, food stamps, special education for persons with disabilities, Medicare, Medicaid, subsidized or public housing, and other economic, shelter or medical benefits provided by a government directly to an indigent individual, but not to support a claim for actual or punitive damages.

ATTORNEY FEE CASES - The prohibition of handling cases involving requests for attorney fees from another but not the client, shall not be applicable in any case where the organization determines in good faith that the indigent person seeking legal assistance has made reasonable efforts to obtain the services of an attorney in private practice for the particular matter (including contacting attorneys in private practice in the county of residence of the indigent person who normally accept cases of a similar nature), and has been unable to obtain such services because the potential fee is inadequate, is likely to be uncollectible, would substantially consume any recovery by the client, or because of any other reason which the organization, acting in good faith, believes prevents the client from obtaining the services of a private attorney.

3. A BCLS grantee awarded attorney's fees shall send the attorney's fees to TAJF who will forward funds to the Comptroller if any attorney representing a client involved in the case, was paid in that case directly from a BCLS grant. The Comptroller shall deposit the fees to the credit of the Account for use in the Basic Civil Legal Services Program.
4. Applicant understands that if awarded BCLS funds, they must submit to TAJF annually and quarterly a certification that all BCLS requirements are being complied with and that funds are not being used for prohibited activities. If applicant seeks to apply for BCLS funds, applicant must read the [BCLS Texas Supreme Court Order](#) and specifically Rule 9.7.
5. AUDIT Applicant further understands that annual audited financial statements and or audits, along with 990s, must be submitted to TAJF not later than 120 days after the close of the Applicant's fiscal year. Applicant also acknowledges that BCLS awards have additional audit requirements. Applicant's auditor must read, understand, and apply the Act, Rules, General Grant Provisions, including the allowable costs provisions as stated in the Uniform Grant Management Standards (except for the capital expenditure threshold, see General Grant Provision 4.03), Grant Agreement, and any other TAJF policy in determining compliance. Pursuant to Section 2262.154 of the Texas Government Code, the state auditor may conduct an audit or investigation of any entity receiving funds from the state directly under any contract or indirectly through a subcontract under the contract. The acceptance of funds by the Applicant or any other entity or person directly under the contract or indirectly through a subcontract under the contract acts as acceptance of the authority of the state auditor, under the direction of the legislative audit committee, to conduct an audit or investigation in connection with those funds. Under the direction of the legislative audit committee, the Applicant or other entity that is the subject of an audit or investigation by the state auditor must provide the state auditor with access to any information the state auditor considers relevant to the investigation or audit. Applicant shall ensure that this paragraph

concerning the authority to audit funds received indirectly by subcontractors through the contract and the requirement to cooperate is included in any subcontract it awards.

6. Records:

- a. Applicant shall maintain and retain all records relating to the performance of the grant including supporting fiscal documents adequate to ensure that claims for grant awards are in accordance with applicable State of Texas requirements. These records will be maintained and retained by Applicant for a period of four (4) years after the grant expiration date or until all audit, claim, and litigation matters are resolved, whichever is later. TAJF and the Supreme Court of Texas reserves the right to direct a Applicant to retain documents for a longer period of time or transfer certain records to TAJF and the Supreme Court of Texas custody when it is determined the records possess longer term retention value. Applicant must include the substance of this clause in all subawards and subcontracts.
- b. Applicant understands that TAJF and the Supreme Court of Texas will comply with the Texas Public Information Act (Chapter 552 of the Texas Government Code) as interpreted by judicial rulings and opinions of the Attorney General of the State of Texas. Information, documentation, and other material in connection with this Solicitation or any resulting contract or grant may be subject to public disclosure pursuant to the Texas Public Information Act. In accordance with Section 2252.907 of the Texas Government Code, Applicant is required to make any information created or exchanged with the State pursuant to the contract, and not otherwise excepted from disclosure under the Texas Public Information Act, available in a format that is accessible by the public at no additional charge to the State.

7. Subawards, Contracts for Services and Consulting:

- a. Applicant acknowledges and agrees that appropriated awards may not be expended in the form of a grant to, or contract with, a unit of local government unless the terms of the grant or contract require that the awards received under the grant or contract will be expended subject to the limitations and reporting requirements similar to those provided by the following:
 - i. Parts 2 and 3 of the Texas General Appropriations Act, Art. IX, except there is no requirement for increased salaries for local government employees;
 - ii. Sections 556.004, 556.005, and 556.006 of the Texas Government Code; and
 - iii. Sections 2113.012 and 2113.101 of the Texas Government Code.
- b. Applicant represents and warrants that it will include the following clause in the award documents for every subaward and subcontract and will require subrecipients and contractors to certify accordingly: "Under Section 231.006 of

the Family Code, the vendor or applicant certifies that the individual or business entity named in this contract, bid or application is not ineligible to receive the specified grant, loan, or payment and acknowledges that this contract may be terminated and payment may be withheld if this certification is inaccurate. A bid or an application for a contract, grant, or loan paid from state funds must include the name and social security number of the individual or sole proprietor and each partner, shareholder, or owner with an ownership interest of at least 25 percent of the business entity submitting the bid or application.”

- c. Applicant represents and warrants that it will maintain oversight to ensure that contractors perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders.
 - d. In accordance with Section 2254.033 of the Texas Government Code, relating to consulting services, Applicant certifies that it does not employ an individual who has been employed by TAJF or the Supreme Court of Texas or another agency Texas at any time during the two years preceding the submission of the Response or, in the alternative, Applicant has disclosed in its Response the following: (i) the nature of the previous employment with TAJF or the Supreme Court of Texas or the other agency; (ii) the date the employment was terminated; and (iii) the annual rate of compensation for the employment at the time of its termination.
 - e. Applicant represents and warrants that it will comply with Section 321.022 of the Texas Government Code, which requires that suspected fraud and unlawful conduct be reported to the State Auditor’s Office involving any subaward or contract.
 - f. Under Section 669.003 of the Texas Government Code, relating to contracting with an executive head of a state TAJF and the Supreme Court of Texas, Applicant represents that no person who served as an executive of TAJF and the Supreme Court of Texas, in the past four (4) years, was involved with or has any interest in the contract or grant. If Applicant employs or has used the services of a former executive of TAJF and the Supreme Court of Texas, then Applicant shall provide the following information in the Response: name of the former executive, the name of the state TAJF and the Supreme Court of Texas, the date of separation from the state TAJF and the Supreme Court of Texas, the position held with Applicant, and the date of employment with Applicant.
8. **Applicant acknowledges and agrees, and represents and warrants:**
- a. Applicant acknowledges and agrees that, to the extent Applicant owes any debt including, but not limited to, delinquent taxes, delinquent student loans, and child support owed to the State of Texas, any payments or other amounts Applicant is otherwise owed under the contract or grant may be applied toward any debt Applicant owes the State of Texas until the debt is paid in

full. These provisions are effective at any time Applicant owes any such debt or delinquency.

- b. Applicant represents and warrants that performance under the contract or grant will not constitute an actual or potential conflict of interest or reasonably create an appearance of impropriety. Further, Applicant represents and warrants that in the administration of the grant, it will comply with all conflict of interest prohibitions and disclosure requirements required by applicable law, rules, and policies, including Chapter 176 of the Texas Local Government Code. If circumstances change during the course of the contract or grant, Applicant shall promptly notify TAJF and the Supreme Court of Texas.
- c. Applicant represents and warrants that it will comply with Section 321.022 of the Texas Government Code, which requires that suspected fraud and unlawful conduct be reported to the State Auditor's Office.
- d. Applicant represents and warrants that it will comply with Section 2252.906 of the Texas Government Code relating to disclosure protections for certain charitable organizations, charitable trusts, and private foundations.
- e. Applicant represents and warrants that TAJF and the Supreme Court of Texas's payments to Applicant and Applicant's receipt of appropriated or other funds under the contract or grant are not prohibited by Sections 403.1067 or 556.0055 of the Texas Government Code, which restrict lobbying expenditures.
- f. Applicant represents and warrants that it does not perform political polling and acknowledges that appropriated funds may not be granted to, or expended by, any entity that performs political polling.

9. Applicant certifies that:

- a. Applicant is not listed as a prohibited vendor list authorized by Executive Order No 13224, *Blocking Property and Prohibiting Transactions with Persons Who Commit, Threaten to Commit, or Support Terrorism*, published by the United States Department of the Treasury, Office of Foreign Assets Control.
- b. Applicant is eligible to receive grant funding pursuant to Section 2155.004(b) of the Texas Government Code, financial participation prohibited.
- c. Applicant is eligible to receive grant funding pursuant to Section 2155.0061 of the Texas Government Code, human trafficking prohibition.
- d. Applicant is eligible to receive grant funding pursuant to Section 2261.053 of the Texas Government Code, disaster relief violation.
- e. If Applicant has access to any state computer system or database, Applicant shall complete cybersecurity training and verify completion of the training program to the TAJF and the Supreme Court of Texas pursuant to and in accordance with Section 2054.5192 of the Government Code.

- f. Applicant certifies that neither it nor its principals are suspended or debarred from doing business with the state or federal government as listed on the *State of Texas Debarred Vendor List* maintained by the Texas Comptroller of Public Accounts and the *System for Award Management (SAM)* maintained by the General Services Administration and will not become so during the term of the Grant Contract. The recipient and subrecipients acknowledge that this Grant Contract may be terminated and all payments withheld if this certification becomes inaccurate during the term of the Grant Contract

Applicable Law

This application shall be governed by and construed in accordance with the laws of the State of Texas, without regard to the conflicts of law provisions. The venue of any suit arising under this agreement is fixed in any court of competent jurisdiction of Travis County, Texas, unless the specific venue is otherwise identified in a statute that directly names or otherwise identifies its applicability to the contracting state TAJF and the Supreme Court of Texas.

The Parties expressly agree that no provision of the application, grant, or contract is in any way intended to constitute a waiver by the TAJF and the Supreme Court of Texas or the State of Texas of any immunities from suit or from liability that the TAJF and the Supreme Court of Texas or the State of Texas may have by operation of law.

APPLICANT SHALL DEFEND, INDEMNIFY AND HOLD HARMLESS THE STATE OF TEXAS AND TAJF AND THE SUPREME COURT OF TEXAS, AND/OR ITS OFFICERS, AGENTS, EMPLOYEES, REPRESENTATIVES, CONTRACTORS, ASSIGNEES, AND/OR DESIGNEES FROM ANY AND ALL LIABILITY, ACTIONS, CLAIMS, DEMANDS, OR SUITS, AND ALL RELATED COSTS, ATTORNEY FEES, AND EXPENSES ARISING OUT OF, OR RESULTING FROM ANY ACTS OR OMISSIONS OF APPLICANT OR ITS AGENTS, EMPLOYEES, SUBCONTRACTORS, ORDER FULFILLERS, OR SUPPLIERS OF SUBCONTRACTORS IN THE EXECUTION OR PERFORMANCE OF THE CONTRACT AND ANY PURCHASE ORDERS ISSUED UNDER THE CONTRACT. THE DEFENSE SHALL BE COORDINATED BY APPLICANT WITH THE OFFICE OF THE TEXAS ATTORNEY GENERAL WHEN TEXAS STATE AGENCIES ARE NAMED DEFENDANTS IN ANY LAWSUIT AND APPLICANT MAY NOT AGREE TO ANY SETTLEMENT WITHOUT FIRST OBTAINING THE CONCURRENCE FROM THE OFFICE OF THE TEXAS ATTORNEY GENERAL. APPLICANT AND TAJF AND THE SUPREME COURT OF TEXAS AGREE TO FURNISH TIMELY WRITTEN NOTICE TO EACH OTHER OF ANY SUCH CLAIM.]

By signing below, the Applicant certifies that the above assurances and certifications are true and correct to the best of its knowledge and Applicant will comply with these assurances if the application is approved and funds are awarded.

Executive Director

Print Name

Date

Board Chair

Print Name

Date